

Social distancing favors the transparent, intentional gift officer

In light of recent events – spread of coronavirus, stock market drop, travel bans, etc., as a frontline fundraiser, you may be asking yourself this very important set of questions:

1. Who do I call first?
2. What do I say to prospects?
3. How do I raise money?
4. How do I work remotely? Will prospects and my colleagues hear my kids in the background on conference calls?

There have been times in our history when fundraisers successfully navigated similar events (9/11, Great Recession, organizational scandals) and, through it, built stronger relationships with their prospects and donors. First and foremost, they took the time to refocus and think about:

- Staying connected with the people who are important to their organizations – people may be seeking contact and connection with causes and organizations that matter to them during an otherwise isolating time
- Getting out of the way of their own assumptions (e.g., people don't want to give at this time because they are thinking about so many other things)
- Truly focusing on the organization's priorities

There's a lot that we can't control, but what, during this time, can we control?

1. Using the approach and language of a forthright diplomat by balancing being sensitive to the current situation and inviting prospects into a conversation
2. Fully prepping for meetings by focusing on where the prospect is in their decision-making process about a possible gift, and what questions we need to get answered to move forward
3. Showing good meeting management during remote meetings (Prelude, Wrap-up, etc.)
4. Building prospect readiness by discussing the impact of gifts to your institution--now as ever, or perhaps especially now, etc.

So, you may be wondering what to say to prospects. Here is a **suggested framework**:

1. Ask and hear how they are doing
2. Recognize the situation and share how the organization is responding
3. Seek permission to continue the conversation: *"We had been discussing how you were considering making an impact on a student's/patient's life by [insert priority]. Some of the donors I work with have chosen to continue to discuss their gifts while others have asked to delay the conversation a few weeks. I didn't want to assume if or how you might like to move forward, so might you share with me your thoughts on continuing that conversation?"*
4. Explore options together for moving forward

Make it a goal to reach out to all your top prospects as soon as possible. Be respectful and aware of the current, in-the-moment reality – stock market dips, latest statistics, etc. Prioritize whom you call based on where they are in the Donor Engagement Process. Start with those who are further along in the process and work your way back to Assessment/Qualification.

Now is not the time to avoid your prospects and donors. Now is the time to show them that you care and are interested in them. Yes, they may represent numbers on your metrics, but we are all humans dealing with some of the same emotional and rational roller coasters that each day brings. Be the trusted advisor and professional by intentionally and thoughtfully communicating with them. Now more than ever, we must be focused on them as people and connecting them to the causes and priorities that matter to them most.

And as for the home office background noise, in the spirit of radical honesty, proactively share what they might experience in the course of the call and ask if they, too, might have some “working from home” surprises in your time together.