



# 7-STEP PATH FOR MEANINGFUL DONOR CONVERSATIONS IN THE COVID-19 ERA

# THE CRITICAL CONTEXT



The donor who has contributed to you prior to this crisis already believes in your organization and feels that the mission is important to them. You don't have to convince them of the value of what you do. They trust you to use their money effectively. You should assume that they will continue to invest. The donor to whom you may have spoken during the early months of COVID, may now need to be thanked for a gift or cultivated on the path toward a gift request.

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## STEP 1

### PREPARING FOR THE CALLS

#### **Prioritize your contacts**

Review your donor contacts since March and re-segment your Major Donor contact list for the 4th Quarter of 2020. Prioritize using the following sample donor segments:

- Donors that you spoke to and now require a second (or 3rd) contact.
- Major donors who you were unable to reach over the past six months.
- Individuals who gave at the Major Donor level over the past six months.
- Members of your Legacy Society (if you have one).
- And...time permitting: Those who give regularly, regardless of gift size

#### **Match each donor with the right caller**

You, a fellow staff member, a Board member or a trusted volunteer.

#### **Prepare your talking points**

Your talking points should include 3 – 5 key points that you want to include in the conversation. These will vary and be customized to each individual. Draw from their donor file—their favorite programs, type of gift or time of year they prefer to donate, any history of tribute or memorial gifts, intel from past conversations.

## STEP 2

### DESCRIBE HOW YOUR ORGANIZATION HAS ADAPTED TO SERVING MORE CLIENTS OR DIFFERENT NEEDS

This is your chance to spotlight your creativity and innovation, while reinforcing your core mission. How did you pivot to a remote (and, possibly decreased) workforce? Are you also serving clients through a virtual connection? How did that transition work and what have you learned? What challenges are you facing? Update if this is a repeat conversation.

## STEP 3

### THANK THEM FOR THEIR LAST GIFT AND THEIR HISTORY OF SUPPORT

If this is a first conversation or if they just donated, tell them how you spent that gift and, most importantly, how your clients benefited. Cite real examples.

## STEP 4

### DESCRIBE HOW YOUR CLIENTS/PARTICIPANTS HAVE BEEN AFFECTED BY THIS CRISIS

Share a personal story of one or more of them. Be prepared to discuss trends in client needs and what you're projecting. How has your client population changed during the pandemic? What new needs or issues are emerging? Update if this is a repeat conversation.

## STEP 5

### ASK HOW THEY ARE DOING

Engage in active listening with your donor. It's important to understand how the pandemic is affecting your donor, not only sheltering in place but the impact on their job, their business and their family. If this is a repeat conversation, be sure to ask what has happened since you last spoke. Listen for cues to health issues or financial problems.

## STEP 6

### TELL A STORY ABOUT A STAFF OR VOLUNTEER HERO

Understanding the toll that the crisis has taken on your paid and volunteer workforce is important to donors. Tell them about an all-star; someone who has risen to the challenge of these times, perhaps someone overcoming personal obstacles while finding new and creative ways to help your clients through these times. If this is a repeat conversation, use a different story.

## STEP 7

### EXPLAIN YOUR MAJOR CHALLENGES

For example: managing a remote workforce AND on-site workers, transitioning your fundraising Gala to a virtual platform, coping with the loss of income from government contracts, replacing your depleted volunteer force--you'll have your list. This is your chance to share what's keeping you up at night and to highlight what you need—not an ask but an inventory of your top priorities.

# SOME FINAL TIPS...



## **Remember, this is not a solicitation**

This conversation is not transactional. It is an important stewardship and cultivation opportunity. But be prepared to respond to cues like “How can we help?” or “Where do you need a gift the most?” with a gift proposal appropriate to the donor’s history. This means be ready with an ask amount even if that wasn’t the purpose of the call!



## **Do not be surprised to discover legacy gift commitments**

Several colleagues who have had these conversations report donors informing them that “By the way, you’re in my will” or “We’ve been meaning to discuss how we might include you in our estate plan.” Be prepared with a response. If you don’t have a Planned Giving program, PRG can provide you with basic materials and talking points to respond quickly and appropriately to ensure that you capture this exciting gift commitment.



## **Ask for their advice**

With what your donor knows about your agency and what you’ve told them, ask what they would suggest regarding some of your major challenges and dilemmas. Draw on their experience. Bring them into your confidence. You’re not obliged to enact their suggestions but make them a thought partner. This is a mark of respect and trust.



## **Be ready to suggest sustaining gifts**

A donor may say “I wish I could give more but I’m just not in a position right now to do so.” The answer might be to suggest a sustaining gift—a pledge over multiple years payable at XX\$ per year. Many sustaining donors will actually increase their annual payments as their finances improve and your stewardship strengthens their relationship.



## **Log the conversation**

The details of this donor conversation will be important later. Jot them down right after you conclude the call and make sure your notes are entered into their file or record. The timing and level of an ask will be guided by this invaluable discovery.

# REACH OUT TO US!

Partnership Resources Group is listening to our clients and the many organizations who are adapting and responding to our ever-changing environment. To support your efforts to stay with the changes, PRG is here to help you create practical fundraising Action Plans.



## **ABOUT PRG**

We work across the mission spectrum, helping organizations increase community impact through effective fundraising campaigns. We partner with organizations across sectors to create successful fundraising campaigns. With your mission and impact at the center of our work, we perform market analysis, develop sound strategies and effective messaging, and inspire strong leadership.

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