



STEWARDING MAJOR DONORS IN THIS GLOBAL CRISIS

In light of the current global crisis that we all face, we are witnessing unsettling times for human health and economic stability around the world. The question facing us today is:

How do we conduct business today when the landscape is fluid and uncertain for tomorrow?

Dunham+Company would like to provide you with a strategy that appropriately stewards mid and major donors on portfolio in the coming week(s).

This strategy takes into account:

- + The need to move away from the reliance on face-to-face meetings,
- + Embraces a ministerial need our donors potentially want from us, and
- + Is built in a scalable format that can be extended or reduced as needed.

As we reflect on the need to stabilize communications and funding, especially in the area of major gifts, we must also keep in the forefront of our minds the wellbeing of our donors.

Every major donor is facing difficult decisions around committing to funding opportunities. This is complicated further with the threat of COVID-19 (coronavirus) and health concerns, especially for those 65+ in age or with compromised immune systems.

In the realm of mid and major gift development, our world has been flipped upside down. Donors are not willing to meet face to face due to the warnings from the Centers for Disease Control (CDC), and even if they were willing to meet, due to the uncertainty of the economy, reports from the field indicate donors are in a "wait-and-see" mode of operation—in other words, they are not willing to commit to any substantial amount of funding at this time.

Facts

Here is a reflection of today, which is changing almost on an hourly basis:

- + Donors do not want to meet face to face and, in fact, are calling to cancel meetings in the coming days, which were previously set by the gift officer.
- + To ensure quarantine measures are taking place, life as we know it is disrupted through school closures, event cancellations, restaurant limitations, and travel restrictions.
- + Donors are asked by the government and the CDC to self-quarantine from possible coronavirus exposure, which in many cases is causing anxiety and fear to set in.
- + Due to global economic decline, substantial financial commitment by donors is being avoided and/or donors are reducing their list of organizations they are willing to fund to their "core" organizations (for the time being).

Conducting Business in March and April:

So, how are we to support our donors through these tough times? *We should set aside our needs and prioritize our donors above all else.*

March 23–27: Embrace Your Donor’s Emotional Needs

Send your portfolio of donors a personal and highly customized email from the gift officer offering words of encouragement, and highlighting the impact the organization is making in light of the global health crisis. If your organization embraces prayer or reflections of well-wishes, ask your donors to either join you in prayer for the country by outlining specific things to pray for, or ask for your donors to pause and reflect on how they can partner with you to continue making a positive influence in your community and throughout the nation.

- + Send a custom and highly personal email to every donor on portfolio.
- + Call every donor who is missing an email address on file and let them know: “The organization is going to be sending out special messages over the following weeks around these unique times and we do not want you to miss out, so please provide us with an email address.”

March 30–April 3: Custom Video from Officer

Develop a 45–90 second video that shares insights and encouragement from the officer to the donor. This is a time to empathize with and encourage the donor, as they are likely full of anxiety and/or frustration due to their current circumstances, and a word of encouragement through email could be just the thing that they need to get them through the day.

- + Send this to every donor on portfolio but make the email look like it is coming from the officer and not from a batch email delivery system.
- + Though the video can be captured on the phone, make sure the shot is from the chest up, the background is well framed, and the talent is dressed as if they were going to meet with the donor in person.

April 6–10: Custom Video from Executive

Develop another 45–90 second video, but from the face of the organization this time where this person shares some insights, words of encouragement, a quote from a famous person in history, or even Scripture. A word of encouragement through video will be a meaningful way to reach donors, sharing key insights around the current state of the country/world and reflections on how the organization is working in the midst of it all.

- + Send this to every donor on portfolio but make the email look like it is coming from the officer and not from a batch email delivery system.
- + The officer should send this as a “special message” from the face of your organization so that the donor feels honored to receive it personally and feels like an insider.

April 13–17: Handwritten Letter from Officer

The gift officer should handwrite a letter to every donor on portfolio, or at least each donor they have a personal relationship with, as well as each donor who responded to any email sent over the last three weeks.

- + This letter should reflect on the personal relationship established and should share how, together, they are making a difference around the country/world.

Our hope through these strategies is that, as a ministry, you build a unique bond with your donor by showing personal concern for them, engaging with donors who otherwise may not feel obligated to do so, gaining insights on donors if they share a prayer request, and updating contact information for donors on file.

In this with you,

Erik Rogers
Chief Strategist of Major Gift Services
Dunham+Company



Dunham+Company[®]
Cause+Effect

dunhamandcompany.com