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# UNDERSTANDING OUR FUTURE BEQUEST DONORS AND THE OPPORTUNITY

Decorative wavy lines in a light gray color are positioned at the bottom of the slide, mirroring the blue waves at the top.

### How to use this worksheet:

Identify the different types of supporters in your organization, and the number of supporters you have in each category (the columns on the left side of the table).

During lesson 1.3, do the calculation on the right side of the table. (Note, you'll need to know your estimated average bequest that you've determined in lesson 1.1)

If you want to get more advanced, you can create a spreadsheet to calculate this information. But for now, this is a simple way to get stated. Note there's a simple version (overall donor count), a detailed version (segmentation suggestions), and a blank worksheet below.

### KEY

Volume	How many people in this category
Notes	Use this to provide additional information about this group
Volume (A)	This is the number of people you have in this type
Pledge rate (RANGE)	This is an estimated range you can use to inform your own estimated take up rate.
Pledge rate (B)	This range goes from the mild through to the hot pledge rate. You'll want to be aiming towards the HOT end of the scale! But things like donor loyalty and other factors could influence it. If you're doing this course, you'll want to aim for at least the half way point in the range or higher (eg, a range of 3%-15% would have a half way point of 9).
Average Bequest (C)	You should have identified this amount in lesson 1.1 based on your country average, your organization average or by looking at other similar organizations. Eg, in the US, the average value of an individual bequest is US\$35,000.
Future Value of Bequests (D):	You'll want to define this for each segment but also define your total, by adding all of the rows together!

### Basic version:

Types of Supporters	Notes	Volume (A)	Pledge Rate (RANGE)	Pledge Rate % (B)	Number of potential pledgers A x B	Future value of bequests (D) A x B x C
All donors who have given 2 or more gifts			1%-5%			

### Detailed version:

Types of Supporters	Notes	Volume (A)	Pledge Rate (RANGE)	Pledge Rate % (B)	Number of potential pledgers A x B	Future value of bequests (D) A x B x C
EXAMPLE: Board Members (present and past)	12 current board members, 88 past board members	100	3%-15%	10%	10	\$350,000
Board Members			3%-15%			
Volunteers			3%-15%			
Staff			1.5%-7.5%			
Donors who have given over \$1000 in the last 3 years			3%-15%			
Loyal one-off donors \$50+, 3+ gifts, gave in the last 12 months			2.5%-12.5%			

Loyal monthly donors \$25+ per month, at least 2 years, and have upgraded at least once and still giving (not acquired by face-to-face/street fundraising)			2.5%-12.5%			
Donors who give both monthly donations <u>and</u> occasional one-off gifts			1.5%-7.5%			
Active one-off donors More than one gift, gave in the last 2 years			1%-5%			
Active monthly givers that don't fit in to the above categories (but not acquired by face-to-face/street fundraising)			1%-5%			
Loyal monthly donors \$25+ per month, at least 2 years, and have upgraded at least once and still giving (YES - acquired by face-to-face/street fundraising)			1%-5%			
All other one-off donors who don't fit into the above category, but have given at least 2 gifts			0.5%-2.5%			
All other monthly donors			0.25%-1%			
Other supporters?			?			
<b>TOTAL</b>						

Types of Supporters	Notes	Volume (A)	Pledge Rate (RANGE)	Pledge Rate % (B)	Number of potential pledgers A x B	Future value of bequests (D) A x B x C
<b>TOTAL</b>						

## Planning your Gift in Will budget

Very few fundraising organisations with individual giving programs invest enough in bequest / legacy / gift in will programs. Now you've completed the worksheet above, it could be handy to know how much you should or could invest to maximise those amounts.

The table below should help you when you are working out what kind of budget you should have to invest in bequests. The first two columns give an idea of the number of direct marketing campaigns an organisation may find the optimum balance between workload, income and frequency of donor communications. Eg newsletters and appeals.

You should definitely budget for an annual survey and donor care communications, and also budget for at least a basic donor welcome journey. Welcome journey essentials would be a thank you, survey and phone call.

However, if you haven't got the cash, don't put too much in yet, stick to nudging (mention in newsletters, follow up leads from your survey). But make sure you are planning to get have more to invest in say 3-7 years from now. Bequest fundraising needs forward planning on a different scale to everything else we do.

Note: On **TOP** of these 'standard' communications we recommend all bequest leads from the survey are called, mailed and invited to appropriate events if you do them. Don't forget to budget for salaries too!

<u>Mail responsive donors</u>	Mail campaigns	Multi mailing campaigns	Survey	Donor care / birthday etc	Bequest solus campaign^	Tick box on response form	Solus phone calls (vol)*
<400	2	Maybe 1	1+welcome~	1	0+welcome	2	50
400 – 1000	3 – 4	1 or 2	1+welcome	1 or 2	0+welcome	2	50-120
1,000 – 3,000	3 – 5	2	1+welcome	1 or 2	1+welcome	3	120-400
3,000 – 10,000	4 – 8	At least 2	1+welcome	1 or 2	1+welcome	4	400-1200
10,000 – 20,000	6 – 10	At least 3	1+welcome	2 or 3	1+welcome	5	1200-2400
20,000+	8+	Probably 4	1+welcome	2 or 3	1+welcome	5	2500+

<u>Email responsive donors</u>	Email campaigns	Emails per campaign	Survey	Donor care / birthday etc	Bequest solus campaign^	Pop up after donation	Solus phone calls (vol)*
<400	3	2	1+welcome	1	0+welcome	2	25
400 – 1,000	4 – 5	3 – 4	1+welcome	1 or 2	0+welcome	2	25-60
1,000 – 3,000	5 – 6	6 – 7	1+welcome	1 or 2	0+welcome	3	60-200
3,000 – 10,000	6 – 8	6 – 7	1+welcome	1 or 2	1+welcome	4	200-600
10,000 – 20,000	8 – 12	6 – 7	1+welcome	2 or 3	1+welcome	5	600-1200
20,000+	12+	6 – 7	1+welcome	2 or 3	1+welcome	5	1200+

^ Solus campaign is a mail or email campaign asking people about their interest in supporting you with a gift in will. This is on top of following up leads from the survey.

\* Solus phone calls are like solus campaigns but on the phone.

~ Welcome is suggesting this communication within first 8 weeks following someone's first donation as part of the welcome cycle.

**Any questions!? Book Sean for a free chat with some advice. Use this link [www.BookSeanNow.com](http://www.BookSeanNow.com) to find a slot in Sean's diary for a free chat.**