



Catapult Fundraising's *Legacy Call* Program Secures Over \$6.8 Million in Planned Gifts for an International Ministry

The Situation: Catapult Fundraising partnered with a ministry located in northern California to provide an off-site planned giving telephone outreach program to 1,000 of the ministry's most loyal donors.

The Goals: Catapult's *Legacy Call* program has four broad goals:

1. To thoroughly thank the donors for their loyal support over the years
2. To determine interest in including the ministry in their estate plans
3. To confirm and quantify gifts already completed and thank/recognize these donors
4. To educate/assist donors about planned gift options

The Solution: Catapult partnered with the ministry to design a highly personalized planned giving telephone outreach program and selected 1,000 of the ministry's best planned giving prospects to contact. Donors were called by Catapult's Tier 1 callers who thanked the prospect for loyal support over the years and determined the prospect's interest in making a planned gift. If interest was identified, an additional phone call was made by a Tier 2 caller. Catapult's Tier 2 callers are gift planning consultants, each with more than 20 years of experience working directly in planned giving. They have held roles such as Director and Vice President of Planned Giving at major institutions across the United States. Tier 2 callers discussed gift options with donors and confirmed and quantified planned gifts over the phone. Gift commitment forms were sent to donors and signed commitments were then sent back to the ministry.

The Result: Of the 1,000 donors that were reached during the calling program, 31% expressed a current interest in planned giving or had already completed a planned gift. Tier 2 callers followed up with each of these individuals to secure the gift. The projected planned giving results for telephone outreach programs are that 10-15% of those reached would have an interest in planned giving. The 31% rate of interest Catapult's calling program identified indicates that the ministry has a very loyal donor base, and donors should continue to be solicited for a planned gift in a similar manner.

Tier 2 callers secured and received written/verbal confirmation of 43 planned gifts, which totaled \$2,077,813. Tier 2 callers identified an additional potential of \$90,000 from prospects with short-term planned giving/outright interest (within the next 12 months), a potential of \$126,000 in long-term planned giving interest (within the next 5 years), and a potential of \$123,750 from prospects who would like to continue to receive planned giving marketing materials. Tier 1 callers were able to identify an additional potential of \$499,500 from prospects who expressed a possible interest in making a planned gift in the future.

Total confirmed gifts: \$2,077,813
Total potential gifts: \$839,250
Total gift potential/confirmed gifts: \$2,917,063
Cost per dollar for confirmed gifts: \$0.03

Program Roll-Out

Phase Two: Due to the highly successful planned giving calling program, the ministry partnered with Catapult to conduct a second phase of calling.

Catapult callers reached out to an additional 2,100 loyal donors to identify previously made planned gifts and identify planned giving interest. The program yielded 1,305 decisions, of which, 106 resulted in a planned gift. An additional 259 prospects expressed interest in exploring gift planning options in the future. The ministry will continue to steward and follow up with these prospects.

Tier 2 callers secured and received written/verbal confirmation of 106 planned gifts, totaling \$4,789,348. There is potential of an additional \$909,000 from prospects with short-term planned giving/outright interest, a potential \$459,000 in long-term planned giving interest, and a potential \$675,000 from prospects who would like to continue to receive planned giving marketing materials.

Total confirmed gifts:	\$4,789,348
Total potential gifts:	\$2,043,000
Total gift potential/confirmed gifts:	\$6,832,348

Phase 1 and 2 Grand totals:

Phase 1 & 2 total confirmed gifts:	\$6,867,161
Phase 1 & 2 total potential gifts:	\$4,960,063
Cost per dollar for confirmed gifts:	\$0.03

Conclusion: Over two separate phases of the *Legacy Call* program, the ministry provided Catapult Fundraising with 3,100 loyal donors to solicit over the course of 12 months.

Catapult Fundraising's *Legacy Call* program accomplishes many goals. Loyal donors were thanked for their years of support. Through Catapult's process, callers were able to identify prospects who already left the ministry in their will, which allows the organization to properly acknowledge these gifts they otherwise would not have known about. New planned gifts were confirmed through Tier II calling by gift planning specialists. For those donors who did not commit to making a gift at this time, they were educated on planned gift options to consider for the future. Lastly, a pipeline for major gifts and future planned gifts was created for the ministry. The effects of the *Legacy Call* program will impact their development efforts for years to come.