

fundraising academy

CAUSE SELLING EDUCATION



Wednesday, April 21, 2021

Lessons Learned: Fundraising During COVID-19

Moderated by:



Christine Kim
Project Coordinator
Fundraising Academy

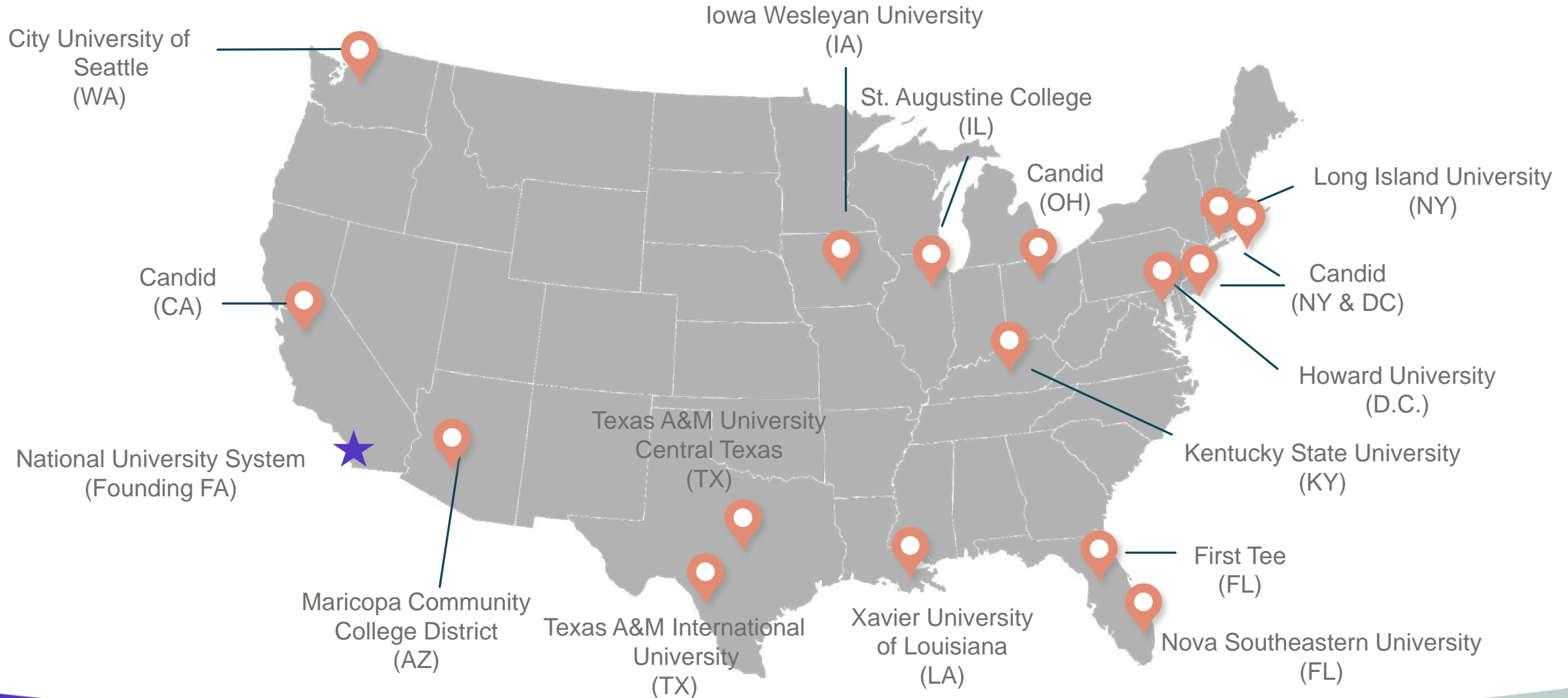


FUNDRAISE

YOU'VE GOT A CAUSE.
LEARN HOW TO FUND IT.



Our Affiliate Partners



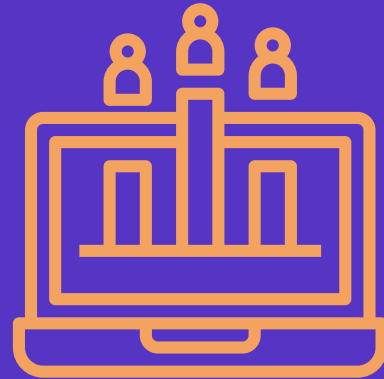


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POLL: Tell us about yourself!



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

Lessons Learned



- 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



LESSON #1

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



Connections during COVID

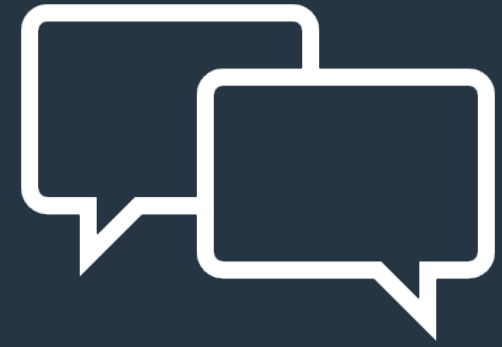


- No opportunity for **spontaneous interactions**
- Can't take **communications for granted**
- Plan for **work conversations, brainstorming, breaks**
- **Online networking** opportunities

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**





COMMUNITY SHARE

Share your stories and questions!



Lesson 1: Connections and Partnerships



LESSON #2

Maintain donor contact
no matter what!

Donor contact

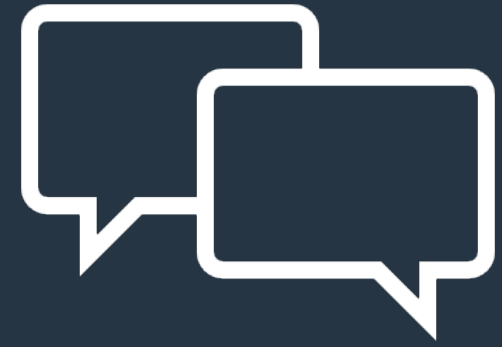
- **Relate personally**, with empathy & transparency
- Use **phone or talk in-person online**.
- **Person to person** conversations = **47% increased giving**
- Meet donors **where they are** - easy software and/or phone
- Invite the **family**
- How **can you help?**



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

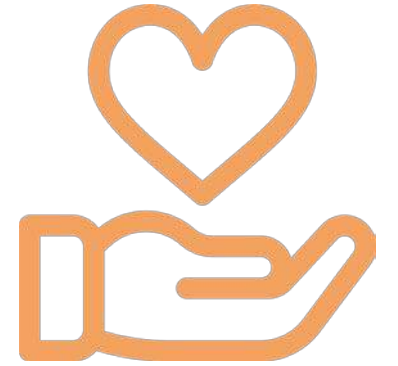


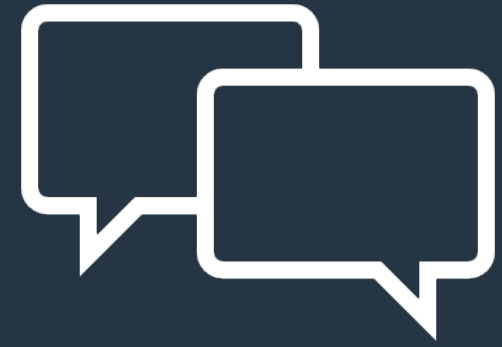
LESSON #3

**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!



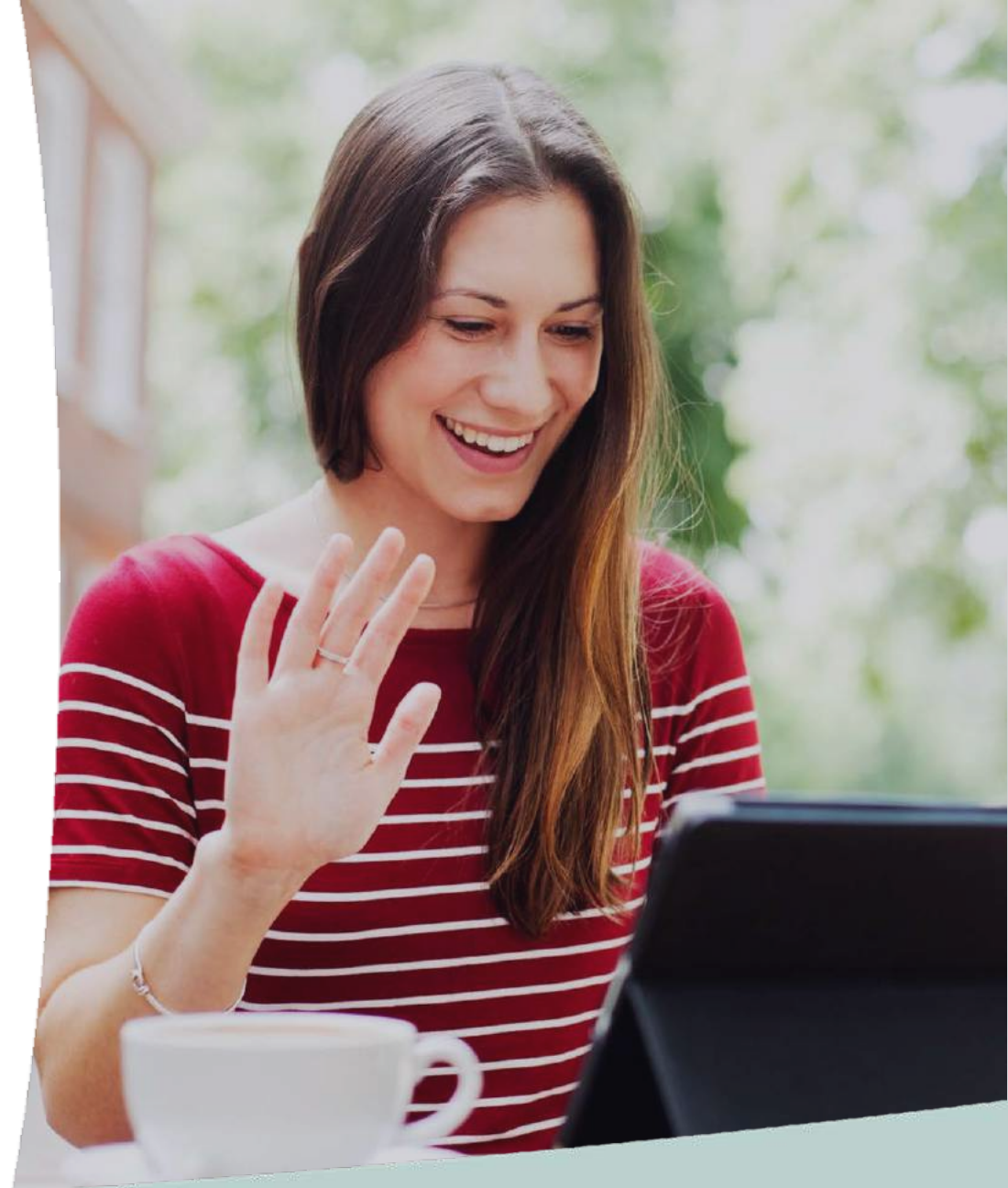
Lesson 3: Case Support



LESSON #4

**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



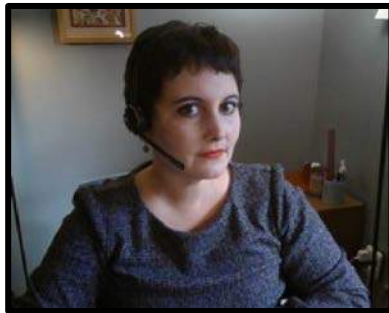
Smiling, engaged, looking at donor



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**

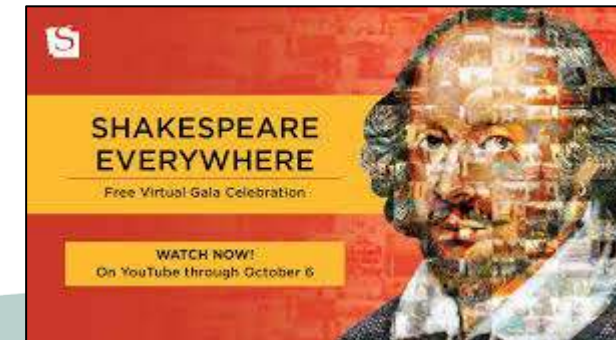
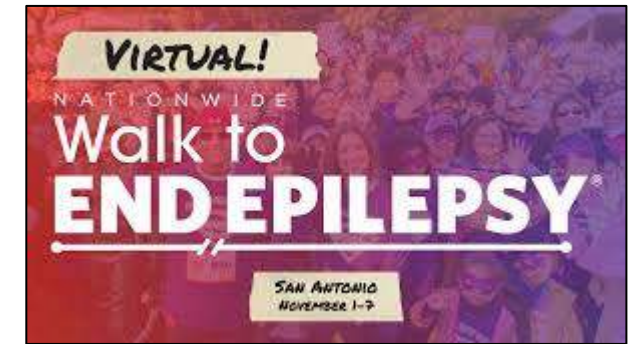
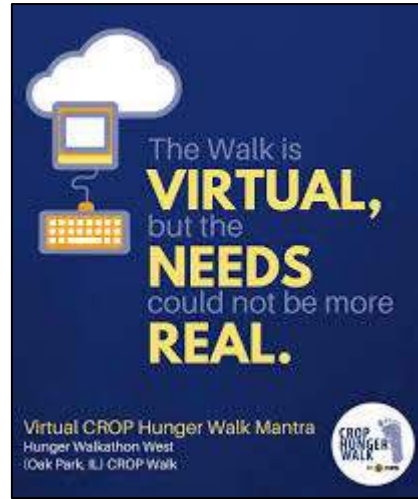


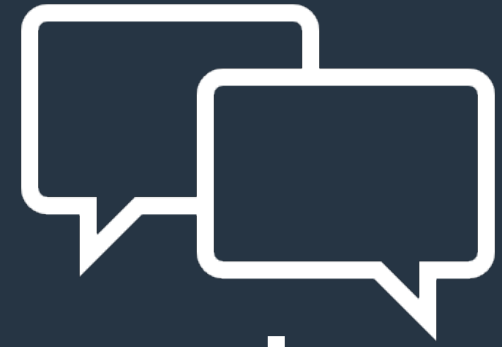
Virtual Events: Give them what they want

- 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





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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!



LESSON #5

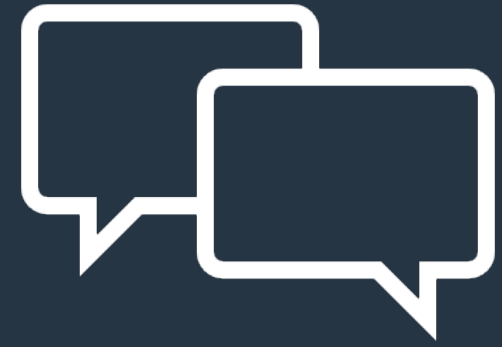
Get educated on *planned giving*



Planned giving is having a moment

- COVID-19 prompts donors to **contemplate legacies**
- Number of **wills created & updated soars**
- 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

REGISTER TODAY

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:



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THANK YOU

TAKE YOUR CAUSE AND
CREATE IMPACT.

**fundraising
academy**
CAUSE SELLING EDUCATION

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

Professional Networking Resources:	Technical: Software/Planning
San Diego Planned Giving Partnership: sdpgp.org	PG Calc: pgcalc.com – Also a great resource for webinars & Marketing
AFP San Diego Chapter: community.afpnet.org/afpcasandiegochapter/home	Crescendo: crescendointeractive.com – Also a great resource for webinars and marketing
North County Philanthropy Council: ncphilanthropy.org	National Association of Charitable Gift Planners: charitablegiftplanners.org – CGP Link Online Community, National Conference on Planned Giving and many other resources
The Hive: leichtag.org/the-hive	Miscellaneous:
Marketing Resources:	IRS.gov
Stelter: stelter.com	American Council on Gift Annuities: acga-web.org
PlannedGiving.com	Legacy.com – for obituaries/ decedents
Pentera -- Pentera.com	Planned Giving Design Center: pgdc.com