The Value of Alumni Relationships

Identifying Planned Gifts Online

Visitors to Planned Giving Site by Grad Year

Grad Year	Percentage
1953	4%
1956	4%
1957	7%
1958	14%
1960	11%
1966	4%
1968	4%
1969	11%
1978	7%
1984	4%
1989	7%
1990s	18%
2000s	7%
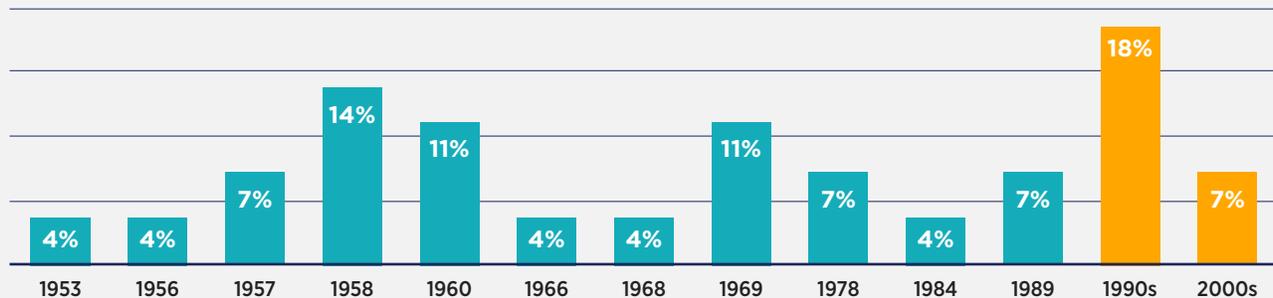
So much of planned giving is timing. Open the conversation too soon and it does not take shape. Reach out too late and decisions have already been made. By tracking individual visitors to university websites, Capture set out to find the "Goldilocks moment" to open the planned giving conversation.

The Process:

By identifying and monitoring alumni visiting across an institution's site – athletics, alumni association, academics, etc. – Capture Higher Ed. is uniquely able to match demographic data to individual visitors.

The Results:

Aggregating the last six months of behavioral data from across Capture's advancement division provides the first glimpse into how alumni behaviors online signal who is having the planned giving conversation *today*.

During the monitoring period:

- The equivalent of one percent of addressable alumni visited the planned giving site
- 10% of visitors identified on the site visited two or more times
- Average lifetime giving by an identified visitor to the planned giving website: $14,252
- Average age of an identified visitor on the planned giving site: 52
- **25% of identified visitors on the planned giving site graduated after 1990**

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What's Behind the Data?

Younger alumni on the planned giving site may come as a surprise. It is important to note there is no single uniting characteristic amongst this population, but we are in the largest generational transfer of wealth in American history. As a result, alumni will inherit wealth at different ages – another example of the individual nature of timing the planned giving conversation.

It is also important to note; after accounting for two outliers in the data, visits to the planned giving page represented only 20% of online behavior. Exploring the planned giving page can be a signal of readiness to have the conversation but it is only part of the equation. Tracking alumni behaviors across the entire institution's website is vital to identify specific points of affinity and open the conversation in a meaningful way – say an interest in entrepreneurship and athletics since they are active on those sites as well.

Tracking across the entire university domain also opens an additional consideration – older alumni with very high affinity. The chart below graphically represents alumni visit histories by grad year. By looking at the data this way, older alumni with higher affinity begin to emerge.

Identifying Older Alumni with High Affinity

The Opportunity:

The planned giving conversation is very personal. It is easy to infer that older alumni are more likely to inform an institution of a planned gift. However, the real opportunity is to be a part of the process – to form a meaningful relationship that draws the alum closer and increases their impact on campus. For every unsolicited planned gift received, we must consider the lost opportunity to show the alum what their impact could have been.

By identifying alumni visiting the institutions planned giving page and prioritizing outreach to older alumni with high affinity, an institution becomes a valued resource when decisions are being made. Only then can individual impact be maximized and the all-important stewardship process begin.