



Artsmarketing Services Case Study: Uber-loyal Donors: Their Passion for Mission and the Importance of Legacy Giving

BACKGROUND:

“A smart planned giving program is essential to the long-term success of every non-profit organization.”

USC Canada, which has an extraordinarily strong loyal base of donors, was seeking to capitalize on this assumption, yet, as a relatively small international



development agency, they were confronted with many obstacles and competing priorities as they tried to build a legacy donor program. USC donors are extraordinarily loyal. They are spread out across the country in rural communities. Despite a strong communication strategy stressing the importance of legacy gifts and their best efforts, they were not reaching all of their potential legacy supporters. USC understood that they did not have the staff power to identify and reach out to all of their donors and so they turned to Artsmarketing Services Inc. (AMS).

USC Canada’s choice of the **LEGACY BUILDER™** campaign came as a result of the an opportune meeting where Brian McFarlane, their long term Director of Fundraising, attended a **LEGACY BUILDER™** training session conducted by AMS Vice President Mark Douglas Trask in May 2015. A conversation ensued about the practicalities of a small NGO like USC conducting a proactive **LEGACY BUILDER™** campaign and its potential to quickly garner enormous levels of support for USC Canada and its Foundation. Understanding the important trifecta of planned giving, that it is 1) based on relationships², 2) about a donor’s passion³ and 3) about the importance of the mission of the organization⁴, the USC development team saw real opportunity in reaching out to its donors, many of whom have been supporting the organization for more than 30 years, about legacy giving.

The mission of USC Canada and what USC had achieved as an international development agency was deeply important to these “uber-loyal” donors. USC Canada’s long-term stability is something that these donors wanted to ensure for decades to come. USC also understood that “planned gift donors are a subset of the charity’s donors, and are generally those donors, at every income and donation level, who are the

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most consistent contributors⁵.” These loyal members of the USC donor family, having consistently provided financial support to USC through years of donations, were prime planned giving prospects. Their relationship to, passion for and commitment to USC Canada’s mission was still an invaluable resource – and in the case of planned giving – an, as of yet, untapped resource.

The challenges USC Canada faced involved how to leverage the passion, loyalty and commitment of these donors while introducing a legacy conversation; how to encourage a legacy gift before their connection to the USC starts to diminish; how to effectively contact such a large pool of potential planned giving prospects while building and deepening the donor relationship in order to make a legacy gift ask; and how to still remain within the set budget and staffing resources of the organization. Enter Artsmarketing Services Inc. (AMS) – a leader in marketing and revenue generation in the not-for-profit sector in North America for over three decades.

MARKETING PARTNERSHIP FOR SUCCESS:

AMS was a perfect partner for USC Canada’s planned giving campaign. With extensive experience in **LEGACY BUILDER™** campaigns across North America, AMS understood how to accomplish what all planned giving programs need: To build and deepen donor relationships and make a personal ask to legacy giving prospects. This would be accomplished through a comprehensive planned giving telefunding campaign.

Michael J. Rosen, CFRE and bestselling author of *Donor-Centered Planned Gift Marketing* is very clear that marketing for planned giving should not be passive⁶ and woefully acknowledges that “organizations that would never think twice about picking up the phone and soliciting annual fund gifts would never use the telephone to solicit gift annuities.”⁷ AMS knows how strategic the telephone is to planned giving cultivation, including the importance of telephone conversations with the invaluable middle donor segment.

Branding agency Barefoot Creative states, “The most likely candidates for bequest and legacy gifts are actually the mid-level segment. While they may never have significant major cash gifts in their lifetime, they are able to leave a legacy gift when they are able to disperse their life assets.”⁸ AMS champions the middle donor. Over the years AMS has developed a sophisticated approach that allows organizations to cast a much wider net than would be possible with traditional planned giving programs. By overlaying proven annual giving telefunding techniques with highly trained callers who are well versed in planned giving strategies and practices, AMS is able to reach the invaluable middle donor segment and accelerate planned giving programs. AMS unlocks the hidden potential of your middle donors and elevates your planned giving program to new heights.

The telephone is also an important tool for planned giving cultivation, particularly with the middle donor segment. Many middle donors prefer

“phone strategies to personal engagement.” Research by UK-based direct marketing agency Bluefrog shows that appropriateness in communication is vital to retaining the mid-level segment and that respectful telephone interaction is very acceptable to middle donors¹⁰.

DATA ANALYTICS:

A key element of effective data analysis is the ability to understand what the data does and does not contain and what information in the data is and is not relevant and/or important to the key business decisions at hand. Raw data should be examined, ordered and organized so that useful informed conclusions may be drawn. In any context, including a fundraising one, a potential risk with data management is the temptation to push a particular agenda and to drive the data to support that agenda. Certain assumptions are made prior to analyzing the data and this can lead to a data analytics process that forces the data to “obey” the hypothesis. AMS does not “bend” in this manner. We employ a highly disciplined approach to the data: This is a corporate strength that has been culled with more than thirty years of industry expertise in direct marketing.

Data mining is achieved through our sophisticated, proprietary software: **ALCHEMY**. With **ALCHEMY**'s leading-edge data mining capabilities and by employing industry-leading data analytic processes, AMS pays attention to planned giving data. We allow the data to “speak” for itself which enables AMS to partner with clients, like USC, and plan smart strategies. Data is approached with critical thinking and this provides a data-driven platform to reach effective and strategic decisions and conclusions.

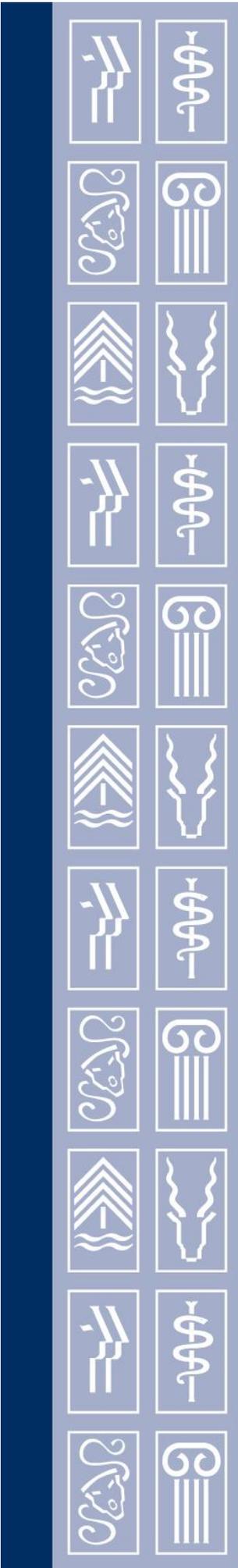
AMS strategic campaign leadership further achieved optimal planned giving campaign results with **ALCHEMY** – the AMS proprietary lead management and reporting database to customize reporting and analytics for our clients. Stellar USC results were created with **ALCHEMY** and seamlessly too – as **ALCHEMY** uploads customized, automatic, data reports into data management systems like Raiser's Edge or Tessitura. This fully automated software has allowed planned giving campaigns – like USC's – to see real time reports with detailed results by lead segment allowing decisions to be made based on key data, creating elevated results across the planned giving campaigns.

CAMPAIGN SUCCESSES:

USC campaign results are exemplary. In just a few months AMS reached out to 4,876 households and identified over 111 Bequest Confirmations and uncovered an additional 780 Bequest Considerations. This represents an estimated \$2.7 million in immediate Bequest Confirmations, and a further \$19.5 million in strong legacy giving prospects.

Campaign Segment	Bequest Confirmations	Bequest Considerations
Households – 4,876	\$ 2,775,000	\$ 19,500,000
COMBINED TOTAL	\$ 22,275,000 *	

*Revenue projections utilize a conservative place holder bequest average of \$25,000 collaboratively established between USC and AMS.



The work of AMS has “kick-started” USC’s planned giving program and achieved results that will prove transformational to USC’s financial future. Through the confirmed and identified legacy gifts of the AMS campaign, loyal donors have strengthened their lasting relationships with USC and its programs. These legacy gifts also reveal the depth of passion that loyal supporters hold for USC and the importance they place in continuing the mission of USC and USC’s place as a leader in Canada and beyond. **Through its partnership with AMS, USC has conservatively uncovered over \$22.2 million in legacy gifts.** The outstanding success of the USC planned giving program has made a giant leap forward in a highly efficient and seamless way. The quality of the contacts was exemplary with only one or two very minor complaints. The overall feeling of the donors was pleasant, with one caller stating, “It was almost as if they were waiting to be called.” The campaign gave these passionate supporters the opportunity to do something they really wanted to do. USC Canada established an important future revenue stream of millions.

ABOUT USC CANADA:

Founded in 1945 by Dr. Lotta Hitchmanova (1909-1990), a Czech refugee rescued from war-torn Europe, the Unitarian Service Committee helped those suffering from the aftermath of World War II. Her compassion struck a chord with Canadians. Thousands answered her call and gave food, clothing and cash to help those in need, making USC Canada one of the very first international development agencies in Canada. Since these early years, the Seeds of Survival has evolved to include farmer led seed banking networks, seed breeding programs, training and knowledge exchanges working in 11 countries around the globe, Seeds of Survival supports farmers so they can stay on their land and grow more healthy food for their families and communities. At the same time, USC’s programs aim to preserve the environment and enhance valuable biodiversity, essential to healthy food systems. Similar programs are now in more than 50 countries, many as a direct result of involvement in a Seeds of Survival training program. In 1999, the Canadian Council for International Cooperation (CCIC) awarded Seeds of Survival for its innovative programming in the area of food security.

With partners in 10 Global South countries, USC Canada supports women, small-scale farmers and young people. In 2013, Seeds of Survival went truly global when USC Canada brought the Seeds of Survival approach to Canada to support farming communities here at home. See more at www.usc-canada.org.

ABOUT AMS:

Offering individually designed telephone fundraising and subscription services to the North American non-profit community since 1982, Artsmarketing Services (AMS) focuses on partnership. AMS creates strategic, data-driven, high-touch and relationally-focused telefunding campaigns for our clients that deepen donor engagement and consistently achieve optimal fundraising results. In addition to **LEGACY BUILDER™** campaigns, our specialties include annual fund (monthly conversion/upgrades, renewals, lapsed reactivation, new acquisition), capital, endowment and a full range of subscription sales campaigns

(renewals, lapsed reactivation, new acquisition). Utilizing state-of-the-art custom analytics, tailored scripting and mission-oriented professionals, AMS has raised nearly **\$1 billion** in annual fund donations, memberships and subscriptions from more than **3 million new supporters** over the last **three decades**. Our **LEGACY BUILDER™** campaigns have resulted in over **25,000 bequests** conservatively estimated at more than **\$700 million**.

Call us - toll free - from anywhere in the USA, Canada, or Australia 888-941-9333 to schedule a free personal consultation.

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¹ Garecht, Joe (2011). Michael J. Rosen: Four Common Planned Giving Myths Busted. From <http://www.thefundraisingauthority.com/planned-giving/planned-giving-myths/>.

² Tempel, Eugene R., Seilier, Timothy L. and Aldrich, Eva E. (2010). Achieving Excellence in Fundraising. Wiley. Also: Miree, Kathryn W. (2007). Asking the Right Questions: The Mysteries and Metrics of Planned Giving Programs. 2007 National Conference on Planned Giving.

³ Jordon, Ronald & Quynn, Katelyn L. (2009). Planned Giving: 4th Edition A Guide to Fundraising and Philanthropy. Wiley.

⁴ Wasley, Paula (2009). New Research Sheds Light on Bequest Giving. From Philanthropy.com.

⁵ Miree, Kathryn W. (2007). Asking the Right Questions: The Mysteries and Metrics of Planned Giving Programs. 2007 National Conference on Planned Giving.

⁶ Garecht, Joe (2011). Michael J. Rosen: Four Common Planned Giving Myths Busted.

⁷ Ibid.

⁸ Barefoot Creative (2014). The Middle Donor. In partnership with Canadian Mennonite University, the Barefoot Conference and Mike Tenant.

⁹ Ibid.

¹⁰ Bluefrog (2007). The Fundraiser's Guide to Mid-Value Donors. Research undertaken by Amber Nathan. Edited by Mark Phillips.