



# **Impact of Hurricane Harvey on Fundraising in Houston**

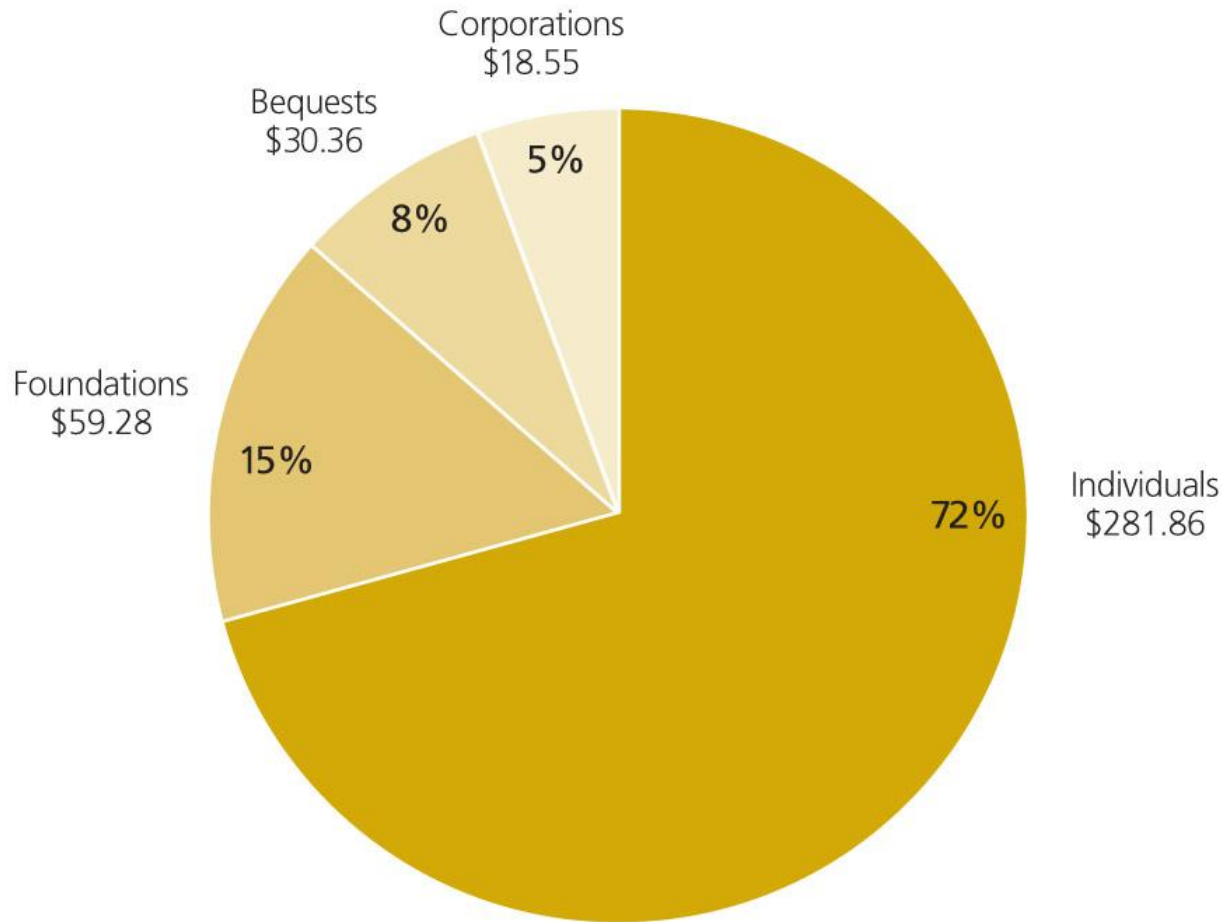
Conversation with the Planned Giving Council of  
Houston

December 7, 2017

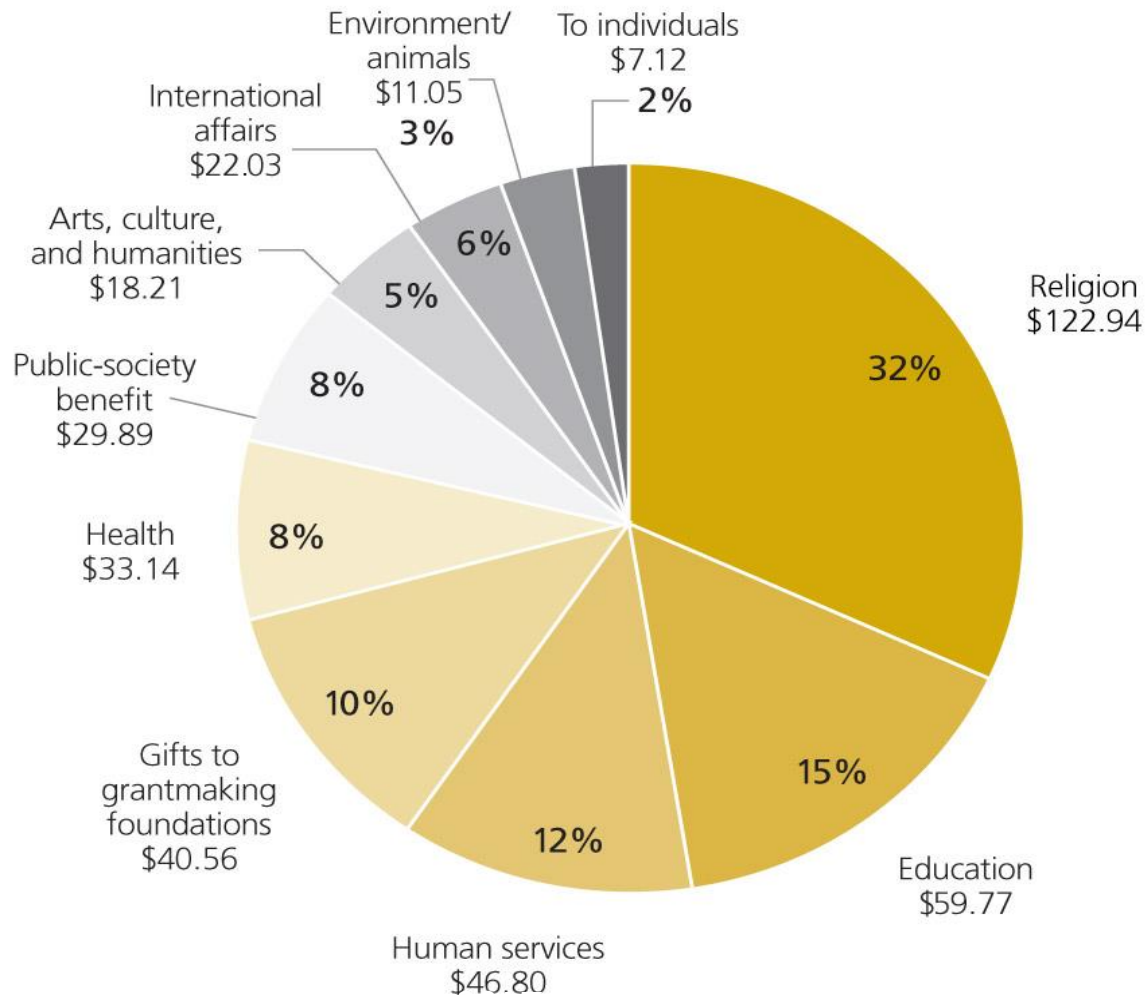


## NONPROFIT CONTEXT

# 2016 contributions: \$390.05 billion by source (in billions of dollars — all figures are rounded)

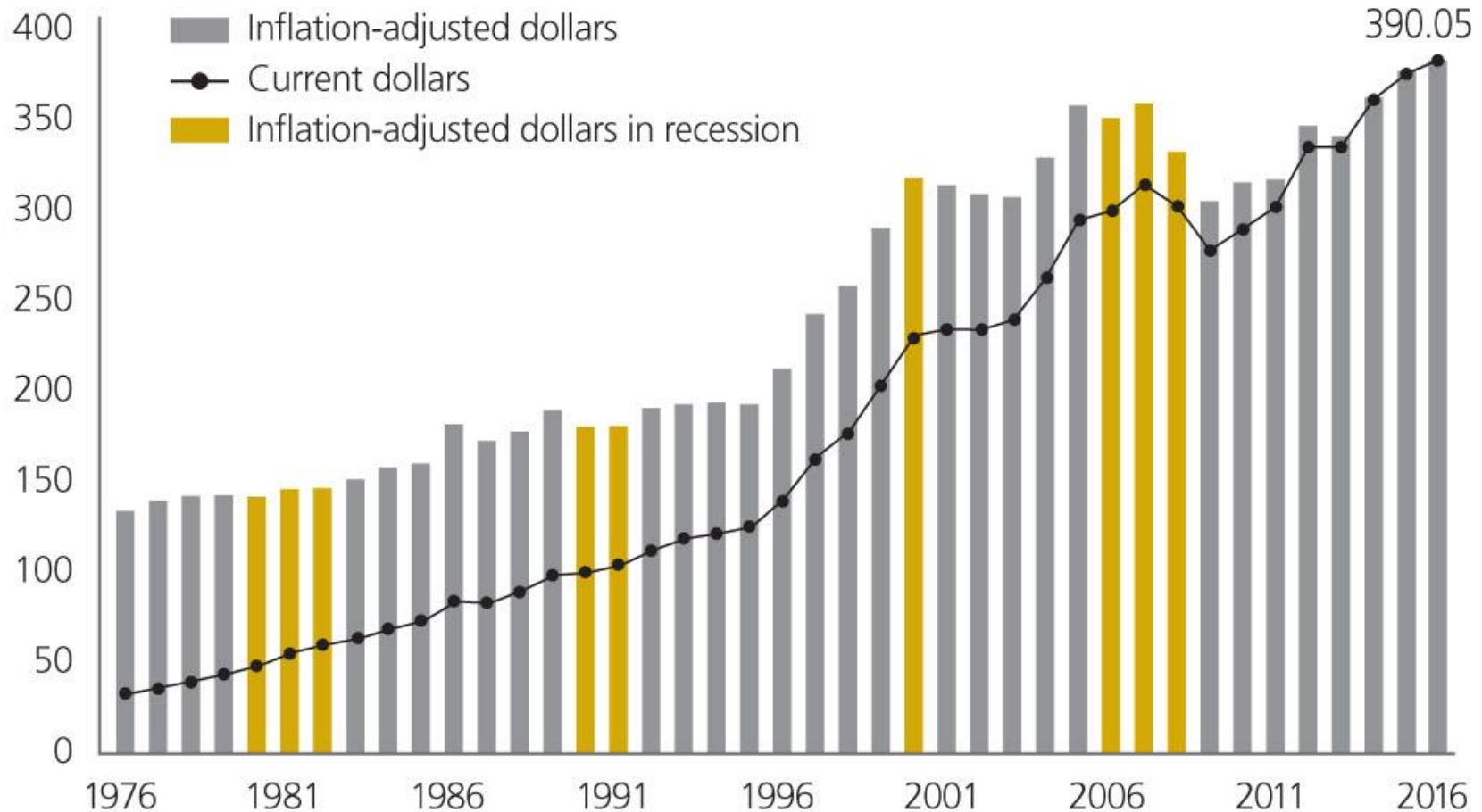


# 2016 contributions: \$390.05 billion by type of recipient organization (in billions of dollars – all figures are rounded)



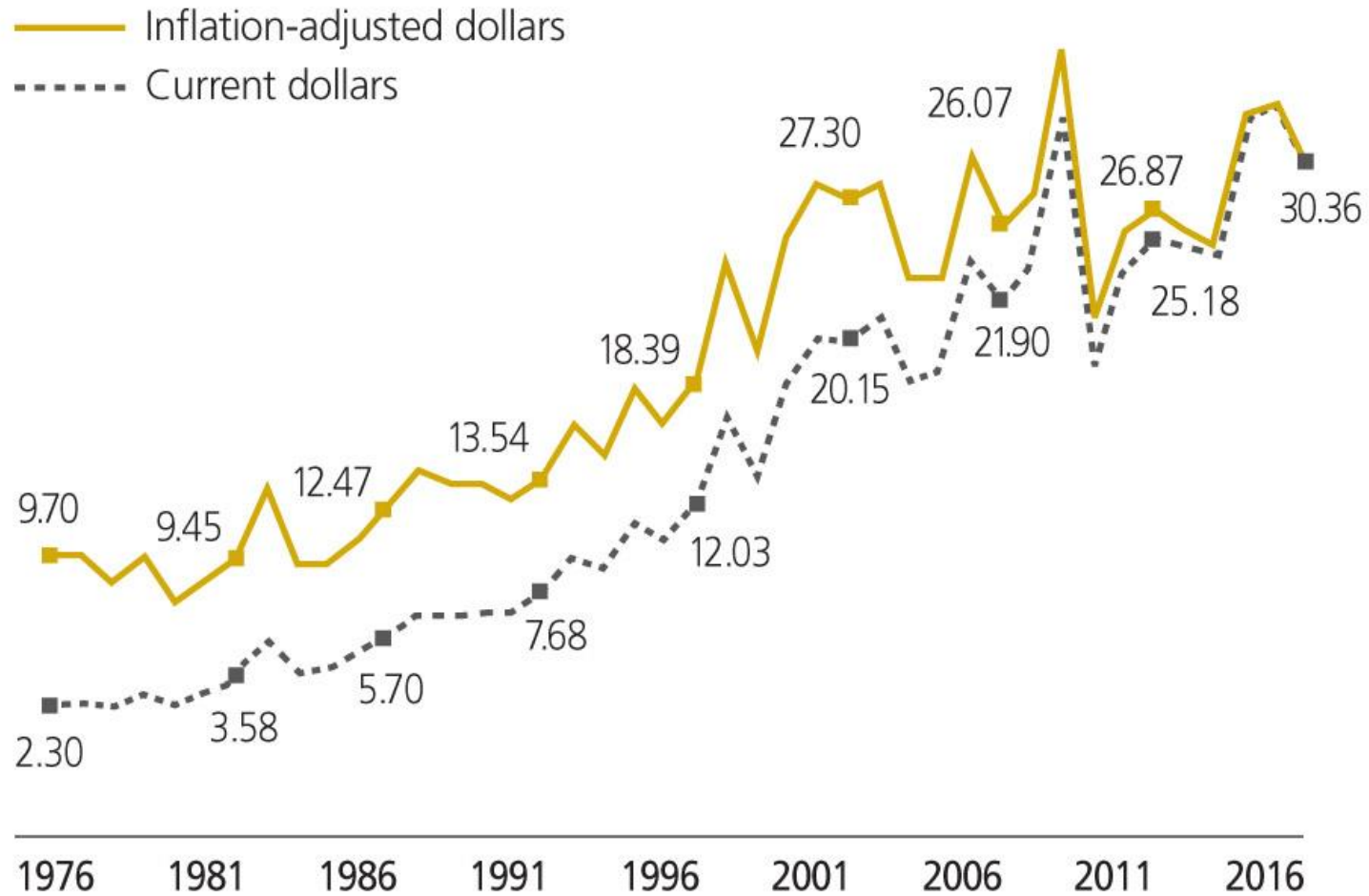
# Total giving, 1976-2016

(in billions of dollars)

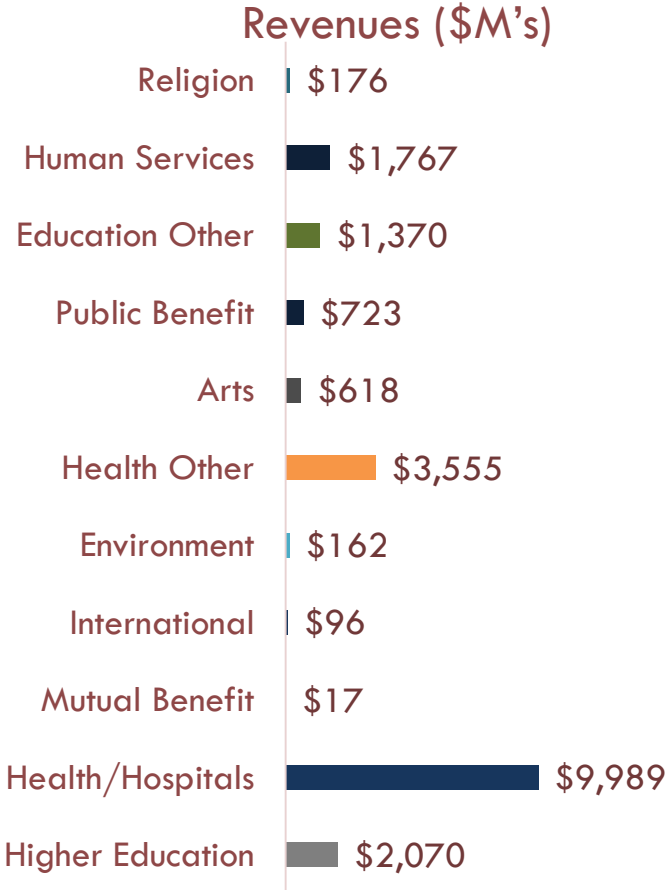
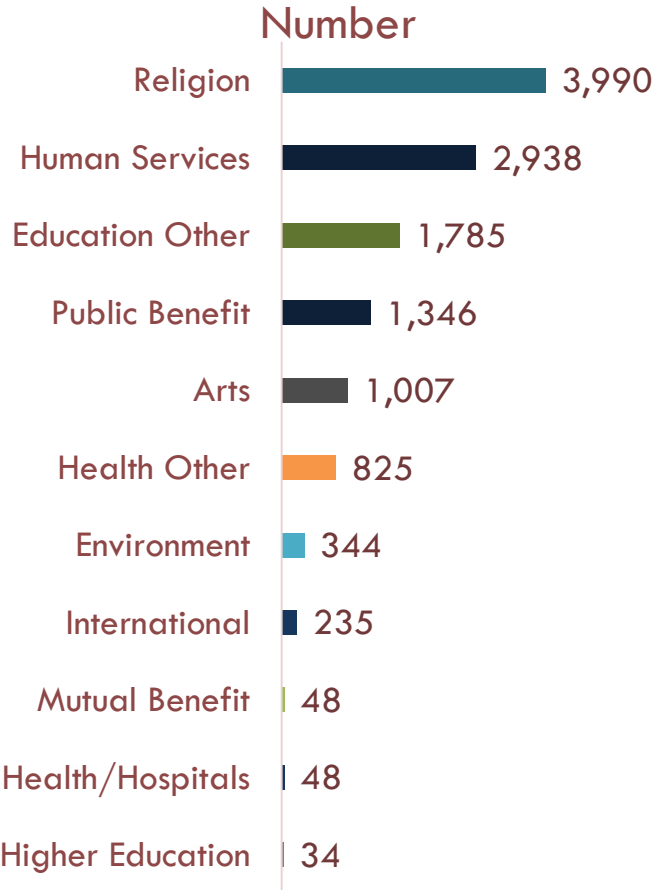


# Giving by bequest, 1976-2016

(in billions of dollars)

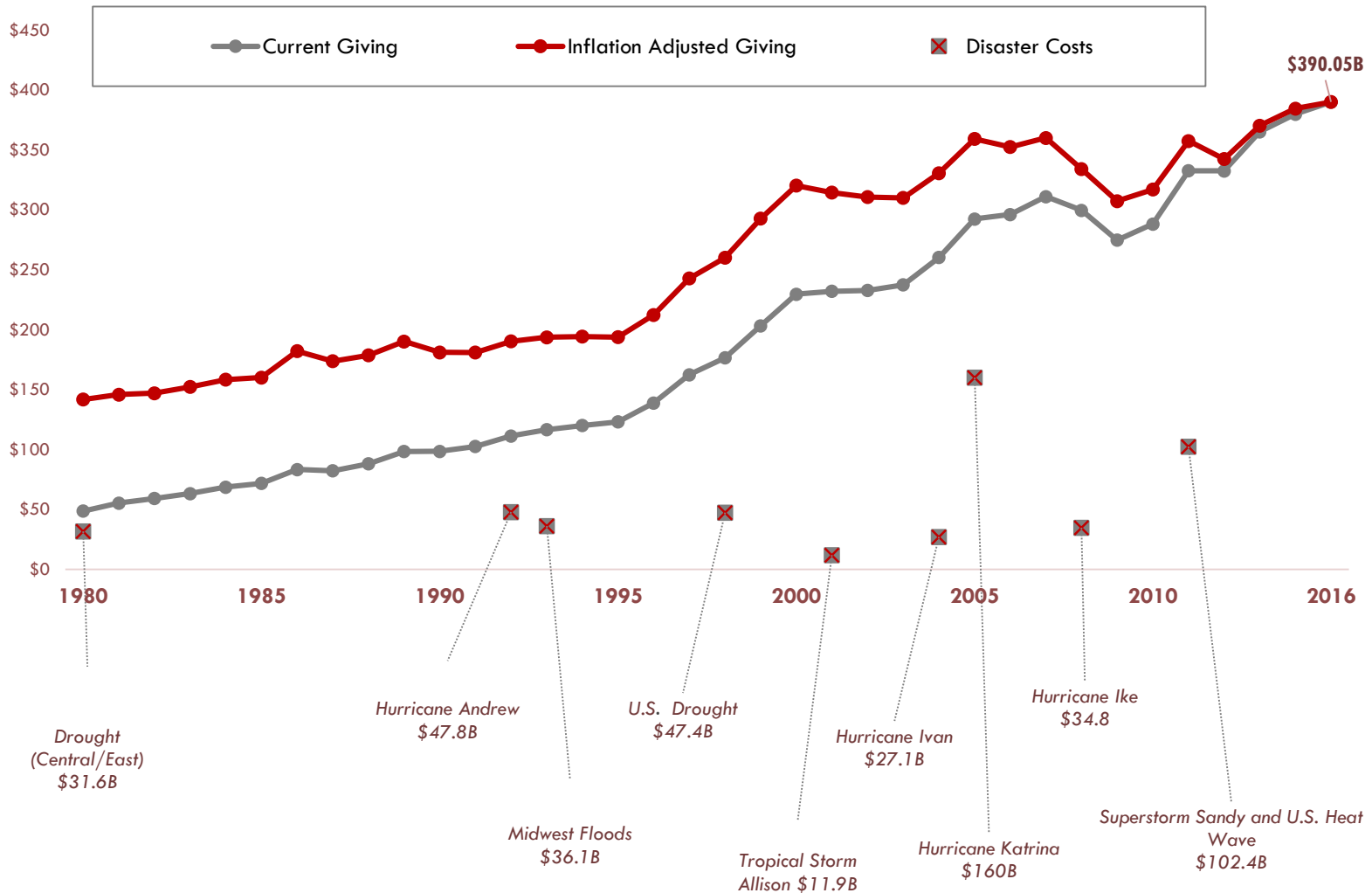


# Houston Area Nonprofits by Sector



# Charitable Giving and Costly National Disasters (in Billions)

Charitable Giving and Disaster Costs (in Billions)





# Harvey Impact – Short Term

- Nonprofit sector a vital part of recovery
- Many relief funds established
- Significant regrouping within organizations to assess
  - Programmatic and financial impact
  - Adjustments to mitigate impact
  - Best donor communications and retention
  - Contingency fundraising plans
- Limited shifting of dollars

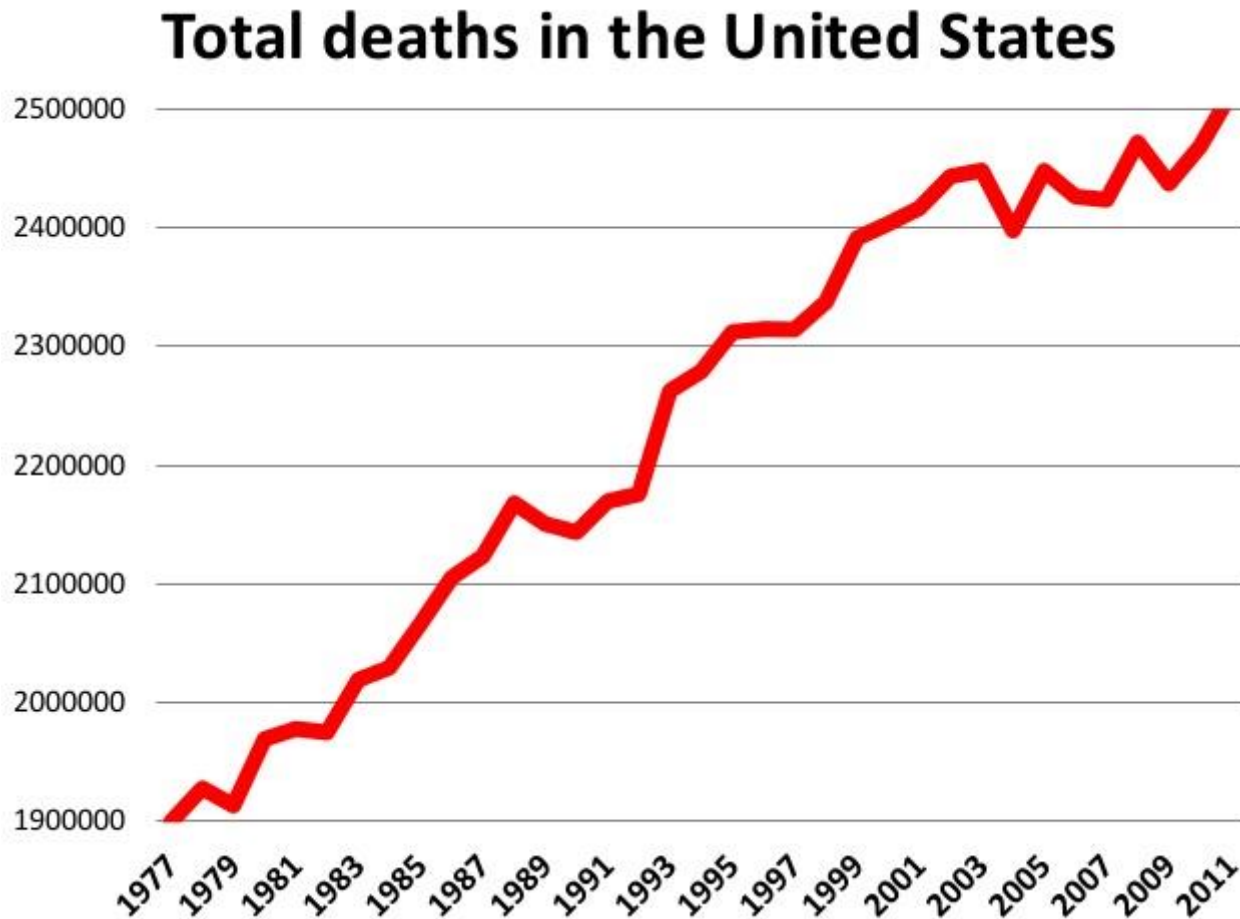
# Harvey Impact — Long Term

- 3-year horizon
- Pressure on health and human service organizations
- Unknown gaps to be filled
  - Capital
  - Operating
- Greater impact on small organizations and those without strong major donor programs

# Impact on planned gifts

- Limited negative impact – or no impact
- Profile of bequest donors unchanged
- Short-term crises generally don't change long-term plans

# People are still aging and passing



# Considered Factors — Planned Giving Profile

- Number years giving
- No offspring
- Female
- Wealth
- Unmarried
- Recency of giving
- Growing or stable net worth
- Volunteerism

# General Advice

- Continue planned giving programs
- Be patient if donors are distracted over short term
- Make your case more strongly than ever, emphasizing long-term picture
- Hunker down if you're in the arts
- Renew or update your strategic plan

# Fundraising Advice

- Take care of long-term donors
- Focus on *stewardship*; planned gift is the long play

# Thank you!



Kimberly Sterling  
Sterling Associates  
55 Waugh Dr., Suite 601  
Houston, TX 77007  
P 713.807.1411