

 **OUR TAKE**
for philanthropy leaders

Engaging donors virtually as in-person options return

How to integrate virtual channels into your long-term strategy

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The pandemic froze all in-person donor engagement efforts, forcing a rapid shift for development teams to virtual engagement tactics. With a return to in-person options on the horizon, many development teams are wondering what role virtual engagement should play in their long-term strategy. No development team should pursue a virtual-only donor engagement strategy, but most teams have a significant opportunity to strengthen donor connections using virtual channels alongside in-person efforts. Learn three ways every development team should engage donors virtually, even when in-person galas are back.

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Virtual donor engagement amid Covid-19

Development teams responded with impressive speed and creativity when in-person donor engagement was not feasible during the pandemic. This shift was particularly remarkable given how heavily the industry has relied on in-person tactics historically. Many teams were not merely ramping up existing virtual engagement efforts but instead creating entirely new events and processes. These tactics were necessary when in-person interactions were not an option.



We thought we'd migrate to [these virtual tactics] in 10 years but did it in three months."

Foundation President

Development teams will need to adjust their donor engagement strategy as in-person interactions once again become viable. Many teams are eager to return exclusively to the proven in-person engagement methods they employed before the crisis. They have fair concerns about the long-term efficacy of virtual tactics that worked in the highly unusual conditions of the pandemic.

The future of virtual donor engagement

No development team aspires to a virtual-only engagement strategy like the one all were forced to use during the initial Covid-19 crisis. However, teams should incorporate a mix of virtual and in-person tactics in their long-term donor engagement strategy for three reasons.

First, virtual channels allow you to reach far more current and prospective donors than in-person options alone (even when you're able to hold events at maximum capacity). Second, virtual channels can be a lower cost way to educate donors and follow up with them to identify their interests. Third, virtual channels enable you to meet donor engagement preferences. There will always be donors who strongly prefer in-person interactions, but other donors will increasingly expect ways to engage virtually.

Development teams are at an inflection point where they have an opportunity to form a more comprehensive donor engagement strategy not tethered exclusively to in-person tactics. Teams that make use of virtual channels along with traditional in-person tactics will have the best chance of engaging a range of donors.

Three opportunities to integrate virtual channels into your engagement strategy

Through our conversations with dozens of development leaders across the last year, we've pinpointed three ways all development teams should use virtual channels long-term:

01

OPPORTUNITY

Designate exclusively virtual events

02

OPPORTUNITY

Maximize in-person interactions with preliminary virtual visits

03

OPPORTUNITY

Match donor preferences with virtual stewardship options

01 Designate exclusively virtual events

Development leaders planning to incorporate virtual events into their calendar have two options. One is to designate specific events to be delivered exclusively virtually. The second option is to create hybrid events with an in-person component and a simultaneous virtual component.

We strongly recommend development leaders pursue the first option. On the surface, hybrid events can seem like the best of both the in-person and virtual worlds. In reality, hybrid events typically require making trade-offs to prioritize the experience of one audience over another (in-person or virtual). Both experiences can quickly become mediocre due to the complexity and resources required to produce both simultaneously.

Instead, identify specific existing events that will work well as fully virtual experiences and those that should be fully in-person events. You can also consider adding entirely new events that would be compelling virtual experiences.

Our top recommendation for fully virtual events is informational sessions – short webinars on specific topics. You can efficiently educate many attendees without the capacity constraints you’d face with an in-person session. Current donors and community members alike can enjoy the convenience of joining a webinar on a topic of interest with minimal effort.

We have collected several examples of these types of sessions; three are outlined here.

1. DESIGNATE EXCLUSIVELY VIRTUAL EVENTS (CONT.)

Informational sessions fit for virtual platforms

Geisinger Health Foundation



- One-hour virtual stewardship series
- Started with two webinars about Covid-19, transitioned to food insecurity and a range of other topics
- Presented by clinical providers and leadership

~ 100 attendees at each webinar

73% of new donors made a gift after attending

Inova Health Foundation



- Monthly to quarterly virtual education sessions
- Donors segmented by interest and giving level, topics ranged from Covid-19 to heart care
- Presented by leadership, physician leaders, and clinical experts

97 participants donated out of 176 attendees

\$1,962,108 total donations from 8 webinars

UCLA Health Sciences



- Nine-part virtual speaker series
- Each session focused on a distinct topic, from Covid-19 testing to integrative medicine
- Presented by panel of 3-5 faculty members/providers each session

4,259 constituents registered for at least one session

1,386 constituents were new to UCLA/UCLA Health

We recommend offering a series of informational sessions on different topics and then using the registration data to help you understand the interests of both individual attendees and your community as a whole. You have far less to lose by organizing a 30-minute webinar on a niche service than by hosting a large in-person gala, so these informational sessions can be an efficient way to test donor interest in specific topics. Furthermore, virtual sessions can be more convenient not only for donors but also for presenters. It is a substantially smaller request to ask a presenter to join a webinar from their office for 30 minutes than to travel to an in-person event. The option to present virtually may enable a highly in-demand clinician or executive to join an event they otherwise would not have.

Finally, informational sessions can also be a particularly effective way to educate (and learn more about) first-time donors who gave in response to Covid-19. Informational sessions can help these donors understand which institutional priorities interest them and they may want to support.

02 Maximize in-person interactions with preliminary virtual visits

Many development leaders strongly feel that in-person interaction should and will remain the best way to pursue major gifts. We do not disagree. However, major gift officers can and should use virtual channels to build and strengthen relationships with potential major donors. In fact, many development managers told us that their gift officers' skills have shown to be very transferable to a virtual setting.



Can you imagine Zooming a donor and asking them for \$20 million?

Senior Development Executive

For instance, major gift officers can use a virtual introductory meeting to discover the prospective donor's interests and associated institutional priorities.

Leveraging this information, the gift officer can then plan the subsequent in-person meeting with the prospect's interests in mind and assemble relevant internal stakeholders such as physicians, executives, or department heads for the prospect's visit. This process saves travel time and maximizes the in-person interaction when it occurs.

This element of saving time was not lost on Virginia Mason Foundation. They began tracking the average time it took for a gift officer to complete a virtual visit compared to an in-person visit. They established that virtual visits took half the time, so they subsequently increased portfolio sizes for their gift officers to account for this efficiency.

03 Match donor preferences with virtual stewardship options

There are many benefits to using virtual channels to engage donors as part of your stewardship playbook. Virtual channels can help you meet the growing preference among donors for easy and convenient outlets to give and communicate. Virtual options can also help you quickly connect with prospective donors. Our [grateful patient research](#) has shown the “window of generosity”, or the time that patients are most likely to give, is within 30 days of their discharge from treatment. Virtual tools can allow near-instant communication with donors, especially when compared to more traditional methods such as snail-mailed letters.

We’ve organized several virtual stewardship tactics below based on our assessment of how prevalent they are in the market. These are not intended to fully replace in-person stewardship tactics but offer additional ways to engage with donors based on their preferences.



3. MATCH DONOR PREFERENCES WITH VIRTUAL STEWARDSHIP OPTIONS (CONT.)

Virtual stewardship tactics

<p>Market prevalence</p>	<p>Competitive</p> <ul style="list-style-type: none"> ▪ Personal video thank you from an executive or physician ▪ Personalized donor webpages 	<ul style="list-style-type: none"> ▪ Virtual platforms for donations ▪ Text giving
	<ul style="list-style-type: none"> ▪ Digital gratitude platforms (ex. Thank View) 	<ul style="list-style-type: none"> ▪ Peer to peer fundraising
	<p>Baseline</p> <ul style="list-style-type: none"> ▪ MGO email touchpoints 	<ul style="list-style-type: none"> ▪ eNewsletters and impact reports
	One-on-one engagement	Mass engagement

We recommend all development teams offer the options listed toward the bottom of the chart as a baseline for your virtual stewardship strategy. Moving up the chart will keep your approach competitive with others in the industry and potentially aligned with donor preferences but may also require investing in new technology capabilities.

Before investing in additional outreach technology, assess the expected return. Keep in mind that merely having the capability is not the same as donors enthusiastically adopting it. Plan to invest substantial time and energy in promoting adoption among donors if you decide to roll out a new option.

Parting thoughts

Your long-term donor engagement strategy should include more virtual components than it did before the pandemic. How much more will depend on what you learn across the next year.

Many organizations saw a solid return on investment in virtual efforts during the pandemic. We don't yet know how well this success will translate when virtual engagement is not the only option. The answer is not simply "as well as virtual tactics worked before the pandemic" for two reasons. First, few development teams had made meaningful investment in virtual channels. Second, donors had yet to live through a prolonged period of time when so many routine interactions would become virtual.


The only way to figure out the right proportion of virtual and in-person tactics for your donor engagement strategy is to rigorously track process and outcome metrics. For example, update your definition of meaningful engagements with donors to include virtual visits and track related metrics such as: the number of meaningful engagements conducted virtually, time spent per virtual visit, and dollars-raised-to-goal trends.

Be sure to analyze the host of data generated by virtual engagement to further understand what's attracting donors' attention. Look at metrics including the relative open rate on emails, click rate on specific links, registration for virtual events, and actual attendance at those sessions.








PARTING THOUGHTS (CONT.)

If you regularly survey your donor population, ensure you are using the opportunity to understand when they would prefer to engage virtually versus in-person. Do they still want a hard copy of your annual report? Which events would they like to attend in person?

Expect donor preferences to change and evolve across the next year as we all navigate a return to pre-pandemic norms. Build in regular time to revisit your strategy and adjust it based on your data analysis. 

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