

HONORING YOUR DONORS DURING COVID-19



MAP

MISSION ADVANCEMENT



Objectives for Today

- *Focus on best practices and adapt stewardship plans for this exceptional time.*
- *No matter your COVID-19 situation, share tangible, specific strategies to engage with your donors in a meaningful way.*



PART I: LET'S TALK STEWARDSHIP



HONORING YOUR DONORS DURING COVID-19

No matter your COVID-19 situation, this is the prime time to steward your donors.

Whatever you do, do not go silent!

You must continue to share the importance of your mission, how this time has affected your organization, and the impact of your work in the community thanks to the support of your core donors.



LET'S TALK STEWARDSHIP

stew·ard·ship

/ˈst(y)ooərd,SHip

noun

the job of supervising or taking care of something, such as an organization or property.

The most important thing to remember when it comes to stewardship:

We do not own our organization's donated funds. We are the stewards of those funds, and it is our responsibility as fundraisers to ensure gifts are properly implemented as the donor requests and then to report the results of those activities with the donor.



Stewardship does not refer to the activities that follow after a gift – stewardship is constant.

Never assume what your donors want – ask them!



WHY IS STEWARDSHIP SO OFTEN PUSHED ASIDE?

We often are so focused on our revenue goals and metrics that we push aside stewardship elements.

We forget that it is easier to retain a donor than it is to bring in a new donor.

Our performance might be measured by revenue only and not other metrics like retention and gift growth.

The urge to get on the hamster wheel of busy work takes over and we put our stewardship plans aside for “next week.”

Some may ask, “Isn’t a meaningful thank you enough?”



Now, more than ever, your personal relationships are key to your organization's survival – and you might even find the opportunity for those relationships to blossom more so than in the past.

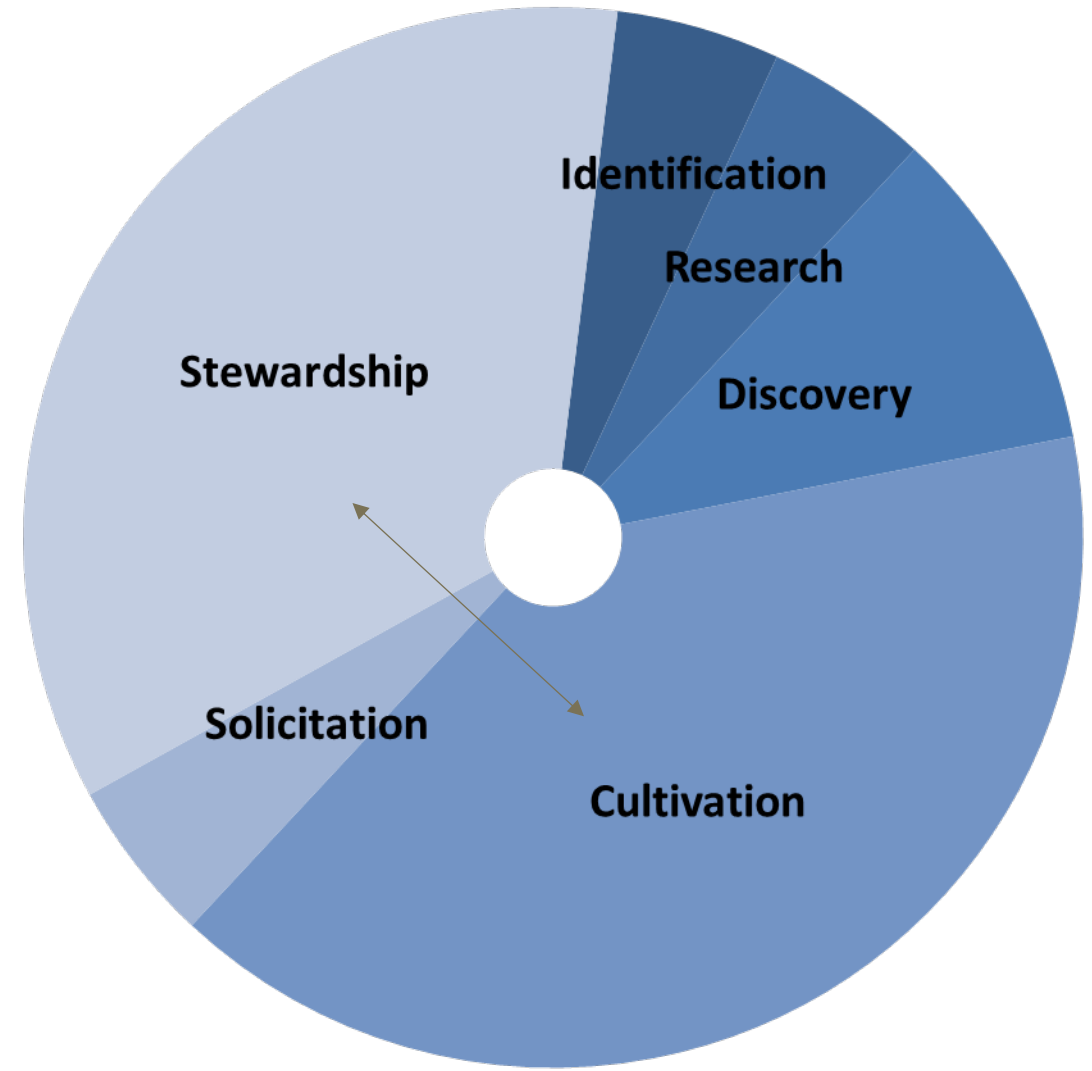
No one has a crystal ball for these times, so we just need to do the next best thing each and every day.

That is the essence of donor relations/stewardship.

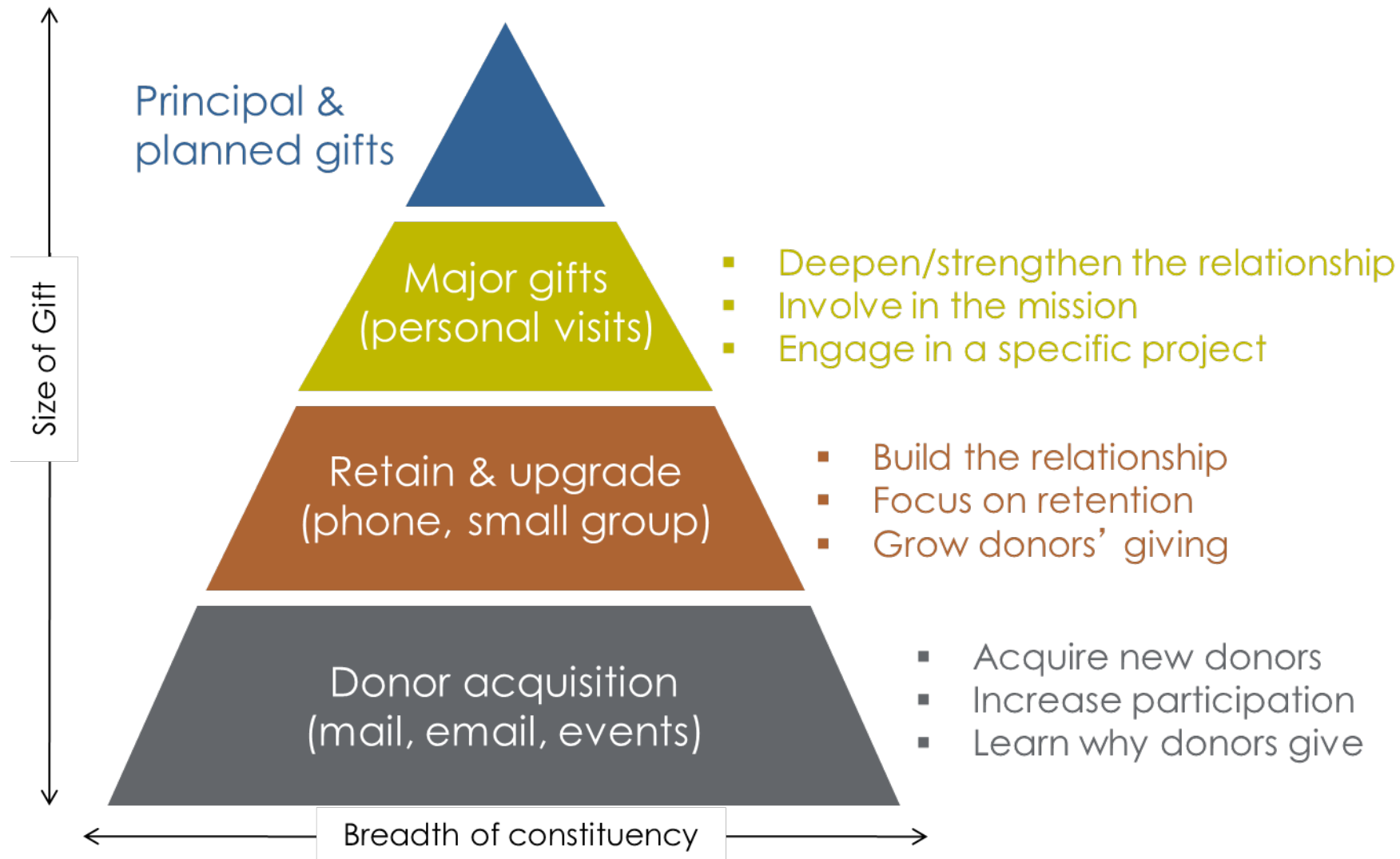


RETHINKING THE DONOR CYCLE

- Stewardship is often cyclical with cultivation – think of the two as interconnected.
- Cultivation and solicitation are where we should spend most of our time!
- These activities are the most enjoyable to do – get out of your office and deepen relationships.
- The joy of surprising and delighting your donors never gets dull!



THE DONOR PYRAMID & STEWARDSHIP



WHAT IS PROPER STEWARDSHIP?

- Planned and meaningful contact with donors
 - A plan is critical.
 - All types of communication – yes, we still use the phone – especially now during COVID-19 when donors are more often at home!
- Donors want to understand the direct impact their gift makes
 - Impact stories, program evaluations, accurate reporting, client letters of gratitude
- Value-based giving and long-term relationship building
 - Meaningful relationships build donors for life – we help donors achieve their philanthropic vision
- Priority should be thanking, engaging, and recognizing donors continuously
 - Implement specific stewardship plans (a receipt is not a plan)



BEST PRACTICE FUNDAMENTAL: THE STEWARDSHIP PLAN/MATRIX

- A comprehensive plan for how your organization responds to all levels of giving is essential for consistency and effective basic stewardship.
- Someone in development must own this process and ensure it is executed and recorded in your database.

Gift Level	Volunteer Note	Staff Call	Staff Visit	CEO Letter	Monthly Newsletter	Token Gift	Donor Reception	Honor Roll
\$0-999	x				x			x
\$1,000 – 2,499	x	x			x	x		x
\$2,500 - \$9,999		x	x		x	x	x	x
\$10,000+			x	x	x	x	x	x



BEST PRACTICE FUNDAMENTAL: CUSTOM STEWARDSHIP PLANS

- Focus this process on high-affinity/high-capacity donors
- Ensures regular interaction to increase donor connection to organization and specific impact of gift
- Intentional communication and activity
- Reflects donor's preferences for engagement
- Reflects donor's needs for information and access
- Collaboration among all who interact with donor
- Must be a unique, long-term plan, not a cookie-cutter recipe!



CONSIDERATIONS FOR CUSTOM STEWARDSHIP PLANS

The key is to create specific, personal touches that speak directly to the donor's interests, motivations, and connection!

Stewardship Activity/ Action	Notes (who, what, when, where, why)
Personal acknowledgment	Who should contact the donor personally? Board, CEO, volunteer, staff member? Multiple people? How? When?
Written acknowledgment	Personal notes, Acknowledgment with special messages
Appreciation gift	What is something special the donor would enjoy and find meaningful? Personalize to organization and mission
Public acknowledgment	If appropriate, share good news via social media, email, or PR release
Events	Offer VIP invitations and seating at annual events? Recognize at a special small reception event?
Personal involvement	What would the donor like to see or experience to enhance relationship with organization? Who should be involved?
Gift follow up	How has the gift been used? Share impact and make it as personal as possible.
Long-term follow up	Add actions for long-term stewardship activities and personal touches and communications



HOW HAS STEWARDSHIP EVOLVED?

Years Past

- Reactive response to receipt of a donor's gift
- Focus on donor only after receiving a gift
- More grounded in “good manners” and recognition

Pre-COVID-19

- Donor-centered and customized
- Transparency grounded in ethics, responsibility to show judicious use of resources
- Meaningful and informative
- Ongoing with multiple touches to satisfy outcome-savvy donors – impact!



HOW HAS STEWARDSHIP EVOLVED?

During COVID-19

Even more donor centered and customized than ever before!

- Meaningful communication – 1:1 preferably
- Share needs and impact with sensitivity
- Communicate organization's status and progress frequently
- Involved other staff in sharing stories
- Keep your donors close!



WHATEVER YOU DO...

Don't Go Silent!

Your mission is just
as critical now as it
ever has been!



Before we get into specific strategies, let's talk about the culture of philanthropy in your organization & why it matters critically to stewardship!



WHO “OWNS” STEWARDSHIP IN YOUR ORGANIZATION?

- Development Team
 - Donor Relations Staff
 - Gift Officers
 - Special Events Staff
 - Communications Staff
 - Development Operations Staff
- Program Staff (Mission Front Liners)
- Volunteers
- Beneficiaries/Clients/Students
- Organizational Leadership, including CEO and Board



WHAT IS A CULTURE OF PHILANTHROPY & WHAT DOES IT HAVE TO DO WITH STEWARDSHIP?

Role of philanthropy celebrated in messaging

- Share far and wide: Internal and external outlets

Board, staff, and volunteers are advocates in the community

- Everyone must be on the same page regarding organizational priorities

Board and staff are updated on significant donations and philanthropic partners

- Ensure success stories are shared and celebrated broadly

Recognize everyone's role in philanthropic success

- It takes a village: promote everyone's value in the results



HOW DO YOU CREATE A CULTURE OF PHILANTHROPY DURING A PANDEMIC?

- Changing culture takes time – but start with small, simple steps
- Break down silos – get to know everyone
 - *Encourage cross-departmental meetings and communications – even if they are virtual*
- Steward your own colleagues throughout the organization
 - *Schedule calls, virtual coffees – your object should simply be to get to know them and their role better*
- Celebrate successes beyond the development office
 - *Tell staff how they helped make a donation or connection happen*

*This is the perfect time to steward your colleagues as well as your donors.
As your organization becomes more involved in development,
they will naturally help with the critical work of stewardship.*



A young couple is smiling and holding white coffee cups at a cafe. The woman is wearing a red jacket and a patterned scarf, and the man is wearing a dark quilted jacket. They are both looking at each other and laughing. In the background, other people are blurred, and the scene is brightly lit.

PART II: SPECIFIC STEWARDSHIP STRATEGIES

HONORING YOUR DONORS DURING COVID-19



Let's Talk Specific Stewardship Strategies for COVID-19 Times



THE ESSENCE OF STEWARDSHIP IN THIS TIME

- It's the same as before COVID-19 – but even more critical!
- Do not wait for a new gift to begin stewarding – it should be a constant cycle.
- Get creative!
- Make it your goal to surprise and delight your donors – make it a meaningful experience.
- Involve your entire staff and board in this process – this is something everyone can do now.



RECOGNIZING THE CURRENT ENVIRONMENT – NOT EVERYONE IS IN THE SAME BOAT!

- Every state and urban area is experiencing varying degrees of lockdown currently.
- Of course, we must adapt our strategies and communications to be sensitive to our donors and adhere to local guidelines.
- Recognizing that we are all in different situations currently, we will share ideas that can be carried out virtually with no direct contact, and some that you can execute in a more open environment.
- No matter your situation, ask your donors what their comfort level is for contact.



Virtual Stewardship Ideas



VIRTUAL STEWARDSHIP

- Consider Zoom/video meetings/happy hours/coffees (depending on organization culture)
 - Yes, some donors may be tired of video calls, but do not assume!
 - Ask your donor if they want to have coffee over a video chat to catch up – make it clear it is not an ask.
 - Do not defer meetings “until you can do them in person” – you are missing critical time!
- Consider a Surprise FaceTime or Zoom Call – just to say hello
 - This will work best with close donors/board members who you know well already.
 - Ensure you are calling donors who know how to answer these types of calls.
- Pick up the phone for a good, old-fashioned call – to say hello, touch base, and/or ask advice
 - Donors love to give advice and it brings them closer to the organization.



VIRTUAL STEWARDSHIP, CONTINUED

Record a short video on your phone and send via text or email to your donor

- Share your personal thanks to them for their support or an important update
- Ensure it is simple and casual – be yourself
- Keep it short (30-45 seconds)
- Consider some online programs like ThankView, which allows you to create customized, personal videos to donors – might suit your technology needs better but loses a bit of the personal touch in that it feels less “homemade.”

Text or email photos to your donor that are personal and meaningful to them

- Share a photo of your mission in action if they cannot see it themselves
- Tell them a meaningful client story that is fresh and relevant
- If you are part of a school or organization to which donors have sentimental attachment, send them a photo of a beloved school building or area
- Consider a simple hello/thank you message – short and simple



VIRTUAL STEWARDSHIP, CONTINUED

- Connect donors to program staff/teachers/professors as desired and appropriate
 - As development staff, we are the matchmakers in our organization. Donors want to talk to the front-line mission folks.
 - Connect donors to the staff who manage the programs or areas about which they care the most.
 - They can video chat, email, or talk on the phone – do not wait until in-person meetings are possible since we do not know when that will happen. This is the ideal time to create these connections.

- Consider surprise deliveries of small, meaningful gifts
 - Customize the gift to the donor's interests and connection to the organization
 - Keep it small but meaningful – low cost (donors do not want you to “waste” funds)
 - Examples: a book that came up in discussion, a framed photo of a special site on your campus, a box of their favorite cookies, a framed quote, etc.



VIRTUAL STEWARDSHIP, CONTINUED

› Send handwritten notes or reports

- Mail is still a great way for donors to notice your appreciation – very few people send letters these days.
- Send a meaningful thank you or have a mission recipient send one about their story and how the organization and the donor's support have meant so much to them.
- If in a school environment, consider asking a student to write their parent or grandparent a letter about their school experience and how much their support has meant to them – may be hard to keep a secret, but it might work for high school students or seniors who have more independent access to email and their phones.
- Another school idea – send a copy of a nostalgic yearbook photo to an alumnus/a donor.
- Send more personal reports of the donor's gift impact – formal reports are less likely to be read than a handwritten note or personal letter.
- If you are a faith-based organization, consider creating a prayer team and prayer cards and mail to your donors (example message: we prayed for you today, etc.)



VIRTUAL STEWARDSHIP, CONTINUED

› Virtual tours/experiences

- These can take place in a variety of formats depending on your institution and situation.
- If you are in a capital campaign and in the construction phase – consider virtual hard hat tours. They can be carried off with great impact!
- If you are a school, consider virtual tours for prospective students, but also for current families to show how you are getting ready for the school year, how much the students are missed, etc. Get creative!
- If you are a faith-based organization, hold virtual prayer meetings, church services, or more personal 1:1 prayer calls.
- If you have adjusted your programs and facilities to adapt to these times, create a virtual video of behind-the-scenes operations.
- For special donors, conduct a live FaceTime walk-through of your offices and have staff say hello – if privacy issues allow.



Beyond Virtual Stewardship Ideas

*Tactics for Stewarding When You
Have the Ability to Leave Home*



BEYOND VIRTUAL STEWARDSHIP

› Consider “Ring and Runs”

- This strategy will work best with donors with whom you have a closer connection.
- Go to their home, ring the doorbell, and then back up to the curb and have a social distancing chat if they answer.
- Consider leaving a note if they do not answer.
- This can work with deliveries of treats or small gifts as well.
- Simple gestures like this can delight especially those who are stuck at home, senior donors, etc.

› Schedule a Driveway Chat

- This can work with donors you know as well as with those you may be getting to know.
- Ask if you can bring a couple chairs and have a driveway visit with social distancing.
- Provides opportunity to casually chat, get to know them better, and share updates about your organization.



BEYOND VIRTUAL STEWARDSHIP

- Suggest a meeting on a walk, at a park, or on a restaurant patio
 - Many people seem to be more comfortable being with others outdoors.
 - Ask their preference – a lot of donors might like a reason to get out responsibly.

- Recent Case Study
 - A client is in a campaign in solicitation mode and adapting to these unusual times.
 - The campaign chair discovered a campaign donor prospect also had a dog, so she casually suggested getting together to throw a ball with the dogs and have coffee.
 - The first meeting went well and turned into two more meetings with the dogs.
 - During their conversation in second meeting, the campaign naturally came up, and at the latest meeting she asked if she could send a proposal to the donor regarding a gift to the campaign.
 - The donor said yes, and she recently delivered the proposal – and the donor is considering the gift now.
 - This example shows that major gift cultivation/stewardship is possible even now.



ANOTHER LONG-TERM CASE STUDY

(THIS CAN BE ADAPTED FOR THE COVID-19 TIME!)

- A couple donated significantly to a university to honor their departed son. Stewardship included:
 - The university named a previously unnamed residence hall for the young man.
 - A dedication ceremony was held to commemorate the naming, with speeches by the president, a professor, two students who knew the young man, and the donor, along with a song from a musical the young man enjoyed sung by a student choir. A reception followed.
 - The school presented to the parents a scrapbook with pictures, notes, and remembrances of their departed classmate.
 - A photo portrait of the son was enlarged, framed, and hung in the interior of the building, with a plaque of an inspirational quote from the young man.
 - The university gave public recognition of the student at what would have been his graduation; parents received a diploma on his behalf.
 - The school sent periodic handwritten notes and emails, digital photos, or articles of meaning to the parents, as well as a small gift on the first anniversary of the son's death.



ANOTHER LONG-TERM CASE STUDY, CONTINUED

(THIS CAN BE ADAPTED FOR THE COVID-19 TIME!)

Continued attentive stewardship helped to facilitate the couple's decision to make a second very significant gift to the university to honor their son in another building at a second campus. Stewardship included:

- Dedication of a church service on campus in memory of the young man on his birthday and the day of his passing. The parents are invited to attend as well as other friends of the student and the family.
- The parents initiated a presentation each fall for all the sophomore residents to honor their son, which includes gift cards to Starbucks and iHop (their son's favorite places). The couple pays for these gift cards. The Development office prints the cards for the gift cards.
- The Development office also distributes blank cards for the students to write thank you notes; these handwritten notes are then mailed to the parents.
- The father was invited to serve on the board of trustees.

Lesson Learned: High-level stewardship takes time, but that time is exactly where we should be focused to create donors for life.



Embrace this time as a
reset for your team.

**Focus your energy on the
activities that truly build
transformational relationships.**



KEY POINTS TO REMEMBER

- Make a plan – do not just carry out stewardship haphazardly!
- Track your actions in your database.
- Involve other staff in your organization.
- Get creative!



STEWARDSHIP IS CONSTANT!

Our development terminology sometimes gets in the way of our understanding of how we should work with donors.

Cultivation and stewardship are nearly the same – especially when you are working with current donors or lapsed donors.

Do not wait for a gift to steward – show the donor your value as an organization and how they can be a special part of your mission!

Continuous, creative touches are critical – an acknowledgment letter is not a stewardship plan.



Remember, there is no such thing as real *donor fatigue*!

Donor Fatigue = Underwhelmed and/or underappreciated donors



GREAT STEWARDSHIP ELIMINATES ANY CHANCE OF TIRED DONORS

- Spend less time worrying about numbers and more time wondering how you can make your donors' experiences meaningful.
- “*No Money = No Mission*” is still true, but the way to get there is through stewardship.
- Do not spend this COVID-19 time paralyzed; use this time to creatively steward your donors to closer connections.



In Summary



THE SECRET TO SUCCESS

- Listen.
- Then listen some more.
- Keep listening!
- We listen to learn about our donors, and we listen to love our donors.
- If donors feel that we really care, that we hear them and respond to them, extend their connections with our nonprofit organization, and grant them a sense of belonging within our mission, they will give and give again.



WHY IS THIS SO IMPORTANT?

AS DEVELOPMENT PROFESSIONALS, WE ARE
THE STEWARDS, NOT THE STARS, OF OUR
MISSION.

WE ARE IN THE BUSINESS OF CREATING
TRANSFORMATIONAL CONNECTIONS AND
RELATIONSHIPS TO HELP MAKE POSITIVE
CHANGE IN THE WORLD.





YOUR QUESTIONS



Special thanks to my fellow
MAP Client Service Team for
their wonderful contributions
to this content!





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Go to our website: MissionAdvancement.com

Development Strategies During COVID-19 Crisis

Mission Advancement is offering you and your organization a free 30-minute consultation with one of our development professionals – no strings attached.