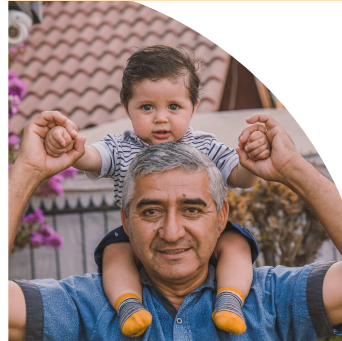


Donor stewardship: 3 effective steps to build relationships with legacy donors & confirm gifts



RESULTS

\$44M raised in gift commitments

600+ legacy donors



When we started making changes to reach out to our donors from FreeWill quickly, we got a much better response rate. The quicker we follow up on gifts, the higher chance we have to connect with our donors.

Pamela Leonard
National Executive Lead,
American Heart Association

In late 2018, the American Heart Association partnered with FreeWill to offer their donors a new, digital tool for estate planning. While they already had a long history of legacy donors and an effective stewardship program, they wanted to give their community the gift of free estate planning through their custom FreeWill site. They also signed up for a National Feature to expand their legacy program by capturing new donors. This places their organization front and center on FreeWill's public site as people make wills and trusts and choose to leave bequests.

To ensure FreeWill donors are effectively stewarded, they set up a step-by-step process to confirm gifts, thank donors, and cultivate relationships:

1. IMMEDIATE FOLLOW-UP ON GIFTS

AHA's team has found that the faster they follow up with their donors from FreeWill, the more likely they are to get a response and confirm the gift. Each week, they immediately reach out to the list of new donors that come from the FreeWill site. Their recipe for success is simple: thank donors for their gifts, ask how they'd like to be recognized, and answer their estate planning questions.

By offering appreciation and guidance, the team receives more positive responses and are able to confirm that these donors intend to leave a gift to their organization.

AHA STEWARDSHIP STATS

50%

Response rate from bequest donors on FreeWill

60%

Of confirmed bequest donors choose not to be anonymous

12+

Stewardship touchpoints sent to legacy donors per year



We only offer FreeWill to our “heart family” because it makes it a special gift for our donors. People have called and asked us if they could forward FreeWill to their loved ones, and this makes it feel like the American Heart Association has given a gift to their family as well.

Pamela Leonard
National Executive Lead,
American Heart Association

2. ORGANIZED MULTI-TOUCH PROCESS

The main reason why the American Heart Association is so effective at confirming gifts and stewarding their donors is because they follow a standard process with multiple touchpoints.

Touch 1: Automatically email their new donors to confirm their gift and schedule a phone call to get to know them.

Touch 2: If a donor doesn't respond to the email within 24 hours, AHA gives them a call after looking up their number on Whitepages. If a donor is having trouble executing their documents, AHA will even offer to find them a notary in their area or otherwise help with the last step.

Touch 3: By the end of the week, they send a card in the mail to each of their new donors, thanking them for their gift.

This process ensures that their team reaches out to every single donor, and rarely has to disqualify a gift.

3. STEWARDING EVERY DONOR

After a donor confirms their gift left through FreeWill (or doesn't respond to outreach for more than 30 days), AHA's team automatically moves them into their legacy giving society.

As legacy giving society members, these donors receive regular, personalized communications. These include birthday cards and holiday greetings, as well as opportunities to connect with the mission of the American Heart Association, such as invites to exclusive webinars and events. They are also asked to share their story and why they chose to give for inclusion in AHA publications.

This frequent, personalized contact makes these donors feel even more connected to the heart family, and builds meaningful relationships for years to come.

