Engaging and Retaining Donors
Keep Supporters Involved During COVID-19
Impact of COVID-19 So Far

Progress Made But Challenges Loom

**Fundraising**
89% facing some financial challenges, 77% facing major challenges or threats to stability

**In-Person**
65% have had to cancel fundraising events

**Programming**
96% face challenges but 88% still made virtual shift

**Decisions**
57% delayed a purchase or decision; 8% layoff or furlough for staff

*Survey respondents from nonprofit partner survey*
Fundraising Overview

Stay Engaged and Relational

**Relationships**
- Need to stay engaged with donors even if not asking
- Send at least monthly updates
- Offer glimpse into what work looks like now
- Ask how they are

**Make an Ask**
- Most nonprofits are financially struggling, and many donors may be as well (or at least uncertain)
- Organizations can (and many should) be fundraising right now
- Pitch pivot, current work, or future impact but urgent need
- Frame within COVID-19 lens
- Beginning to consider recovery

**Engage Funders**
- Talk now with foundation or other institutional funders
- Share with them your program and communication plan, as well as impact on operations
- Share challenges or needs due to COVID
- Get sense of decisions or shifts about next funding round
Tip #1: Keep Communicating

**Make a Plan**
- 96% have shifted communications (66% formal plan)
- Need plan through July for team to use
- Should include who is doing what, short-term goals, and any messaging details

**Stay Relevant**
- Need to have content to post through COVID-19 lens
- Can still engage and people are looking for positive content
- Right answer isn’t silence either
- Stay present on your main channels

**Explain Pivot**
- Explain pivot if you have done or are doing so
- Don’t oversell, but focus on creativity, work, and impact
- Show message of hope despite challenges
Communicate What is Urgent and Unique

Keep Donors Informed

Why?
Need to make case around need—either due to increased demand or due to future impact

What For?
Make it clear and specific about what you are doing or preparing for

Why Now?
Have to include urgency to drive action and engagement
Share Local

Focus on Smaller Networks

Publications
• We all know major regional publications, but content bar is high given everything
• People may also only be engaging with certain content in those publications
• Focus instead of community and neighborhood newsletters, magazines, etc.

Groups
• NextDoor, Facebook Groups—these are trusted and local social networks
• Find ways in to spread message
• Don’t lead with ask

Peer-to-Peer
• Think of “local influencers”
• Are there people who can act as ambassador?
• Who do people trust?
Tip #2: Go Virtual

Widespread Cancellations

Timing

• In-person fundraising events through summer should be postponed
• Ensure flexible contracts for events through fall
• Delay announcement of in-person events in the fall/winter until situation is more certain (July)

Virtual

• Many groups moving event online
• Options include livestream, recorded programming, or a straightforward fundraising campaign
• Think about what audience will want, what they’re missing, and how to meet need
• Need to be shorter than in-person and ask for some kind of engagement

Realistic

• Be realistic in what you can expect from audience
• Set realistic goals (fundraising will likely be lower)
• Involve staff and key stakeholders early
• Need two weeks of advertising minimum
• These shift when/if things re-open
Virtual Options

Three Ways to Go Online

Livestream
- **What is it?** Broadcasting someone performing or speaking live to the audience for majority of event
- **Benefits:** Most urgent, best option is really engaging content
- **Cons:** Can be costly, challenge to produce, loses appeal if not watched live

Recorded
- **What is it?** Sharing prompts or recorded videos with audience
- **Benefits:** Easy production, creative options, can closest replicate event experience
- **Cons:** Tech limitations of audience, must keep them engaged, hard to evaluate

Campaign
- **What is it?** Simply doing an online fundraising campaign at a specific time
- **Benefits:** Easiest for you and audience, expected course of action
- **Cons:** Could be transactional, lose engagement elements of event
Option #1: Livestream

Creating Urgency for Participation

**Content**
- People will tune in or not based on content
- Go for well-known speakers or engaging artistic performances

**Test**
- Very important we test this out multiple times and at least 1-2 weeks prior
- Check audio, visual, WiFi, and the platform

**Message**
- Focus pitch on joining us, night of live entertainment, be a part of something
- Want them to feel urgency

**Best For:**
Arts nonprofits or those with an engaging or well-known speaker

**Examples:**
- Broadcast several songs by your choir
- Broadcast speeches by founder, ED, and city councilmember
Option #2: Recorded

Build a Virtual Experience

Event Plan
Vital to have a well-thought plan accounting for delivery of information and timing

Engaging
This can be the most engaging option if it uses creativity and stays on brand

User Experience
Also important to think of audience life right now—are kids home? What do they want to do?

Best For:
Nonprofits with powerful in-person events trying to replicate impact

Examples:
- Share different staff and client testimonials
- Give audience challenges or tasks before asking for a donation
Option #3: Campaign

Simple and Straightforward Option

Don’t Reach
- We may not all have the content or time to do the other options
- Better to do straightforward campaign well than other things poorly

Focused
- All messaging can be focused on supporting the organization
- Clear case to support (help us make up for event)

Easy
- Simple for you to organize
- Also simple for audience to engage
- Can bring in good amount of funds, especially if major donors engaged early

Best For:
Nonprofits needing immediate support with traditional events

Examples:
- Campaign on the night of original event
- Giving day challenge with matching gifts
Tip #3: Let Others Support

Virtual Volunteer To-Do List

1. Identify
   Identify gaps from loss of regular volunteers or new needs

2. Prioritize
   Probably only have capacity to manage 1–3 types of service

3. Recruit
   Focus on immediate impact, community, and connection

4. Check In
   Will need to check in with volunteers more often as well as with clients

5. Thank
   Continue to thank and appreciate your volunteers even if they can’t make the pivot

6. Data
   Dive into volunteer engagement statistics
Individual Donors Need to Be Engaged

Relationships and Specificity

**Reach Out**
- Donors need to hear from you now
- Both whole list message and individual outreach
- Giving still seems to be robust, although grassroots donors at risk

**Be Specific**
- If making an ask, be very specific about what it is for or why
- Donors face an uncertain financial future with jobs and stocks
- Need to cut through doubt with specificity
- Avoid feeling transactional

**Make a Plan**
- 3 people with 2 calls per day could call top 96 donors by end of mid June
- Offer “exclusive briefings” to groups of 20 donors or less
- Ask for feedback or advice through a poll
Tip #4: Inform Often

Keep People Aware and Engaged

Share Now
- If you haven’t sent a message to all donors or volunteers yet, or haven’t for two weeks, send one
- Can keep it brief but you want supporters to remember your work and not have uncertainty around present

Short Term
- Keep this update focused on the near term—the next 2-8 weeks
- Forecast length is based on level of change and impact at organization
- Goal should be to let people know change is happening, but not feel overwhelming

Comprehensive
- Share update on organization, staff, and programming
- Paint a realistic picture but also avoid doom/gloom
- Keep updates brief—goal is just to make sure people feel informed
Engaging Major Donors

Maintaining Relationships with Largest Supporters

**Wellness Check**
First thing we want to do is check-in with them and ask how they are doing; life updates will help guide us in how to engage them.

**Ask Advice**
Ask them for ideas, contacts, or examples of what else they are seeing from other nonprofit organizations.

**Share Plans**
Help them to feel informed and aware of your work; try to share any major updates with them prior to widespread public announcements.
Grassroots Donors

Ensuring All Can Be Engaged

- **Regular**
  - Send email 1-2 times a month depending on engagement

- **Involve**
  - Give everyone something to do at home

- **Positive**
  - Overall tone should be positive and focused on change—when possible

- **Sugarcoat**
  - Be honest about challenges or issues during this time

- **Silence**
  - Don’t ignore your supporters or stop sending updates
Virtual Donor Meetings

Replicate Best Parts of In-Person

**Personal**
- Just like a coffee or lunch, we want to connect with them
- People give to people
- Ask how they are, family, work, etc.
- Share your own updates

**Productive**
- We want these meetings or calls though to still have a strong purpose
- Have 1-3 major updates/points you want to share
- Describe short-term action plan

**Brief**
- More so than in-person, we have limited time for engagement virtually
- Attention drops after 30 minutes and even more so beyond an hour
- Stick to main points for update portion
Tip #5: Be Relational and Specific

Keep Making Your Ask

Reach Out

• Donors need to hear from you now
• Both whole list message and individual outreach
• No sign yet of decreased giving but hard to measure
• Grassroots donors and independent contractors most at-risk right now

Be Specific

• If making an ask, be very specific about what it is for or why
• Donors face an uncertain financial future with jobs and stocks
• Need to cut through doubt with specificity

Not Transactional

• In general, even before COVID, we were hearing from donors to not be transactional
• More true now than ever before
• Consider what to give back (e.g., opportunity to give advice, kids activity book, sense of action)
Parts of Your Ask

Different But Familiar

**Mission**
- Main mission, pitch, reason to care is likely same as before COVID-19
- Focus on others pieces to give lasting mission context and clarity

**Context**
- Add urgency of situation to your pitch
- Could be expanded needs of clients, new needs of clients, or new challenges for organization

**Clarity**
- Explain the pivot you are making and plans moving forward
- Reduce uncertainty
- Give specifics and try to track stories/perspectives from staff and/or clients
Donor Engagement To-Do List

Things to Do Now

1. Prioritize
   Make a list of donors who typically give during this time

2. Dialogue
   Ask how they are and/or for advice

3. Plan
   Make a plan for virtual engagement through July

4. Monthly
   Send at least a monthly update to your whole list

5. Thanks
   Keep a strong message of gratitude for current or past support

6. Data
   Clean up donor data or do analysis you’ve been waiting to do