

ENGAGEMENT FUNDRAISING IN THE COVID-19 ERA



market  smart

EMPATHY

Where are you on the spectrum?



Survival mode



Thrive mode



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Survival mode



Thrive mode

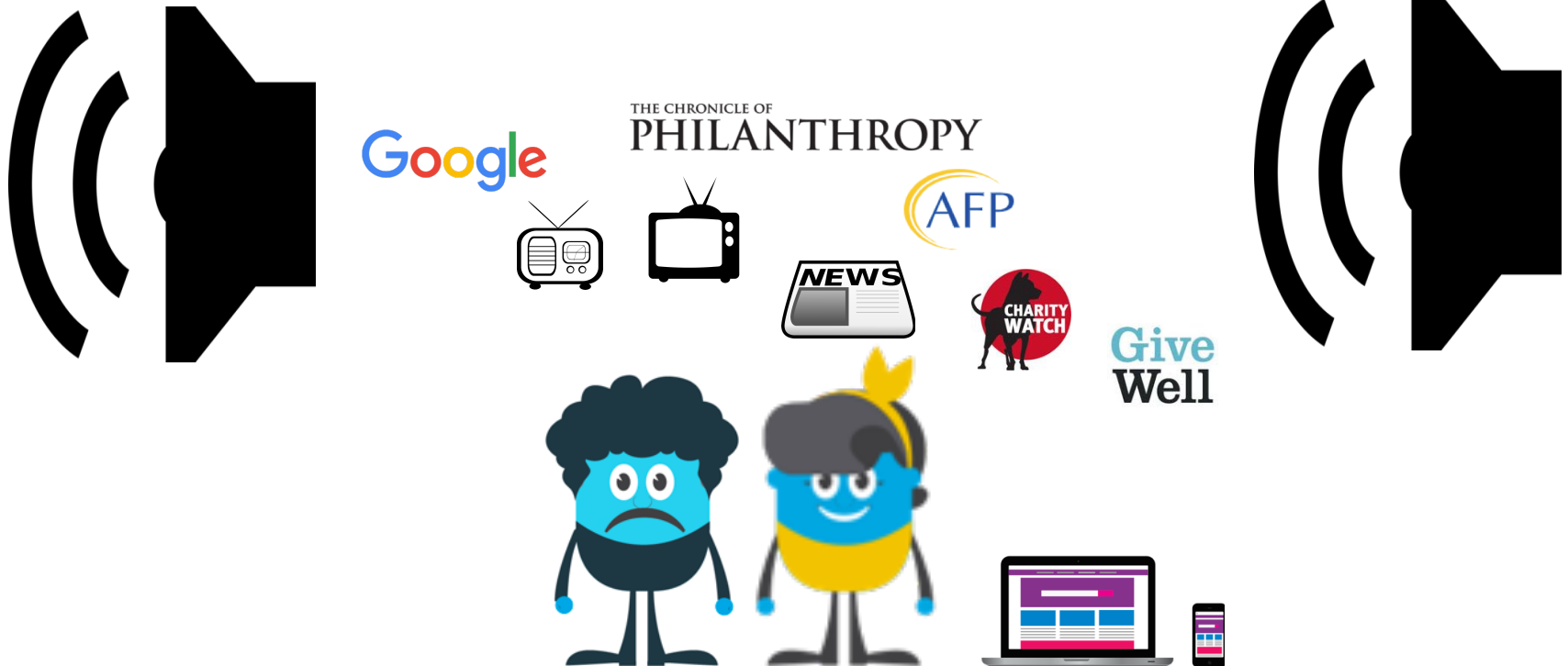


POLL

Where is your organization?

INUNDATION

Advice, counsel and recommendations

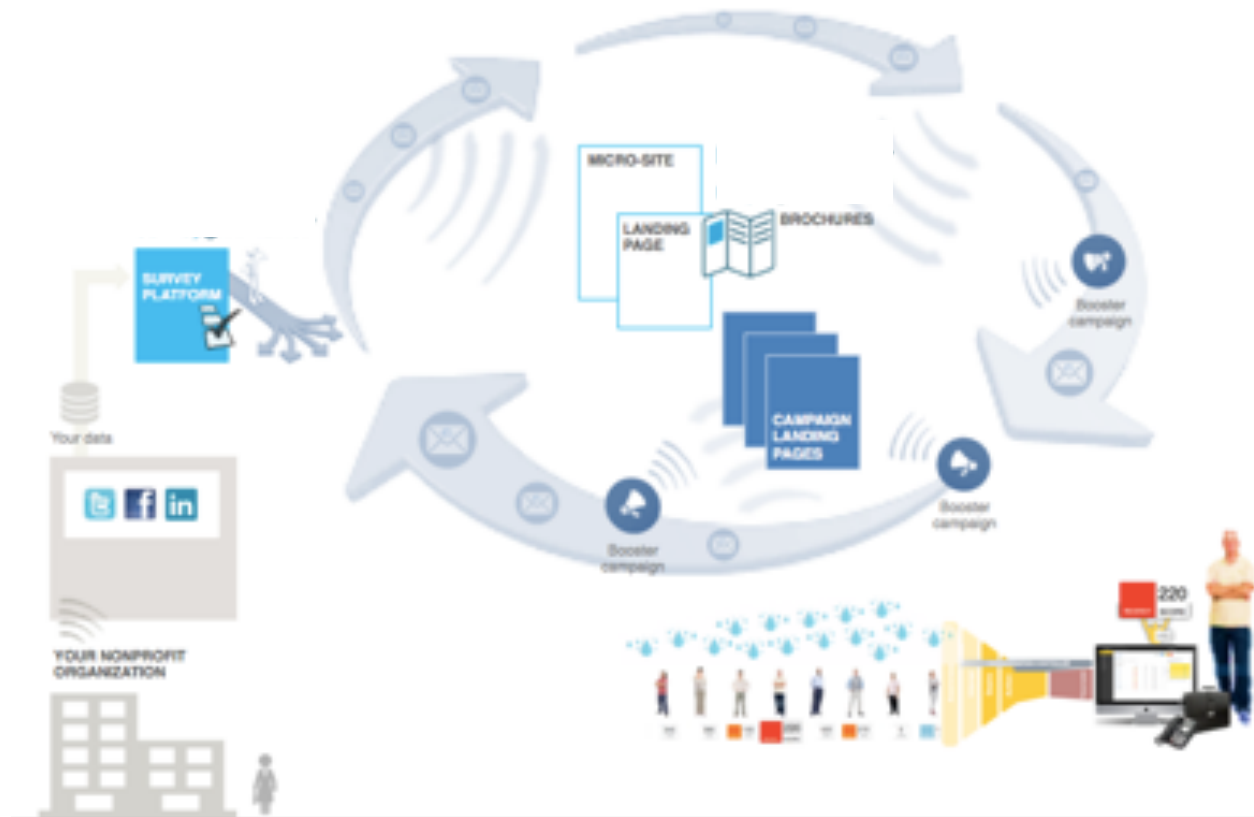


NO SILVER BULLET

You decide **what's right for your organization.**



NO SILVER BULLET



NO SILVER BULLET

Automated cultivation emails

PAUSED



NO SILVER BULLET

Automated cultivation emails

PAUSED

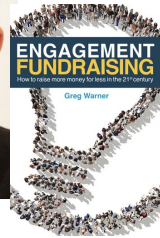
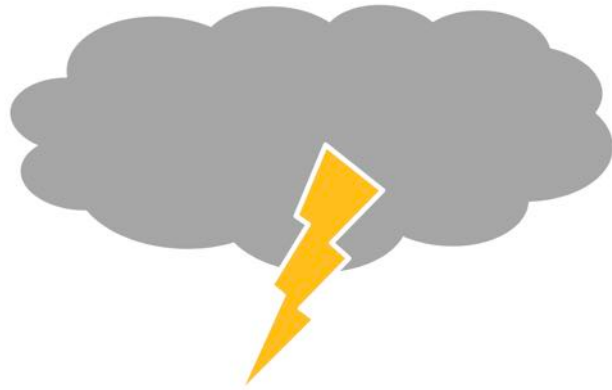


POLL

When should we restart them?

OUR RECOMMENDATIONS FOR YOU

FUNDRAISING CLIMATE CHANGE



Greg Warner
CEO & Founder

market  smart

FUNDRAISING CLIMATE CHANGE

10 COMMANDMENTS OF ENGAGEMENT FUNDRAISING



THOU SHALL RECOGNIZE THAT YOU HAVE SERIOUS COMPETITION

Your organization is **competing with over 1 million other nonprofits** (in addition to all the other financial demands they face) for "share of wallet." Be open, honest and transparent.

THOU SHALL REALIZE THAT MOST OF THE EASY MONEY AND BIG DOLLARS COME FROM MAJOR GIFTS AND BEQUESTS

80% of charitable donations come from individuals. 8% from bequests at an average of \$57,000 and 72% from living individuals.

THOU SHALL AIM TO FIND NEW MAJOR AND MID-LEVEL DONORS FIRST

Acquiring new, low-level donors is expensive yet they are much less loyal than major donors and usually have less money to invest in your mission.

THOU SHALL INVEST HEAVILY IN CUSTOMER SERVICE AND DONOR RETENTION

Supporters deserve genuine, heartfelt thank you notes, easy access to donation receipts for tax purposes and outstanding overall access to representatives of your organization who can answer questions and provide value. It's much **easier to keep a donor than to find a new one.**

THOU SHALL UNDERSTAND THAT DONORS WANT TO FIND MEANING IN THEIR LIVES

They want to be the hero in their own life story. They want to find a way to live on in the minds of others. They want to further define themselves by associating with your mission. They want opportunities to honor people who made a difference in their lives. **Give them the "warm glow"** they desire.

THOU SHALL SURVEY YOUR SUPPORTERS FREQUENTLY

For-profit businesses survey their customers religiously. Your supporters want to have **two-way conversations** with you. They deserve to be heard.

THOU SHALL SHOW 'EM THAT YOU KNOW 'EM

Unless they gave anonymously, you owe it to them to **recognize who they are and why they gave.** Show 'em that you are listening and that you care about each of them as much as they care about your mission.

THOU SHALL MONITOR DONOR BEHAVIORS ONLINE IN ORDER TO DETERMINE WHICH MESSAGES TO SEND & WHEN

Amazon.com monitors each customer's behaviors to provide highly relevant shopping experiences and convenience. Your supporters deserve the same **outstanding attention to their needs.**

THOU SHALL TRACK AND SCORE SUPPORTER ENGAGEMENTS ONLINE

Tracking and scoring donor engagements helps you determine where each supporter resides in the gift consideration continuum so you can deliver the right messages at the right time and **ask for the gift when the time is right.**

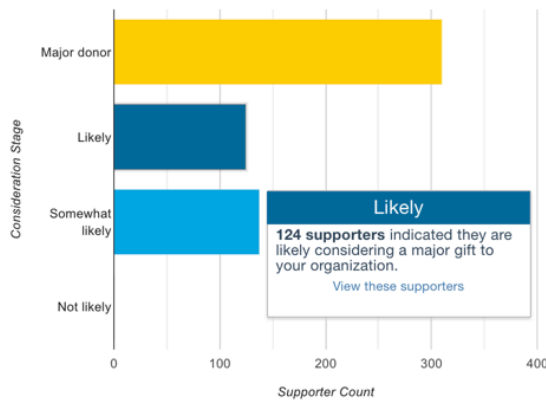
THOU SHALL OFFER VALUABLE ENGAGEMENT OPPORTUNITIES FOR HI-VALUE DONORS, PROSPECTS AND MID-LEVEL SUPPORTERS

Supporters want to be more than financiers. They want to be involved. They want **meaningful experiences.** Let them have them.

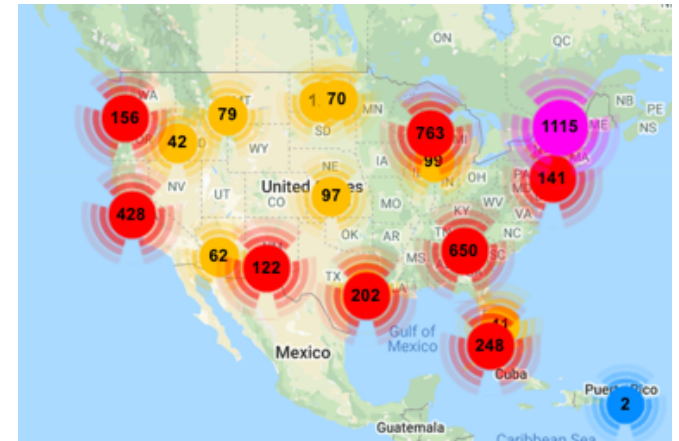
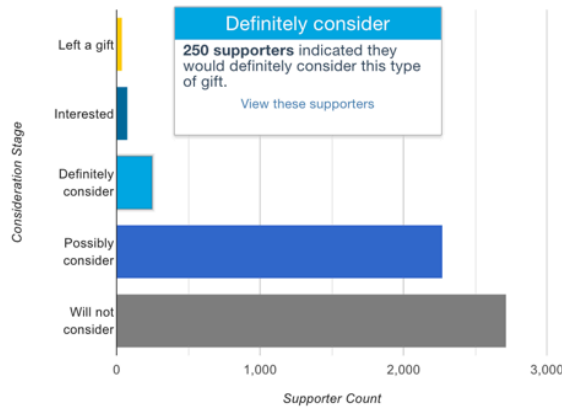
MarketSmart's Engagement Fundraising System

OUR SYSTEM WAS BUILT FOR THIS; NOW IS THE TIME

Major Gift Pipeline



Legacy Gift Pipeline



‘READINESS’ IS KEY



Supporters

This search contains 3,467 supporters

Page: 1 / 116 >

Recency Key: ● ● ● ● ●

Recency ▾	Lead Score ▾	Name ▾	Legacy Gift ▾	Major Gift ▾	Action
● 3/13/20	2460	Elizabeth	Definitely consider	Likely	
● 2/19/20	2150	 Ronald	Left a gift	Major donor	
● 3/13/20	2060	 Gary	Left a gift	Major donor	
● 12/18/18	1535	Jeff	Interested	Major donor	
● 3/13/20	1435	Tisha	Possibly consider	Likely	
● 2/20/20	1415	 Larry	Left a gift	Major donor	
● 3/13/20	1375	 Michael	Left a gift	Major donor	
● 10/22/18	1330	James	Interested	Major donor	
● 9/3/19	1285	Robert	Interested	Major donor	
● 3/13/20	1280	Jim	Interested	Likely	
● 8/24/16	1270	Amanda	Possibly consider	Likely	
● 3/13/20	1260	 James	Left a gift	Major donor	
● 3/13/20	1235	Kim	Possibly consider	Major donor	
● 1/3/20	1205	Lee	Possibly consider	Likely	
● 3/2/20	1185	Brandon	Possibly consider	Major donor	
● 7/26/19	1185	Man Ching	Interested	Major donor	
● 1/2/19	1175	Ronald	Possibly consider	Somewhat likely	
● 6/5/19	1165	 Kathleen	Left a gift	Major donor	
● 3/13/20	1160	 Fred	Left a gift	Major donor	

2150

◀ Previous

Next ▶

Ronald Legacy Gift: Left a gift Qualification: Pending review 

Close

Contact ▶

Demographics ▼

Age: 60-69

No children

Highest education: Bachelor's degree

Supporter CRM Data ▼

total lifetime giving

\$312,020.00

lifetime giving amount

\$12,120.00

largest gift amount

\$300,000.00

clientid

26360

lifetime # of gifts

57

Save

Zillow ▶

Verbatims

Digital Body Language

Score Impact

Donor Journey

2019 Prospects Survey

Response from May 21, 2019 ▼

Question

Answer

1) Why is Benedictine College important to you?
Please select all that apply.

I attended Benedictine.; Other; I care about the mission of Benedictine.; I am or have been faculty or staff at Benedictine.; I have a family member or friend who is attending or has attended Benedictine.

1a) Please specify - if selected "other"

Life long power of community is omnipresent through one's entire life.

2) There are many ways to engage with Benedictine College. Have you engaged with the College in any of the following ways? Please select all that apply:

Commencement; Regional Christmas Parties; Donations to Benedictine; Athletics; Plays, concerts or cultural events; Alumni Events; Campus clubs or organizations; Homecoming Weekend; Scholarship Ball; Reunion Weekend; Memorare Army

2b) How often do you engage with Benedictine College - if selected "other"

Monthly

3) Which aspect of Benedictine's mission is most important to you? Please select one:

I know that Benedictine provides a world-class faculty to educate men and women within a community of faith and scholarship.

4) When thinking about future generations, how important is it to you that Benedictine College is able to provide a quality liberal arts education and enrich the lives of its students?

Of utmost importance

Donating online with a credit card

I already have

Mailing a check

I already have

Making a recurring contribution

I already have

Talking with a gift officer face-to-face or on the phone about making a substantial investment

I already have





Email engagement

Subject line: A heart-warming story

- Jan 10 at 7:33 PM: Email Opened
- Jan 10 at 7:33 PM: Email Link Clicked
- Jan 10 at 1:01 PM: Email Delivered

[View Full Report](#)



Visited pages for a total of a few seconds

Jan 10 at 7:33 PM

- mybenedictinegiving.org/supporters-like-you/supporter-stories

December 2019



Email engagement

Subject line: A quick update for you about what's happening on campus

- Dec 16 at 7:18 PM: Email Opened
- Dec 6 at 9:18 AM: Email Opened
- Dec 6 at 9:14 AM: Email Opened
- Dec 5 at 4:47 PM: Email Opened
- Dec 5 at 4:22 PM: Email Opened
- Dec 5 at 4:21 PM: Email Opened
- Dec 5 at 3:48 PM: Email Opened
- Dec 5 at 3:39 PM: Email Opened
- Dec 5 at 3:38 PM: Email Opened
- Dec 5 at 1:39 PM: Email Opened
- Dec 5 at 12:50 PM: Email Opened
- Dec 5 at 11:41 AM: Email Opened
- Dec 5 at 11:28 AM: Email Opened
- Dec 5 at 10:08 AM: Email Opened



OUR RECOMMENDATIONS FOR YOU

Make changes with a scalpel, not a sledgehammer.



OUR RECOMMENDATIONS FOR YOU

Make changes with a scalpel, not a sledgehammer.

- Temporary situation
– we always recover
from Black Swan
events

OUR RECOMMENDATIONS FOR YOU

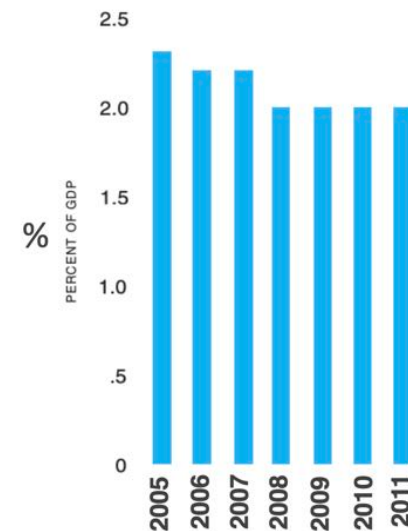
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- Temporary situation – we always recover from Black Swan events

The Great Recession of 2008

Giving declined only slightly (-7.0% in 2008 and by another -6.2% in 2009)

As a percentage of GDP, giving fell minimally, dropping from 2.1% in 2008 to 2.0% in 2009, 2010, and 2011



Source: Giving Institute Foundation

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Make changes with a scalpel, not a sledgehammer.

- Eventually, supporters will be sick of hearing about COVID-19

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Make changes with a scalpel, not a sledgehammer.

- Donors don't want to think about death, so don't make them!

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 **Gregory Warner**
We help fundraisers qualify, cultivate & prioritize major donors & legacy s...
1d • 🌐

Folks, asking people to include your organization or institution in their estate plan during this crisis is not cool. Ask for advice, GIVE to them, or keep quiet! Good grief!!
https://lnkd.in/eKPT2_k

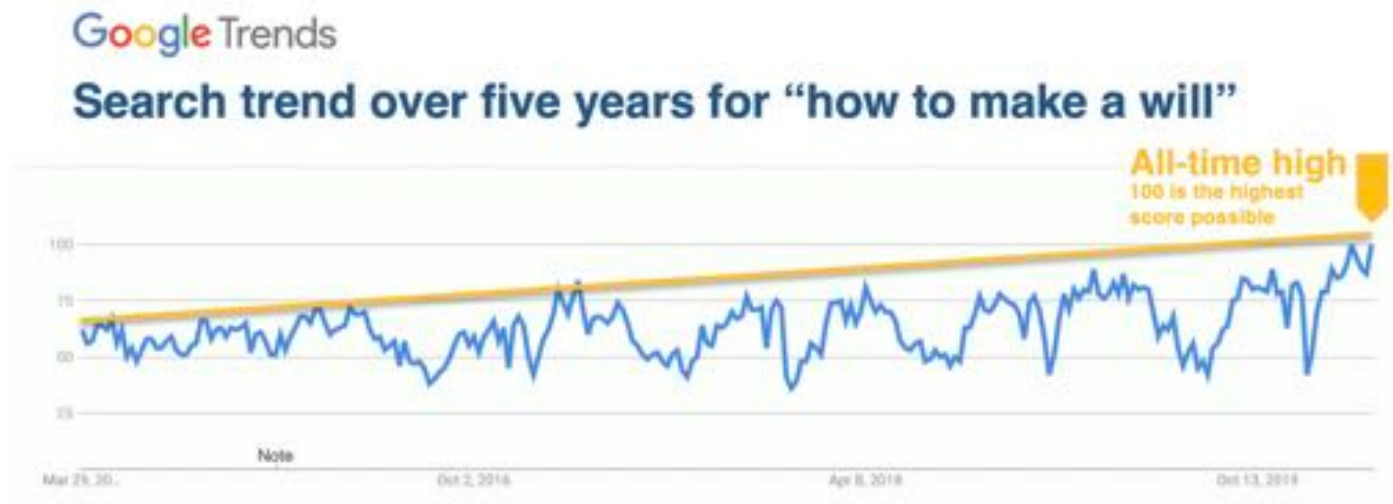


Ole Miss Basically Asked People to Put Them in Their Will in Case They Die From COVID-19
distractify.com

🌐 🌐 🌐 16 · 10 Comments

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Tips for engaging your donors:

1. Show empathy for your donors and provide value.

- How are you doing? Are you safe?
- How about your grandchildren?
- I'm here to be your conduit.

2. Let them talk and you listen.

- Ask questions
- Respond to some of their questions with questions.
- Learn about their needs.
- Offer them something of value
(i.e. a menu of ways they can help)

Questions?

We want to hear from you.

What are you doing to connect with donors?

Questions & comments?