



## Acknowledging Cumulative Giving

BY GAIL S. MELTZER, CFRE

**M**y charitable giving began in the 1970s through responding to direct-mail appeals. I've been contributing annually to several groups for more than 30 years, and while my annual gifts have not been huge (mostly in the \$25–\$50 range), they have been consistent for three decades. So why have these organizations never acknowledged my cumulative giving over so many years or contacted me outside of direct mail?

It seems I am invisible to them—simply another of the hundreds of thousands of donors who cycle in and out, usually introduced through a direct-mail appeal. I have never stopped giving, yet after all these years they know absolutely nothing about me. Consider the following:

- I'm incredibly loyal, even though my years of giving are never mentioned.
- I'm low-hanging fruit! I'm 30 years older now and have been gainfully employed my entire adult life. I'm now a member of the cohort of excellent planned-giving prospects.
- I live in a major metropolitan area where I'm sure many other donors to these organizations live. If they sent someone once a year to our area and invited us to a get-together, I bet we would attend. They could tell us how our contributions are making a difference and bring us much closer to the organization. If this is happening, I haven't been invited.
- I've been giving unrestricted gifts at the same level all these years. Maybe I could be persuaded to support specific projects at a higher level if I were made aware of such opportunities.

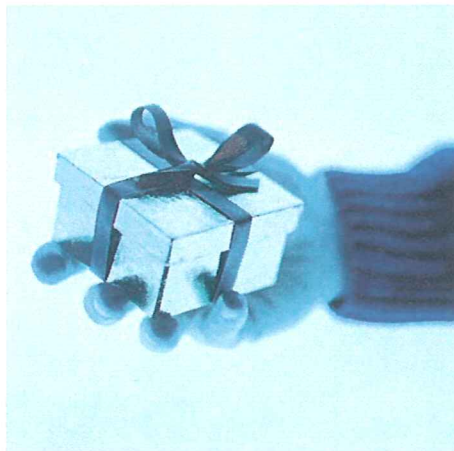
To learn more, I called and spoke to a development director and a gift planning officer at two of these groups. What did I learn?

- Each group has about 1 million active "members." Of that million, an amazing 150,000 are like me—small-gift donors who have been supporters over decades.
- They don't calculate or acknowledge our cumulative giving because staff resources are limited and they are tasked with engaging only donors who are already giving major gifts or have been identified through wealth screening as having that capacity.
- The fund development function has been computerized for only about 15 years. Staff I spoke with had no idea where gift records prior to the 1990s were kept, so even being able to accurately reflect a lifetime of giving would be difficult.

- Thoughtful, strategic discussions around why and how to build relationships with donors like me are just beginning to take place in one group, and have yet to happen in the other.

Steadfast, loyal, long-term donors deserve better. Here are some suggestions for an organization of any size.

- **Talk about us!** Don't ignore us in your major-gift/planned-giving program discussions. Here we are right under your noses, and often you are focusing your attention on pie-in-the-sky prospects who may never even give you the time of day.
- **Call and thank us!** Even if you don't know exactly how long or how much we have given because your computer records go back only so far, you can still call and thank us for what you *do* know, explaining why your records may not be complete. (What a great activity for board members.)



- **Find out what our interests may be** within the parameters of what you do. Give us an opportunity to designate our gifts to specific programs and you may see a substantial increase in our giving.
- **Tell us how we matter**, even though our gifts may be relatively small. If we don't think our financial support makes a difference in your efforts to change the world, it is easy for us to walk away from you—even after all these years.
- **Help us see ourselves as possible donors of a legacy gift.** We may not realize that a planned gift may be appropriate for us. However, don't just mail us generic planned-giving material.

- Give us stories about people just like us who are now making planned gifts. Call us before you send us materials like this; let us know you appreciate our long-term loyalty and that you hope we will consider a legacy gift when we receive your materials. We would then be less likely to just throw them away.
- **Ask our opinions.** Give us an opportunity to share our wisdom with you, but only if you are really interested in what we have to say. You may be surprised how much we have thought about what you are doing over these many years and how relevant our ideas and suggestions may be.

We all know that it is more costly to acquire a new donor than to keep and upgrade an existing one. It is never too late to try to revitalize a long-term relationship, especially if the effort is sincere. No excuses—get on the cumulative-giving thanking train today! The rewards may be truly remarkable. 🎁

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