

# Legacy Calling on a Budget: A Glimpse into Seattle Pacific University's First Attempt at Telemarketing for Bequests

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- Why hadn't we tried it before?
  - Afraid of doing more harm than good.
  - Stelter Study —“80% of planned givers chose not to reveal their gift saying details of their wills are their own business and no one else needs to know.”
  - Stelter again —“Fewer than one in 10 opt for a personal call” as the preferred mode of initial contact about including a nonprofit in estate plans.
  - Cost of professional firms prohibitive.
- Demographics
  - Looked at stats — age 49 is the average age of first charitable bequest, age 75-85 age of last will, three or more gifts to your organization.
  - We defined our own “sweet spot” as ages 50-75, at least one gift in the last five years.
  - We excluded people who had recently been called for annual gifts, and those who had received our fall bequest mailing and email.
- Strategy
  - We timed our calls to follow receipt of our planned giving newsletter two weeks prior.
  - Introduce self, where from, calling to follow up on newsletter we sent you earlier this month.
  - “Do you remember receiving *Significance*?”
  - “In this issue there was a wonderful cover story about...who are members of Seattle Pacific's Wellspring Society.”
  - “Have you heard of the Wellspring Society at SPU?” Repeat its purpose.
  - Testimony —“I know as a student I have personally benefited from gifts that our alumni/friends have left in estate plans and couldn't be here if not for that scholarship support.”
  - “Have you considered including charities you care about, like SPU, in your will?”
  - Variety of student responses...thanks, it's easy to do, we have information, staff that can help.
  - Goals for prizes — new members, gift officer calls, brochures for more info.
  - If no way, then thank for honesty on topic, for continued support of University.
  - Ended with prayer requests (in keeping with our Christian mission).
- Callers and Training — new script walk through plus basic training on charitable bequests, why important to University, what motivates people to plan them, etc.
  - Team of seven callers per night.
  - Total cost: \$800 (salaries, prizes, “quesadilla night” thank you)
- Results — surpassed our expectations!
  - Attempted 1,686 calls and completed 400 conversations.
  - Learned of 18 new bequest notifications.
  - A total of 81 people requested our legacy brochure to learn more.
  - Six people requested that a gift officer call to talk more about their estate planning.
  - A total of 16 people requested “no more phone calls or do not solicit codes.”
  - One irritated person took time to write.
- Follow-up — personal and tailored by gift officer, with attention to student caller notes.