It Can Be Done!
SUCCESSFUL ANNUAL MAJOR GIVING PROGRAMS FOR HUMAN SERVICE NONPROFITS
BY
JAIME ABBOTT, SAFE HORIZON'S DIRECTOR OF INDIVIDUAL GIVING
Why Me? and Why This?

Jaime Abbott, MPA
Director, Individual Giving at Safe Horizon

Why?
Because this is something large and small organizations can and should do.
Because this is something that doesn’t take special knowledge/training.
Because it can be started in 3 steps.
How many of you have asked yourselves:

How do we increase our private revenue?

Or

We are so heavily funded by government, what happens if there is a recession or the government decides not to fund our work?

Or

We need repairs/supplies/etc. for our program, how are we to pay for it?
Why Individual Giving?

Many areas:

- Direct Marketing
- Events
- Annual Major Giving (AMG)
- Multi-Year Major Giving
- Campaign Giving
- Planned Giving

In 2017, Americans gave $410.1 Billion*

- $286.7 Billion was from Individuals (70% of all giving)*
  - $50.1 Billion went to Human Services Organizations.* (17% of all giving)
  - How much of the $50.1 Billion did your organization receive?
  - Average Gift Size: $2,514
  - How many donors do you have over $2,500?
- $35.7 Billion was from Bequests (9% of all giving)

In Total 79% of ALL Giving comes from INDIVIDUALS.

* Source: The Giving Institute: Giving USA, 2018
The Elephant in the Room...

- Individual Giving for Human Services Organizations is **HARD!**
- **Why?**
  - There is no built in audience for human services orgs.
  - We have to make an extra effort to connect people to our work.
  - We have to show that we are
    - not a government agency; and
    - more clearly define/reflect why government support doesn’t meet our needs.
- HSO’s primary revenue focus has historically centered on government and foundations.
Why should you have an AMG Program?

- Government and Foundation support is restrictive, individual support is largely unrestricted.
- Government support likes services, individual support likes results and impact.
- Government support is status quo, individual support is innovation.
- Government support for growth is “services” only, individual support is services, people, size, impact – everything and anything else.
What are the Pros and Cons to starting an AMG?

**Pros**
- Easy to set up with low/minimal costs.
- Revenue is majority unrestricted.
- Creates invested stakeholders.
- Growing revenue stream.
- Creates ambassadors.
- Forms a base for potential campaigns or multi-year giving programs.
- Flexibility and innovation are enabled.
- It’s fun and energizing for organization.

**Cons**
- Takes commitment – not a one and done program.
- Takes time – success doesn’t happen overnight.
- Takes energy – marathon not a sprint.
- Takes buy-in from multiple areas – Board, CEO, Executive Team, Program and Administrative Staff, Volunteers.
Step 1: DATA, DATA, DATA
Data – It’s Important

- The FIRST thing you have to do: Look at your data.
  - Clean it up and put in 1 place.
  - Is it up to date?
  - Then run lists:
    - How many donors currently?
    - How many donors over last 5 years?
    - How many donors have donated more than 10 years*?
    - How many LYBUNT?
    - How many newsletter and/or email subscribers?
    - How many volunteers?

* doesn’t need to be consecutive years.
Data – The Skinny

- Run Lists and Selectively Sort
  - Option 1: Find the Affinity
    - Consecutive Years Giving
    - Total Gifts
    - Years Donated
    - Last 3 FY Giving
  - Option 2: Size of Gift
    - Current Gift(s) at or over $x
    - Gift(s) at or over $x LFY
    - At any time gave a Gift at or above $x
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<th>FY13</th>
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Narrow Down and Strategize

Questions I asked:

- How many of these people are likely to respond to outreach – solicitation or cultivation?
- What is a manageable number to assign as Major Donor/Major Donor Prospect?
- What is the first step as an organization and what is the first step in my role I need to take with identified donors?

Answers:

- I have 87 with high affinity, they’re 80% likely to respond; 90 with moderate affinity, they’re 60% likely to respond; and 261 with low affinity, they’re 20% likely to respond.
- Take the top 177 (high and moderate) plus an additional 100 of top low – 277 Initial Outreach.
- Send them all something personalized.
Step 2

OUTREACH – PLAN AND TEST
Outreach – Intro Letter

Personal, specific with follow-through.

August 27, 2014

Name(s):
Address
Address
City, St., ZIP

Dear Name(s):

Greetings from Safe Horizon! We hope all is well with you, your family and friends.

We may not say this enough, but we at Safe Horizon really do appreciate your loyal and generous yearly gifts. It takes a special person to think so highly of our life-changing work, and you, Charles, are a very special person.

As the new Director, Individual Giving here at Safe Horizon, I have the very enjoyable job to meet with our most generous partners, like you. I would like to meet with you, briefly, at home or at work, just to learn more about your views of our work. I can share with you some updates on our upcoming projects at that same time.

I will contact you next week so that we can set a mutually convenient time to meet. Charles, I am very much looking forward to speaking with you.

Yours in service,

Jaime L. Abbott
Director, Individual Giving
(T) 212.577.7754
(C) 646.477.4013
Jaime.Abbott@SafeHorizon.org
Batch Solicit

- Upgraded Appeal (not direct mail)
- Personalized, hand-signed, on letterhead
- Personalized and hand-signed special correspondence (card)

- Defined Message
  - In-depth, special, something you cannot read off the website.
  - Story/impact driven, but not statistically packed.

- Defined ASK
  - Based on giving history:
    - $LFY  $LFY+10%  $LFY+25%

- Thank for continued support.
Plan
- Make a 1 Year Calendar
- Solicit 3 times:
  - Fall (CEO Letter)
  - Holiday (Card)
  - Spring (Special Letter)
- Cultivate
  - Calls/Emails Monthly
  - Tour Invites – Group and Individual
  - Quick Notes/Special Updates

Communicate
- Personalize
  - Always “Thank”
  - Directed to a Name
  - NOT run-of-the-mill
  - Insider Look
- Acknowledge and Ask
  - Thank, thank, thank
  - Ask: what are your thoughts on our program? Why do you support us?

Evaluate
- End of Year 1:
  - What’s your numbers?
  - What’s your response?
  - Survey – how donors felt?
  - What worked/what didn’t?
- Adjust, Plan Year 2
  - Add solicitations? Add cultivation pieces?
  - Remove solicitations? Change communication representative?
- Start again at the beginning.
Step 3

INVOLVE OTHERS
Involve Others – CEO and Exec. Team

▶ CEO
  ▶ Define expectations of CEO with major donors.
  ▶ Plan time weekly for CEO to call and thank major donors.
  ▶ Plan time weekly for CEO to cultivate major donors.
  ▶ Plan time monthly/quarterly for CEO and Team to strategize on major donors.

▶ Executive and Senior Team, Senior Program Administration
  ▶ Make sure they know what the goal of the new outreach program/plan.
  ▶ Ask for involvement – share client stories, share successes, etc.
  ▶ Define their roles within that plan.
  ▶ Train on how to communicate with major donors.
  ▶ Train on leading tours, presenting, meeting with major donors.
Involve Others - BOARD

- Board Involvement is Critical, and NOT Time consuming.
  - Board Solicitations
    - Letter or e-appeal to friends and family – you draft it and prep it (control the message), if possible, you send it (get the names for your database), you track it (know who’s donating to notify member), you thank (CEO), they thank (member), you place in your pipeline.
    - Ask to host event – home or smaller venue – all guests are theirs or they bring a couple and you invite major donors and prospects.
  - Board Cultivations
    - Ask Board to participate in “Thank You” Outreach – holidays, special months, other.
    - Ask Board to personally thank all their contacts who donate – notify them weekly/bi-weekly of gifts from their contacts.
Involve Others - Volunteers

- Share their story and involvement with friends and family.
- Solicit friends and family.
- Lead tours/information sessions.
- Allow their story/experience to be a solicitation/cultivation mailing.
- Be an ambassador by speaking about or representing the organization to the outside.
- Thank-a-Thons
What Comes Next?

1 YEAR, 5 YEARS…
Refine and adjust your outreach plan – calls, visits, emails, mailings, etc...

Plan more tours, meetings, regular touches.

Communicate with donors on their interests not just yours and not just for $ (they’re not a piggy bank).

Add cultivation events.

Add cultivation touches.

LISTEN to the donor – and LISTEN to the donor.
Safe Horizon 5 – Year’s In.

Committed to and launched an Annual Major Giving (AMG) Program in FY15 – resulted in high revenue growth, especially unrestricted revenue.

With an established AMG, Safe Horizon is positioned well for any future campaigns.

Our successful AMG has allowed us to take the next step – launching a larger Multi-Year MG initiative aimed at securing larger transformational gifts.
This is all nice, but

WHAT HAPPENS IN THE REAL WORLD?
Funny, Annoying, Depressing, What I Got in the Beginning.

Lots of Questions

Snide Remarks

Surprise & Gratitude
Questions you may receive internally

Individuals make up the largest portion of charitable giving nationwide, why is it such a small part of our organization?

We have a wide fluctuation in donations from individuals, and it really isn’t a large part of our budget, why should we bother?

We’ve been tasked with getting more general support by our leadership, and they keep saying “Reach out to Jeff Bezos, he’s rich.” What should I do?

We’ve never really had success with individual giving, our organization just isn’t of interest to them. Where can we find interested people to support us?
And some answers.....

- Why is it such a small part of our organization?

- Why should we bother?

- “Reach out to Jeff Bezos, he’s rich.” What should I do?

- Where can we find interested people to support us?

- Because for years the concentration’s been on the direct service funding of government – seconded only by foundations, then events, corporations and, finally, individuals.

- Because – it is the largest portion of charitable giving in the US – there is money there!

- Just because he’s rich doesn’t mean he’s interested – don’t chase the white whale when there’s a tuna at your feet.

- Your database – that’s where.
Any Questions?
Thank You

JAIME ABBOTT, SAFE HORIZON’S DIRECTOR OF INDIVIDUAL GIVING

JAIME.ABBOTT@SAFEHORIZON.ORG

LINKEDIN: WWW.LINKEDIN.COM/IN/JAIME-L-ABBOTT-A4A06A7