The Elusive, Ever-Changing and Shape-Shifting Planned Giving Donor

Exploring more than 20 years of planned gift donor advanced analytics modeling

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Lawrence C. Henze

LOCATION: PARKER, COLORADO
AT BLACKBAUD: 20 YEARS

Katherine E. Swank

LOCATION: LITTLETON, COLORADO
AT BLACKBAUD: 14 YEARS

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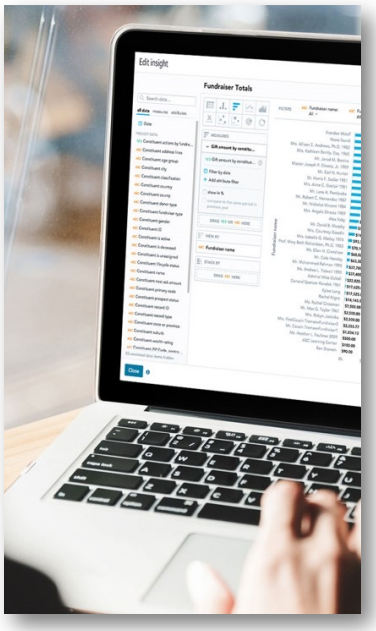
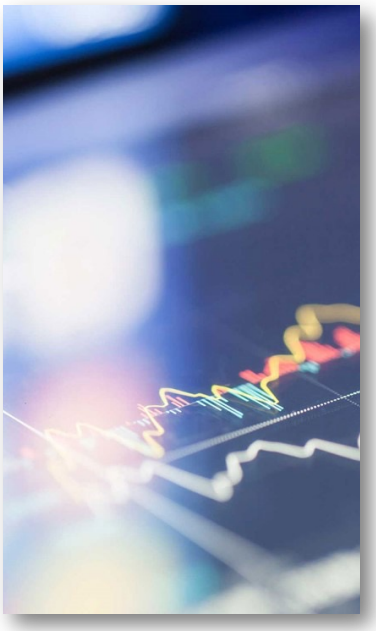
POLL

Has your organization created a planned gift donor model or models?





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Data intelligence turns *"just data"* into *"actionable value"*

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A short history of our model progression

Early 2000s
Developed the FIRST probit regression planned gift donor models for commercial use

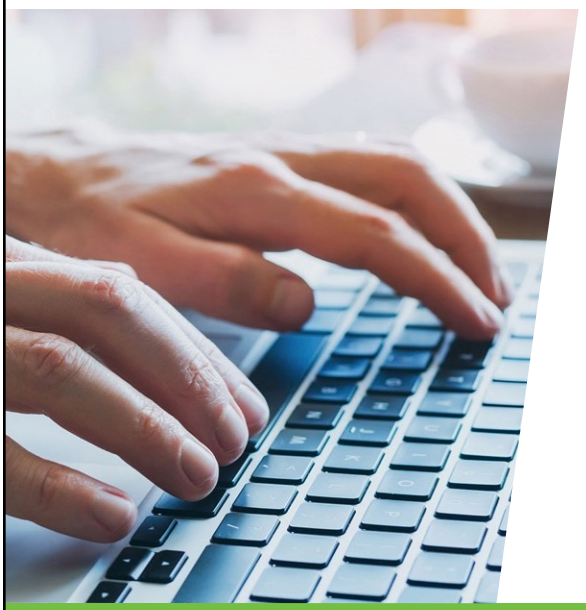
Mid-2000s
Updated the models with a LARGER data set and more information from customer databases

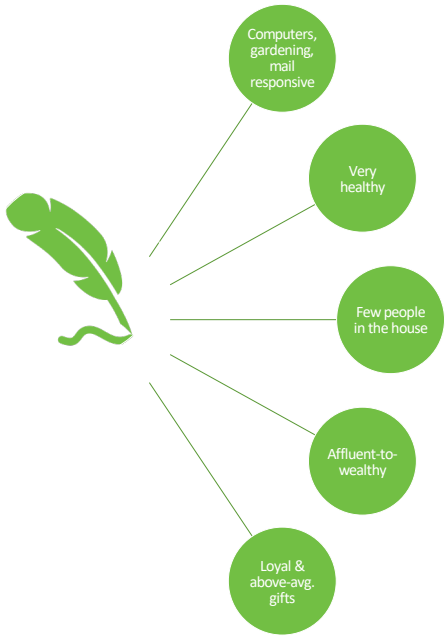
Around 2010
Updated the models with newly available Blackbaud and third-party EXTERNAL DATA

Mid-2010s
Moved data variables to the cloud, allowing for MACHINE LEARNING techniques

Now
Updated the models with 4 TIMES THE NUMBER of external variables from 2000

Bequest donor profile





Annuity donor profile

- Computers but not int'l travel
- Fewer transaction but larger purchases
- Smaller households
- Silent & Baby Boomer
- Loyal & above-avg. gifts

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CRT donor profile

- Silent & Baby boomer (some younger)
- Hold large amounts of public-record assets
- Spend on hobbies & specialty food
- Very healthy / use credit frequently
- Larger avg. gifts

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POLL

Do you have a long-term strategic plan using analytics for your planned giving program?

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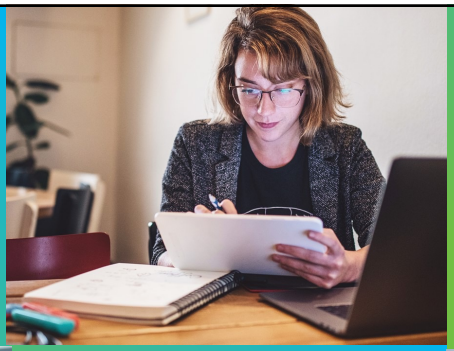
Prospect pools



Direct marketing

Resonate messaging

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POLL

Do you know where analytics are in your constituent relationship management database

(a.k.a. CRM)?

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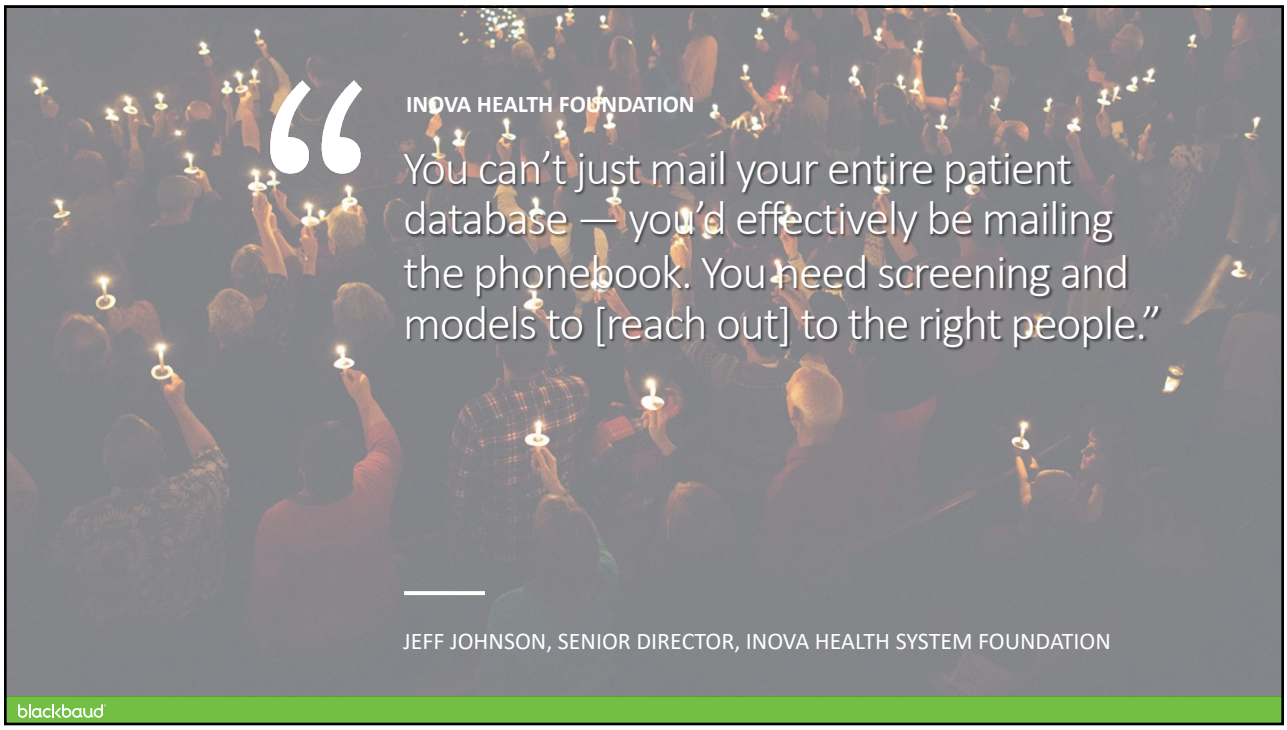

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Data segmentation

Use modeling SCORES

Cast the WIDEST NET here

Constituent lists

First name	Last name	Planned Giving Likelihood - WP	Birthdate	Classification	Estimated Wealth Rating - WP
THOMAS	GEORGENS	**977** 5/2/2018 Blackbaud Analytics - WP			**$10,000,001.00 - $25,000,000.00** 10/31/2019 Blackbaud Analytics - WP
DAVID	NELMS	**931** 10/21/2016 Blackbaud Analytics - WP			**$50,000,001.00 and up** 10/31/2019 Blackbaud Analytics - WP
WILLIAM	MOREAN	**926** 5/2/2018 Blackbaud Analytics - WP			**$0 and up** 5/2/2018 Blackbaud Analytics - WP
Timothy	Boyle	**923** 10/19/2018 Blackbaud Analytics - WP	9/1/1949 *70 years old*	Major Giving Prospect	**$50,000,001.00 and up** 6/23/2020 Blackbaud Analytics - WP
Timothy	Boyle	**923** 9/30/2019 Blackbaud Analytics - WP	9/1/1949 *70 years old*		**$10,000,001.00 and up** 9/30/2019 Blackbaud Analytics - WP
Lawrence	Probst	**876** 5/2/2018 Blackbaud Analytics - WP			**$25,000,001.00 - $50,000,000.00** 10/22/2019 Blackbaud Analytics - WP
Paul	Raether	**840** 5/2/2018 Blackbaud Analytics - WP			**$50,000,001.00 and up** 10/22/2019 Blackbaud Analytics - WP

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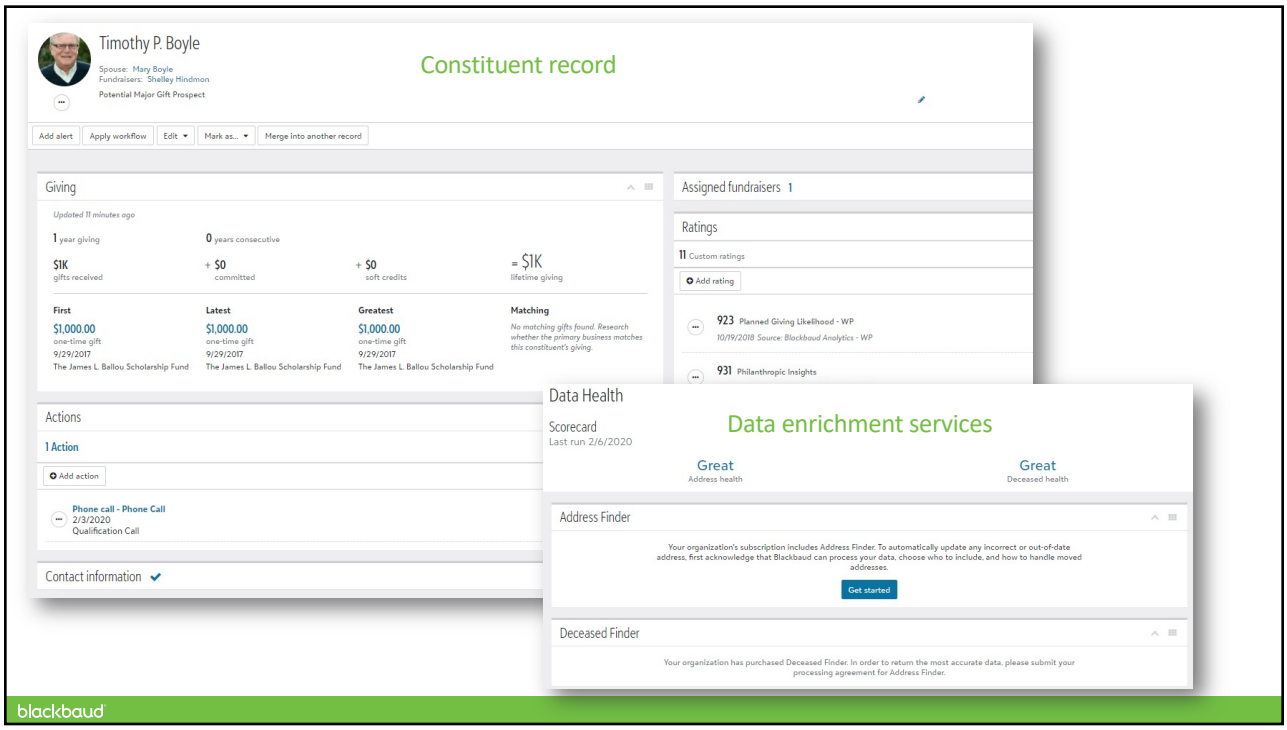

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Marketing analysis

Gift officer metrics

Blended gifts and capital campaigns

Download our white paper with expanded information

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In an unprecedented year… the best planned giving strategy is to reach a broader audience and implement thoughtful, sophisticated outreach…
[T]he sheer increase of new bequests… Plus, bringing in new planned giving donors will mean more individuals to steward into a lifetime of annual giving and engagement.

PATRICK SCHMITT - THE 2020 FREEWILL PLANNED GIVING REPORT

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What's on the horizon?

- HIGHER EDUCATION INSTITUTIONS
- K–12 SCHOOLS
- HEALTHCARE ORGANIZATIONS
- FAITH COMMUNITIES
- ARTS AND CULTURAL ORGANIZATIONS
- ANIMAL WELFARE
- DONOR ADVISED FUNDS
- I.R.A. DISTRIBUTION ROLLOVER GIFTS

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Additional Questions

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Thank You!

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