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Individual Giving Trends and Your Nonprofit's Development Plan

By: Rick Cohen

It seems that almost every day, we read a new report about the state of individual giving. Among the recent highlights are:

- Various sources showing a “[decline in the participation and amounts donated by ‘small’ and ‘medium’ donors](#)” during the last 14 years (for which data exist);
- [Charitable Giving Around the 2016 Election: Does Gender Matter?](#), by the Women’s Philanthropy Institute at Indiana University, investigating trends in giving before and after the 2016 election; and
- the Fundraising Effectiveness Project, [comparing giving last year versus this year](#) and revealing – so far in 2018 – a decline in the number of donors and the amount contributed.

Keeping an eye on trends can inform the work we do, but real-world experience will differ for each nonprofit. Some nonprofits will see decreases in giving this year, while others will celebrate record years. Regardless of the broader trends, each nonprofit needs to have its own plan thoughtfully aligned with its mission and the people who support it. As we like to say, “Have a plan, work the plan, evaluate and adjust the plan, repeat.”

Have a plan

If individual donors are an important element of your nonprofit's business model, then you may be ramping up for your end-of-year appeals right now. Simultaneously, you may be preparing your 2019 development plan. Many nonprofits are thinking about how to decrease reliance on the last three months of the year. [Plans that are year-round](#), not just centered around the holiday season, the end of the tax year, [#GivingTuesday](#), or a local giving day, will be of increasing value as the effects of the new tax law filter through. A message sent in May to share a story of how a past donation made a difference may turn out to be ideally timed for a particular donor and more effective than an appeal that's one of dozens that donors receive in late November through December.

Work the plan

A plan that sits on the shelf gathering dust isn't worth the time spent writing it. It needs to be put into action to be successful. As Wayne Gretzky said, "You miss one hundred percent of the shots you don't take."

Try to include "SMART" goals (Specific, Measurable, Actionable, Relevant, and Time-Bound) in your plan and have some kind of system in place to revisit the goals regularly and adjust as needed. If the plan calls for sending out monthly or quarterly updates to supporters, be sure those updates go out. If it calls for a special fundraising event, ensure you are taking the needed steps with plenty of lead time to ensure a successful event. If board members volunteer to [help out as ambassadors](#), discuss tactful ways they can hold each other accountable for those commitments.

Evaluate and adjust the plan

The best plans are not written in stone. Plans should have the flexibility to evolve according to what you learn throughout the year. Changes can be as simple as tweaking messages based on how successful a certain appeal is. Have you tried using [A/B testing](#) to refine your messaging? In evaluating your plan, think about how your nonprofit is communicating with past, current, and prospective donors. If donors have expressed interest in a particular program, are you keeping them

informed about its progress? Have you considered [reaching out to lapsed donors](#) to learn from them? If your development shop is small (or non-existent), you may be able to evaluate only a few aspects of your plan each year – but those assessments can produce significant results.

Repeat

Once any adjustments are made, keep working the revised plan. Does the plan include expanding fundraising efforts into new states? Don't forget to stay up-to-date on [charitable solicitation registration requirements](#).

Most importantly, don't forget to [thank your donors](#) and help them see the impact of their contributions. Board members can make a huge difference by calling donors to thank them personally. In a recent interview with *The Chronicle of Philanthropy*, the founder and CEO of Charity: Water, Scott Harrison, [shared a strategy we all can learn from](#): “We celebrate our donors. ... [W]hen we can show the 8-year-old where her \$6 specifically went, showing her photos, and the GPS coordinates and a satellite image of a well that her \$6 contributed to, we believe that we're igniting a virtuous cycle of more giving.”

So, what's your nonprofit's plan for engaging donors in 2019?