



DOGGED DETERMINATION

HOW ATHENS HUMANE SOCIETY LANDED \$2.2 MILLION IN GIFT COMMITMENTS IN A FEW SHORT MONTHS

When Cheryl McCormick took over as the leader of Athens Humane Society, she quickly ran into a common dilemma faced by many small to mid-size nonprofits.

Cheryl had big plans to expand the Georgia organization’s mission to help as many dogs, cats and other pets as possible find forever homes, but the nonprofit lacked a formal Planned Giving program to consistently generate long-term funding to support growth and fortify the shelter against a potential crisis.

That meant Athens Humane Society’s board and team only learned of occasional bequests after a donor died. There was no visibility into what planned gifts were in the pipeline – or opportunities to thank the donors for their generous commitments.

“Planned gifts came in like most do – accidentally – without an opportunity to thank the donor or to explain the significant impact of their gift,” Cheryl laments.

Cheryl knew enough about Planned Giving to understand that a huge opportunity was going to waste. She envisioned a donor-centered program focused on how donors want to be remembered through their philanthropy. And she wanted to find authentic ways to frame donor conversations so that they didn’t dwell on death, but rather on the lifelong impact of a legacy gift.



Yet she was left with a nagging question: What is the quickest path to success?

BARKING UP THE WRONG TREE

The question was a tricky one, as Cheryl had been bitten before. Several years prior, she had enrolled in a costly class focused on Planned Giving. Unfortunately, she did not get the bang for her buck.

“In my cohort, there were a lot of large institutions, hospitals, universities and veteran planned gift officers,” she says. “So, it was just not the appropriate course for a fundraiser at a small- to mid-size shop, wearing a lot of hats, who really wanted to connect on a personal level with donors.

“My dream of what I wanted to get out of that course was the more personal, relational aspects of Planned Giving. I wanted to learn how to have the conversation about a profound gift and how life changing it can be. I wanted to learn how to create a donor-centered way of explaining the impact of a legacy.”

When she arrived at Athens Humane, Cheryl revived her dream. And she found the way to fulfill it: Planned Giving Accelerator.

FROM DREAM TO REALITY

Cheryl is a long-time listener of Tony Martignetti Nonprofit Radio. When she heard Tony talk about his vision of making Planned Giving affordable and accessible to smaller nonprofits through a new program called Planned Giving Accelerator, she had a strong hunch she had found her answer.

“When I saw the Accelerator come through, I knew right away that it would add significant value,” Cheryl recalls. “I knew that it would really hone my ability to connect with my donors and build a pipeline to bring them closer.”

Going into the Accelerator, she was confident Athens Humane Society had the foundation for Planned Giving success – a strong pool of committed and engaged donors. Within a month of weekly meetings in Planned Giving Accelerator, Tony had guided Cheryl step-by-step through mining her organization’s CRM to identify donors who were strongest candidates for a planned gift.

“Based on the first couple of conversations with Tony, we were able to sort out 80 Top Tier candidates,” she remembers. “And I reached out to every single one of them.”

FAST RESULTS AND A LONG-TAIL PIPELINE

Building on that initial outreach, Cheryl has secured several gifts since starting the Accelerator. Those gifts total \$2.2 Million.



Planned Giving Accelerator is a game changer.”

-Cheryl McCormick, Ph.D.
CEO Athens Area Humane Society

Further, Athens Humane Society is now tracking one bequest per month.

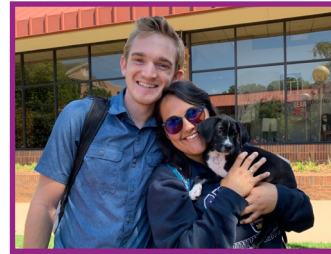
“In a few short months, Planned Giving Accelerator dramatically changed the trajectory of our organization,” she says. “We are now able to budget and plan for the future in ways we never could have imagined. Plus we get the added benefits of connecting with key donors in meaningful and lasting ways.

“Tony knows his niche market,” Cheryl says. “He knows what we need, and he tailors his courses on the conversation. He also knows how important it is for nonprofits to create relationships among peer professionals and to have that dynamic lead.”

Cheryl has found that an unexpected benefit of Planned Giving Accelerator has been the ability to build relationships with peers from other nonprofits with a variety of missions ranging from environmental activism to the arts.

Instead of the traditional webinar or classroom approach where an instructor talks and the students passively listen, Planned Giving Accelerator opens a safe virtual space for members to vibrantly share experiences and stories as others learn from their successes, generously brainstorm challenges, and build lasting bonds.

“The peer-to-peer learning and networking opportunities have been extremely valuable,” Cheryl explains. “My advice to any fundraiser is don’t waste another year wishing you had an effective planned gift program in place for your nonprofit. Planned Giving Accelerator is a game changer.”



Visit us online to learn more about Planned Giving Accelerator.

