

Bequest Calling Program – Washington State University

Presented by: Mike Connell

Overview

WSU Foundation contracts with RuffaloCody (www.ruffalocody.com) for our annual giving phonathon program. The scope of our relationship is significant and we are a “Master Client”. One benefit for Master Clients (at no additional charge) is a Planned Giving “Survey”. They commit to completing 250 surveys. Though referred to as a survey, they are confident they will uncover new members of your Legacy Society and possible CGA leads. Their history suggested that they would need to contact approximately 1,000 households to complete 250 surveys. To determine which 1,000 households to call we focused on *years of giving* as the primary sort. We started with 25 years of giving and then eliminated individuals already in our Legacy Society, assigned prospects, those with whom we had recent documented contact, those under 55, those over 85 and those living in states where we are not authorized to offer CGAs. With some cleanup we had our 1,000. The cost of this program for a new client would be_____.

RuffaloCody assigns you a Project Manager and there are individual team members assigned to: customize your scripts, lead piece and follow up documents; tailor and manage reports/data/your IT needs; and handle caller training and supervision. Once calling begins there are daily data reports posted to the password accessible server with specific follow up steps for those who completed the survey. We had a series of conference calls with those individuals to monitor activity and results. They also provide a summary of expected outcomes and monitor how things go vs. peer institutions.

Outcome:

We have eight new documented Legacy households. We also sent CGA info to more than 25 leads and they did a follow up call. They then informed us of the leads that definitely wanted WSU follow up. We have contacted those prospects but have not closed a new CGA from this prospect pool to date. We may follow up with the CGA leads again this spring (in house).

Final Thoughts/Impressions:

Positives: RuffaloCody is very good. They are extremely organized and thorough. Generally speaking, their callers are well trained and know what they are doing but I thought we would make more headway on the CGA leads.

Negatives: Not much. The data can be overwhelming. Their coding system takes awhile to comprehend. Some of the leads were not as strong as they appeared to be. Their initial IT request was extensive but since we are already a client our systems people had no problem.

Contact info:

Mike Connell
Director, Gift Planning
WSU Foundation
PO Box 641925
Pullman, WA 99164
509-335-5865
connell@wsu.edu

Liz Ryan
Associate Director, Gift Planning
WSU Foundation
520 Pike St. # 1101
Seattle, WA 98101
206-770-6062
lizryan@wsu.edu

Tim Logan
VP/Sr. Consultant
Ruffalo Cody
12357 Brown Fox Way
Reston, VA 20191
800-765-7483
tim.logan@ruffalocody.com