



How to Compile a Planned Giving Mailing List

3 FACTORS

Listed below are the top three criteria to consider when fine-tuning your planned giving mailing list.

1. Loyalty

- a. Consider looking at everyone who has given for 15 consecutive years, regardless of age.
- b. Include all current planned gift donors.
- c. Include all former and current board members, staff, key volunteers, volunteer groups, owner/operators of McDonalds, capital campaign participants, and third-party centers of influence (attorneys, CPAs, clergy, bankers, estate planning council, corporate and business leaders, etc.).

2. Age

- a. Look at donors aged 40 and older who have made more than three gifts of any size. If you are trying to reduce your list size, consider further segmenting by loyalty and age (e.g., target donors aged 70-plus who have made three gifts and donors aged 40–69 who have made five gifts).

3. Recency of Giving

- a. Consider marketing to donors who have made five gifts, with one gift in the past three years.
- b. Don't forget about the "lapsed" donors, as they may have some loyalty to your organization but for whatever reason aren't giving annually anymore.

Periodically, consider casting a wider net (i.e., broadening your selection criteria) to pull in viable donors you might have overlooked.

If you want to target your mailing even further, consider breaking down your list in these ways (depending on available history in your database):

- » Donors aged 50-plus who have made 10 or more total gifts, including a minimum of at least two gifts in the past five years
- » Donors aged 40-plus who have made seven gifts or more in the past 10 years
- » All donors who have made 15-plus gifts, including one gift in the past three years (no age minimum)
- » All donors who have been "on file" for 15-plus years, including at least one gift in the past five years
- » All donors who have made at least one gift of \$1,000 or more, including one gift of any amount in the past three years (no age minimum)

Here are tips for honing your mailing list when marketing through electronic channels:

- » eMarketing campaigns—Another effective way to broaden your reach is sending eNewsletters to your donors and prospects. We recommend mailing to anyone in your database that is aged 40-plus with an email address. If you plan to segment your emails by age, we recommend creating three separate lists segmented by age as follows: 40–54, 55–69 and 70-plus.

For more information on how Stelter can help with your marketing efforts, please contact us at 855-703-3124 or shayna.zmolek@stelter.com.