



Catapult Fundraising's *Legacy Call* Program Secures \$2,825,000 in Planned Gifts for a U.S. Presidential Library

The Situation: Catapult Fundraising partnered with a U.S. Presidential Library to provide a planned giving telephone outreach program to 2,000 of the organization's most loyal donors. Due to their large number of loyal donors, Catapult partnered with the Library to help identify gift planning interest, cultivate these prospects, and educate donors on planned giving options.

The Solution: Catapult partnered with the Library to design a highly personalized planned giving telephone outreach program and selected 2,000 of the best planned giving prospects to contact. Donors were called by Catapult's Tier 1 callers who thanked the prospect for their loyal support over the years and determined the prospect's interest in making a planned gift. Depending on their level of interest, an additional phone call was made by a Tier 2 caller. Catapult's Tier 2 callers are planned giving specialists, 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 informed *Legacy Call* prospects of their planned gift options and confirmed and quantified planned gifts over the phone.

The Goals: *Legacy Call* calling programs have four broad goals:

1. To thoroughly thank the donors for their loyal support over the years
2. To determine interest in including the Library 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 Result: Of the 2,000 prospects called, 22% expressed a current interest in planned giving or had already completed a planned gift. Those donors were referred to Planned Giving Specialists for follow-up. The projected planned giving results for telephone outreach programs are that 10-15% of those reached would have an interest in planned giving. The 22% rate of interest our calling program identified indicates that the donor base has very strong loyalty to the organization.

An additional 17% of the prospects expressed 'future planned giving interest'. The organization will personally follow up with these donors in the future.

Tier 2 callers secured and received written/verbal confirmation of 26 planned gifts, which totaled \$2,825,000. There is potential of an additional \$600,000 from prospects with short-term planned giving/outright interest, a potential \$50,000 from prospects with long-term planned giving interest, and a potential \$860,000 from prospects with possible future interest.

Total confirmed gifts:	\$2,825,000
Total potential gifts:	\$1,510,000
Total gift potential/confirmed gifts:	\$4,335,000
Cost per dollar for confirmed gifts:	\$0.04

Conclusion: Catapult Fundraising's Legacy Call program accomplishes many goals. Most importantly, loyal donors were thanked for their years of support to the Library.

Through Catapult's process, callers were able to identify prospects who already left the Library in their will, which allows the Library to properly acknowledge these gifts they otherwise would not have known about.

New planned gifts were confirmed through calls with our 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 Library. The effects of the Legacy Call program will impact the Library's development efforts for years to come.