



## CASE STUDY

### AT A GLANCE

#### Fundraising Challenge

One of the country's most watched public media stations, New Mexico PBS reaches over 650,000 households each week, thanks in part to the support of 28,000 members. NMPBS sought to amplify its planned giving program in a way that aligned with its mission to inform, engage, educate, and connect New Mexico's diverse communities.

#### Opportunity

With membership pools steeped in giving longevity and frequency, public media boasts a deep well of prime planned giving prospects. Incremental improvements to local planned giving programs have the power to result in significant revenue gains. By providing a free, easy-to-use will building tool designed to encourage more people to create wills and estate plans, public media entities across the country will experience growth in legacy giving.

#### Approach

Giving Docs created a custom, branded landing page for the NMPBS audience to easily access its all-in-one platform, offered to supporters at no cost. Launched in January 2024 via a marketing campaign including digital, on-air, and program guide ads.



### BENEFITS

#### The complete package for one all-inclusive price

Giving Docs' all-in-one platform provides your audience with tools to write wills, codicils, health care directives, as well as options to facilitate gifts of stocks, securities, DAFs, and QCDs for one price. Donors are provided these tools for free for their lifetime as a gift from the station. Giving Docs takes data security seriously, complying with SOC 2 Type 2 standards and will never sell or rent donor data.

#### Built on behavioral science, powered by experts

Giving Docs' platform and marketing is developed with science in mind and written in plain english, ensuring more customers start and complete their plans, as well as easily understand the documents created. The team offers decades of experience in estate planning, planned giving, and public media to drive success throughout the partnership.

#### Know & steward your donors

Giving Docs boasts the highest gift disclosure rate in the industry, with 80% of users who include a legacy gift sharing their intentions with the nonprofit of choice. This provides organizations with the opportunity to celebrate and steward, increasing the likelihood that intentions will be realized.



## AT A GLANCE

## Campaign Overview

- Launch campaign included a series of 3 emails sent to an audience of 13,000
- Interstitials produced and aired consistently from launch to present
- Inclusion of Giving Docs in program guides

## Of note:

- Unique URLs relay campaign effectiveness – ongoing interstitials yielded 30% of account activations
- NMPBS' link to Giving Docs on its own planned giving site is the second greatest source of account creation
- January 2024 email marketing with a "new year's resolution" theme continued to drive visits to NMPBS' Giving Docs landing page through April

## RESULTS

JANUARY 1, 2024 - MAY 31, 2024

- Account Activations: 404
- Completed Documents: 112
- Handraisers: 41
- Completed Gifts: 17
- Estimated Value of Gifts: \$477,649

## Donor Composition Averages

- 83%\* of donors including a legacy gift to NMPBS disclosed their intention, giving the station's Development team the opportunity to recognize and steward, including admittance to its Evergreen Legacy Society
- Accounts created by people aged 30-80+, with legacy gifts to NMPBS included by all ages

## What's Next

A robust, multichannel campaign in tandem with National Make A Will Month in August 2024. NMPBS also intends to proactively market Giving Docs' Qualified Charitable Distribution tool before calendar year-end.

\*as of April 30



"By offering Giving Docs to our audience, we provide a service that aligns with our mission and encourages our viewers to easily consider a giving avenue they may not have otherwise. The Giving Docs team supports us every step of the way, providing expertise while being receptive to our station's unique needs."

-- Theresa Spencer  
New Mexico PBS