A Foolproof Recipe to Start a Successful Individual Giving Program

http://www.joangarry.com/individual-giving-program/?utm_source=JG+Newsletter&utm_campaign=7fa2589696-individual-giving-20160721&utm_medium=email&utm_term=0_40a7094ef4-7fa2589696-103736849

July 2016; Joan Garry Consulting Blog

When you work at a small nonprofit, or just a nonprofit with a very small development staff, life feels very rushed all the time.

Who posts on social media? You do.

Who updates the website? You do.

Who writes the appeals? You do.

And maybe you don't even have a development staff, and it's just you, the Executive Director, doing all the fundraising.

When that happens just getting out one or two appeals a year can feel like a monumental task.

But let's face it: sending out an appeal here and there with no planning or cultivation is not an individual giving program.

You are absolutely leaving money on the table.

Maybe a lot of money.

Depending on when you're reading this, perhaps the all-important holiday giving season is upon us. This is the time of year that so many people complete their charitable giving.

If so, it's time to make sure you're better prepared for next year.

But if there's still time before the holidays (and there are still four more months at the time I'm writing this), *this* is the perfect time to get going.

Four months is plenty of time to implement the bones of a successful individual giving program.

I'm happy to show you my easy recipe to get your individual giving program off the ground and ensure a very happy holiday for your organization.

STEP #1: MAKE YOUR LIST AND CHECK IT TWICE (JULY – EARLY AUGUST)

They say the money is in the list. It's true.

An organization's greatest asset as it begins an individual giving program is its email and snail mail database.

(Need to build a bigger list? Here's some specific advice on growing an email list.)

Before starting to cultivate and solicit anybody in a systematic way, take the time to thoroughly review your mailing list. If you haven't had time to implement a true individual giving program, you might not have taken the time to recently review your list.

You need to remove anyone who shouldn't be solicited through mail or email, but instead requires a personal solicitation. These names include:

- Government officials
- VIPs that you are cultivating for other purposes
- Anyone for whom a request for money without a personal ask would be inappropriate
- Donors that need personal attention for any reason.

I'll tackle what to do with the names you review in a future blog post, but for now just keep them to the side.

The remaining names are the basis of your individual giving program.

This list review is time-consuming, but unfortunately, it must be done. My suggestion is to block two hours in a staff meeting and do it as a group with one person dedicated to taking notes. The process can be more enjoyable when done with a group, and often the decision of who to remove from a list or who requires personal solicitation benefits from the group discussion.

STEP #2: SET YOUR CULTIVATION AND SOLICITATION CALENDAR (AUGUST)

A critical key to a successful individual giving program is a set calendar with plenty of cultivation, and set dates for solicitations.

Don't wait until the fall to put this together, set your communication dates in stone now.

If you are just starting a program, focus on cultivation (and soft asks) in August, September and October, and your full court solicitation press in November and December.

A sample calendar might look something like this:

Date	Topic
Second Week of September	Email or letter highlighting a key program and the benefits it provided to a client or other stakeholder
Second Week of October	Email or letter highlighting a personal story of someone assisted by your organization
Week of November 14th	First end-of-year solicitation
Tuesday, November 22nd	Email to full list saying thank you from your organization. No solicitation. Simple thank you emails can be very effective on their own in reminding people about an organization during the giving season (especially Thanksgiving week.)
Tuesday, November 29th	#GivingTuesday email solicitation (if your organization participates). (Though check out my thoughts on #GivingTuesday here.)
December 12th	Second year-end solicitation, text focused on work for next year
December 28th	Final year-end giving reminder (by email)

A few items about the emails:

- Keep them short and use bullet points. Each email should be no longer than a screen-and-a-half in length.
- Use pictures and videos to highlight clients and successes.
- Test all emails on mobile platforms.

Having your email calendar set in July will take the pressure off of deciding topics later in the year and will allow you to keep on task a lot more easily.

STEP #3: FOLLOW-UP (AUGUST – DECEMBER)

Once you begin sending out the cultivation and solicitation emails someone will need to be tasked with responding to prospect and donor emails.

It is critical these emails are responded to promptly.

Since staff is already stretched thin, an intern can absolutely be tasked with responding to emails, but they must be responded to.

STEP #4: DONOR THANK YOU CALLS (LATE DECEMBER – JANUARY)

Starting late December and into January, board members and senior staff should call and thank donors for their gifts. Donors love this and it goes a long way in retaining donors into the following year. Board members enjoy making these calls (for many, they're a lot more fun than making the ask itself) and doing so increases their connection to the organization.

STEP #5: EVALUATION OF PROGRAM TO DATE AND PREPARATION OF THE NEXT CALENDAR

Now that the year is over look to see what emails and letters garnered the biggest response — both in terms of gifts and feedback — and use this information to help plan your next communication calendar.

And congratulate yourself! You moved your organization from a catch-as-catch-can to a full-fledged individual giving cultivation and solicitation machine.

In my next post I'll talk about what to do with the people you found during your list review process that need more than a letter or an email – the start of your major donor giving program.

What other tips do you have for organizations that are just starting out? I'd love to hear them in the comments below or on our Facebook page. You are participating with us on Facebook, right? <wink>

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