Lessons Learned: Fundraising During COVID-19

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Moderated by:

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Fundraising Academy
FUNDRAISE

YOU’VE GOT A CAUSE. LEARN HOW TO FUND IT.
Our Affiliate Partners

- National University System (Founding FA)
- City University of Seattle (WA)
- Long Island University (NY)
- Texas A&M University Central Texas (TX)
- Iowa Wesleyan University (IA)
- St. Augustine College (IL)
- Candid (OH)
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- Kentucky State University (KY)
- Texas A&M International University (TX)
- Xavier University of Louisiana (LA)
- First Tee (FL)
- Nova Southeastern University (FL)
- Maricopa Community College District (AZ)
- Candid (CA)
- National University System (Founding FA)
- First Tee (FL)
Sharyn Goodson, CFRE

Vice President, Philanthropy
Leichtag Foundation

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POLL: Tell us about yourself!

How many years of fundraising experience do you have?
“You can’t connect the dots looking forward; you can only connect them looking backwards.”

- Steve Jobs
- Connections & partnerships are critical
- Maintain donor contact no matter what
- Case for support is different now
- Virtual meeting & events are here to stay
- Get educated on planned giving

Lessons Learned
LESSON #1

Connections and partnerships are critical and we need to work harder at them now.
Connections during COVID

• No opportunity for spontaneous interactions
• Can’t take communications for granted
• Plan for work conversations, brainstorming, breaks
• Online networking opportunities
Collaborations are key

- A time of unprecedented partnerships
- Shed competitive energy; there are enough resources
- Magnify impact by working together
- Find ways to partner other than direct programming
  - Co-author an article
  - Joint community education and/or fundraising
  - Shared back-office
Lesson 1: Connections and Partnerships

Share your stories and questions!
LESSON #2

Maintain donor contact *no matter what!*
Donor contact

• Relate personally, with empathy & transparency

• Use phone or talk in-person online.

• Person to person conversations = 47% increased giving

• Meet donors where they are - easy software and/or phone

• Invite the family

• How can you help?
Deepen donor relationships

• Ask about their background **every time you talk**
• Why your **cause and organization**?
• What prompted their **first gift**?
• How has giving **impacted their lives**?
• What could we do better?
• **Track all data** & send note of thanks for meeting
COMMUNITY SHARE

Share your stories and questions!

Lesson 2: Donor Contact
Missions don’t change but *cases for support likely did...*
Case for support

• Reflects greater relevance and urgency
• Crisis prompted innovation & experimentation
• Why is your organization needed and why now?
• Are there new priorities?
• What needs remain critical?
• Keep your message relevant with compelling and current stories
COMMUNITY SHARE

Share your stories and questions!

Lesson 3: Case Support
Virtual meetings & events can be productive. And they are here to stay
Tips for Virtual Donor Meetings

- Easy to join with browser-based platform
- Connect with click of a button
- Good headset/microphone
- Quality camera & light front of face
- Professional setting without distractions
Tips for Virtual Donor Meetings

• Practice and send agenda ahead of time

• Invite participation & questions

• Don’t have advantage of nonverbal cues
  - at least 50% of communication

• 45 minutes max
Body language

Smiling, engaged, looking at donor

Looking at own image

Someone walked into room

Opened a website, no longer listening

Completely out of conversation
Virtual Events: What do donors want?

- Connections! To **staff, volunteers, other donors, clients**
- Convenient **time**
- To feel **valued**
- Learn **how gifts are used**
Virtual Events: Give them what they want

- Acknowledge every donor’s presence
- Donors at the center of experience
- See donors and let them see others
- Make it personable before, during, and after
- Want donors to log off saying: “So glad I joined; it was important to be there!”
Virtual engagement
Lesson #4: Virtual events & meetings

• Were **eliminated or replaced plans** missed?

• **Was savings** realized or were **revenues** increased?

• **Was event attendance impacted?**

Share your stories and questions!
Get educated on planned giving
Planned giving is having a moment

- COVID-19 prompts donors to contemplate legacies
- Number of wills created & updated sores
- Planned gift sizes increased or fulfilled early
- Response rates have grown for planned giving communications
- Next 20 years trillions of dollars to be passed from baby boomers to next generation
COMMUNITY SHARE

Share your stories and questions!

Lesson 5: Get Educated on Planned Giving
"Everything will be okay in the end. *If it's not okay, it's not the end.*”

- John Lennon
Fundraising Academy
WEBINAR SERIES

Upcoming Webinar:
May 19, 2021
11:00am-12:30pm PST | 2:00pm-3:30pm EST

What to Ask and When To Ask It
QUESTIONS?

Send them through the chat!
CONTACT
SHARYN:
sharyn@leichtag.org
THANK YOU

TAKE YOUR CAUSE AND
CREATE IMPACT.
THE NON-PROFIT TECH UNIVERSE

Donor database
- Blackbaud
  - The Raisers Edge
  - Altru
  - ETapestry
- Donor Perfect
- Salesforce
- Abila/Sage

Peer to peer
- Classy- www.classy.org
- Just Giving Blackbaud P2P- www.blackbaud.com
- Rallybound -www.rallybound.com
- Everyday Hero

Event
- Eventbrite

Membership/Ticketing/Performing Arts
- Daxco
- Altru

Auction
- Auctria
- Greater giving

Volunteer
- Volunteer hub
- Volgistics

Prospect Research
- Lexus Nexus
- Alumnifinder- www.Alumnifinderonline.org
- Wealth Engine - www.Wealthengine.com
- CARA-California Advancement Researchers: https://caresearchers.org/
- Target Analytics
# PLANNED GIVING

## Resources

<table>
<thead>
<tr>
<th>Professional Networking Resources:</th>
<th>Technical: Software/Planning</th>
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<tbody>
<tr>
<td>San Diego Planned Giving Partnership:</td>
<td>PG Calc: <a href="http://pgcalc.com">pgcalc.com</a> — Also a great resource for webinars &amp; Marketing</td>
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<tr>
<td>AFP San Diego Chapter:</td>
<td>Crescendo: <a href="http://crescendointeractive.com">crescendointeractive.com</a> — Also a great resource for webinars and marketing</td>
</tr>
<tr>
<td>North County Philanthropy Council:</td>
<td>National Association of Charitable Gift Planners:</td>
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<tr>
<td>North County Philanthropy Council:</td>
<td><a href="http://charitablegiftplanners.org">charitablegiftplanners.org</a> — CGP Link Online Community, National Conference on Planned Giving and many other resources</td>
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<td>The Hive: <a href="http://leichtag.org/the-hive">leichtag.org/the-hive</a></td>
<td>Miscellaneous:</td>
</tr>
<tr>
<td>Marketing Resources:</td>
<td>IRS.gov</td>
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<tr>
<td>Stelter: <a href="http://stelter.com">stelter.com</a></td>
<td>American Council on Gift Annuities: <a href="http://acga-web.org">acga-web.org</a></td>
</tr>
<tr>
<td>PlannedGiving.com</td>
<td><a href="http://Legacy.com">Legacy.com</a> — for obituaries/decedents</td>
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<tr>
<td>Pentera — <a href="http://Pentera.com">Pentera.com</a></td>
<td>Planned Giving Design Center: <a href="http://pgdc.com">pgdc.com</a></td>
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