

STELTER

Seek First to Understand

1

Navigating the Unknown

2

Need for Connection

3

Impact of Uncertainty on Trust

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Donor Mindset

Navigating the Unknown

Uncertainty of health, mental health, employment and the future

- Geographic progression of COVID-19 is resulting in a mixed range of anxiety given donor's specific physical location
 - 7 Stages of Grief
- Express Scripts Report - "America's State of Mind Report"
 - From February 16 to March 15, prescriptions filled per week for antidepressant, anti-anxiety, and anti-insomnia medications increased by 21%.

7 Stages of Grief
(Kubler-Ross, 1969)

Shock*	Initial paralytic fear following the bad news.
Denial	Trying to avoid the inevitable.
Anger	Emotional outpouring of bottled-up emotions.
Bargaining	Seeking to transfer a vice onto.
Depression	Realization of the inevitability.
Testing*	Seeking to make adjustments.
Acceptance	Finally finding the way forward.

Navigating the Unknown

Uncertainty of health, employment and future impact mental health

- **Impact on trust can influence decision making**
 - Excessively seeking reassurance from others
 - Micromanaging people
 - Procrastinating
- **Consistent recommendations**
 - Focus on things you can control
 - Take care of yourself
 - **Stay connected**





Need to be Connected

Prof. Jen Shang, Co-Director of the Institute for Sustainable Philanthropy and the world's ONLY philanthropic psychologist

Webinar: "How to Love Your Donors During COVID-19"

Scientific research project prior to and during COVID-19

- Studied over 4,000 adults in the US and other countries
- Measured about 30 feelings that people experienced on a daily basis



Need to be Connected

Lack of WELLBEING due to DECREASE in sense of connection

- The feeling of being connected is 1 of the 3 most fundamental needs we have as humans
- Expected people would feel less connected to the world, other people, their communities and family/friends. NOT less connected to animals...tells us broader decline in connectedness
- Not just a PHYSICAL need, but more so the need for SECURITY and COMFORT



Need to be Connected

Opportunity for Charities

1. Recognize helping people **FEEL** connected with others is very different from actually being connected - the FEELING, not the FORMALITY.
• NEW MARKETING KPI = HUMANITY?
2. To **GENUINELY** meet people's need to connect, we have to take steps to connect with them first (note: innovation occurs at a much faster pace during times of crisis than normal times).
3. Continue to create two-way conversations so that your donors can **FEEL** listened to, understood and cared for.

THE PLAN

Survey: Extending your donor discovery


SURVEY-RELATED EMAILS

+38%
IN SUBMISSIONS

Increased nonprofit survey click-to-open rates

There has never been a more important time to take the pulse of your donors. A survey does just that. A recent increase in click-to-open rates suggests that people have time or are more interested in providing feedback to their favorite organization.¹

1. "MailChimp: Engagement Time Report for 2016" (https://mailchimp.com/engagements/time-report/2016/). Copyright © 2016, MailChimp, Inc.



THE OPPORTUNITY

Now is the time!

We know exactly where our donors and prospects are: **AT HOME.**

We work from home.
We socialize from home.
We plan from home.
We consume content from home.

We must reset our marketing plans to fit a "stay home" frame of mind and deliver content that sparks a feeling of connection.

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Navigating Planned Giving Outreach

- 1 The Importance of Planned Giving During a Crisis
- 2 The Role of Marketing
- 3 Tips for Messaging Success

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First Things First....This is About People

- Be empathetic, understanding of donor mindset(s)
- Fear, unknown, fluidity of situation can be paralyzing
 - Don't let it! Be proactive. Show your human side!
- No "One-Size-Fits-All" for engaging donors right now
- Listen, listen, listen

Marketing

- Death Reminders Inundating Us.** Everywhere you turn the media is giving us death tolls, death projections, etc.
- Death Just Got Way More Offensive.** Typical reaction is avoidance (desire to suppress reminders of death).
- NOW is the time to be "top of mind".** Will-writing and updating at all-time highs!
- Ways to Engage.** Thank you's, check-in, collect & share stories, show the impact of legacy giving, survey and offer assistance



Don't Be Stuck on the Sidelines

- **Stelter PULSE Surveys** (March 31 and April 30)
 - Surveyed 292 and 345 nonprofits respectively nationwide
 - Nonprofits actively communicating to donors rose from **66% to 79%**
 - Focus on stewardship and personal touches
 - Budgets under scrutiny as those seeing decreases grew from **14% to 28%**

(However, 2% did see a budget increase of 50%)



What's Working?

1 PICK UP THE PHONE

Phone calls, by far, remained the most common way fundraisers report connecting with donors.

50% "Phone calls remain the best way for us to stay in touch and interested in talking. We used a lot of our capacity needed either to advise and call to have a 'light chat' Our entire fundraising team doubled their outreach from last year. Most donors are still connected. But especially so in timing and amount of gift."

-Higher Education nonprofit

2 BUILD RELATIONSHIPS FOR THEIR OWN SAKE

People are isolated and eager for meaningful conversations. Older audiences are particularly vulnerable right now and really perk up at the chance to talk, if for no other purpose than to receive and be heard and understood.

50% "Connectivity and team camaraderie, meeting in person with key members and prospects. There is a real sense in the air that this may be an opportunity as well."

-Arts and Culture nonprofit

3 COMBINE APPROACHES

Develop a mix of approaches, such as phone calls in concert with direct mail + phone call + email. While more time available to follow up, fundraisers are better able to concentrate their efforts around a targeted campaign.

50% "We have continued with our narrative, which dropped the beginning of April. Good timing. Then following up with phone calls from musicians. Staff are sending note cards at this point in time. Looking ahead at virtual meetings with PG prospects. Let us get in or maybe write with a musician."

-Arts and Culture nonprofit

The Importance of Planned Giving During a Crisis

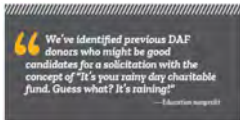
Planned Giving is Always About the "Long Play"

- Hard to think long term now given uncertainty of the next 24-hours
- Opportunity to train frontline fundraisers on planned giving

Opportunities

- NOT time for 'vehicle' asks (unless already in conversation with or prompted by donor/advisor)
- A deferred gift may provide an easier option to support your work
- Percentage designations are/will be more attractive than fixed dollar amount

What's Working?



"Had been planning a Stetler CGA mailing since January. It happened to drop on April 3. We used this as an opportunity to follow up with a phone call to ask if they received the brochure and if they would accept a personalized illustration. If we were not able to reach them by phone, we sent them an email containing an abbreviated CGA proposal for their review. So far we've sent out about 40 proposals and are in the process of completing one six-figure CGA as a result. We felt the mailing was providential as it gave our planned giving staff a focus during the crisis and a reason to reach out to our planned giving prospects."

-Higher Education nonprofit

The Role of Marketing

Context and Content Matter!

- Be mindful of the phases of communication your donors have seen from you in the last 2 months
- Understand planned giving marketing as 'Reactive' vs typical 'Reflective'
- Content is taking center stage
- What mediums make sense to use and how often?

Understand the “Phases” of Communication Your Donors Have Seen From You (and Others) the Past Couple Months

- **PHASE 1** – “Here’s what we’re doing to ensure the work we’re doing will continue, your donations are impacting the work you care about, etc.”
- **PHASE 2** – “We’re here for you, thinking about you, please let us know how we can help.”
- **PHASE 3** – NOW WHAT?

PHASE 1: Nonprofits reacted

How they did it:

- Assured donors of the nonprofit’s stability
- Described the organization’s response to the pandemic
- Sought support for immediate needs

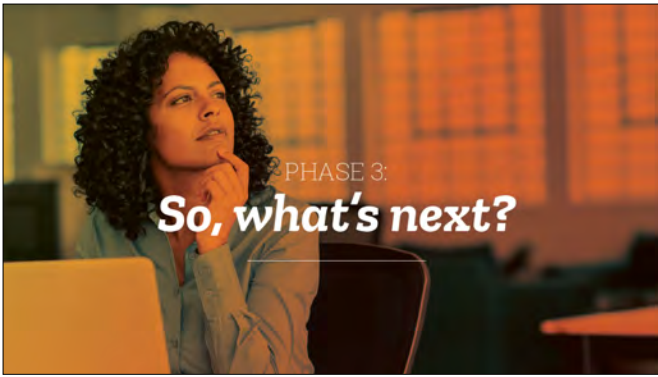
The image shows three vertical panels representing different communication types for Phase 1. The first panel, titled 'URGENT', features a red header and a photo of a person on a bicycle, with a prominent 'Call Now' button. The second panel, titled 'CRISIS RESPONSE', has a blue header and contains several paragraphs of text. The third panel, titled 'COVID-19 RESPONSE', has a white header with a red cross icon and a photo of people working outdoors.

PHASE 2: Nonprofits showed support

How they did it:

- Expressed empathy; offered encouragement
- Demonstrated hope and positivity
- Reinforced the connection: “We’re all in this together”


The image shows three vertical panels representing different communication types for Phase 2. The first panel, titled 'SUPPORT', has a white header and contains several paragraphs of text. The second panel, titled 'LIPPELL', has a blue header and features a photo of a person. The third panel, titled 'SUPPORT', has a white header with a red cross icon and contains several paragraphs of text.



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"Reflective" and "Reactive"

- **Unplanned Planned Giving** blog post (April 27, 2020)
 - Planned giving is typically reflective..Enter COVID-19
 - Make it easy to take action
 - Engage with allied professionals
 - Keep messaging simple
 - Engage donors to share stories
- **What's Trending: Content Takes the Spotlight** LinkedIn article (May 18, 2020)
 - The crisis has made content more valuable
 - Relevance is key





Five decades later, we are coming together in different ways. The COVID-19 global pandemic has brought into sharp focus how deeply we depend on one another to act for a greater common good. As we each do our part to take care of our beloved communities and ourselves, we create powerful collective momentum to continue fighting for the places and people we care about most deeply.

Thank you for being part of that fight. With roots dating back more than 125 years, the **Shirley Day** amplifies the power of nearly four million members and supporters to defend everyone's right to a healthy world. We are in this together, now more than ever.

Marketing

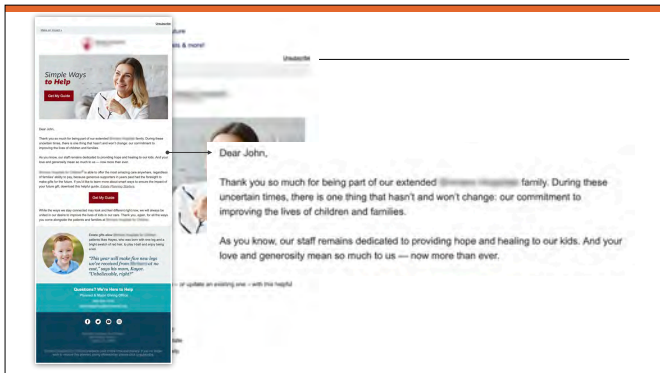
Tips for Messaging Success

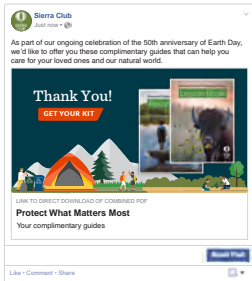
Critical that "Framing" of Messages is appropriate

- Messages just sent in Q1 may appear tone deaf today
 - i.e. "Plan for the Future", "Importance of an Updated Will", etc.
- Acknowledge, show empathy...but DON'T DWELL!
- Context varies by industry/vertical – Independent School vs National NPO vs University, etc...

Best Practices Around Content

- Simplify your message during this time...narrow, succinct, focused
- Provide Value – Serve as a resource, provide tools 'others have found useful' (social proof)
 - Being prepared, safeguard portfolios, take care of family





THE PLAN

Pay attention to language

Avoid pushy, scary words and phrases:

- » Hurry
- » Final wishes
- » Don't miss out
- » COVID-19/coronavirus
- » "How do you want to be remembered?"
- » "Have your best year yet!"
- » "Giving is contagious"

Match the mood:

- » Planning time
- » Catching up
- » Family first
- » Thank you!
- » Home
- » Inspiration
- » Planning tips


PRO TIP: Avoid ALL CAPS. No need to shout, especially now.



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- Home
- Explore
- Notifications
- Messages
- Bookmarks
- Lists
- Profile
- More

Thread

 Jessica Seltie
@jessicaseltie

This poem is called "First lines of emails I've received while quarantining."

April 11, 2020

The First Lines of Emails I've Received While Quarantining

In these uncertain times,
 all it's missing for me, essential,
 Are you willing to share your advice and wisdom?
 (As you know, many people are struggling.)

I know you are up against it
 the digital landscape.
 We share your concerns.
 As you know, many people are struggling.

We hope this some finds you and your family safe.
 We're never sure everything the day before.
 Here are 12 Essential Learning Tips!
 As you know, many people are struggling.

Feeling Public today? Happy Twin Tuesday!
 Celebrate that's a great thing a pandemic.
 Cheers! Expect their thoughts as their people are feeling that over!
 As you know, many people are struggling.


Count your blessings. Share your blessings.
 Don't forget to take a break up at sleep to your house!
 Cheers! Cheers! Cheers!
 As you know, many people are struggling.

How are you coping quarantine today?
 We're all in this together!

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ADAGE

ADOBE STUDY SUGGESTS CONSUMERS HAVE GROWN TIRED OF 'WE'RE WITH YOU' ADS



Takeaways

- Those messages made sense at the time, now put them on the shelf
- Utilize a different voice...perhaps a donor
- Focus on today and looking forward

Looking Forward

What Have We Learned? What Are We Still Learning?

Looking Forward

Things to Remember Now and in the Future

- It's ALWAYS about the list...now more than ever!
- Face-to-face meetings are gone for awhile – Opportunity to extend your discovery through **surveys**
- Importance of collaboration with internal teams
 - Include info on/link to "Emergency Student Fund", etc.
- Bequest/Legacy Challenge – Work with donor to pivot 'where the money' goes

Looking Forward

Legacy Challenges

Dear John,

As we are proud and grateful. Proud of our students, faculty and staff, and the resilience they have shown as we transitioned our learning to online in response to the COVID-19 pandemic. We are also grateful to the many friends and alumni who have reached out wanting to know how they can help.

If you are interested in helping students during this time, but concerned about having enough to care for your family, consider participating in the Legacy Gift Matching Challenge.

Join the Challenge!

Dear John/Janet,

Over the last few months, [Name] students, faculty and staff have demonstrated our vision of [Name]. We could not be prouder of the confidence and commitment shown as we transitioned to online learning this semester in response to the COVID-19 pandemic.

We are also grateful to our friends and alumni, many of whom have reached out to us during these uncertain times, wanting to know how they can help. We understand that right now, balancing family and giving can be difficult. That's why we are excited to announce a new way you can make a difference at [Name], without paying with assets you may need later by being a part of the [Name] Legacy Gift Matching Challenge.

In just a simple \$100 gift to [Name] on your will and verify as of your lifetime, matching funds equal to 50% of your gift (total up to \$10,000) will then be directed to us through [Name] Fund of your choice today. You can direct these matching funds to support a program at [Name] you are passionate about, or you can direct them to our Student Emergency Aid Fund, which is assisting students who may not have access to the strength of family, who lack stable housing, and more.

When you participate in the Challenge, you help [Name] students today, while also paying on us with having for the future. We are grateful and honored for the continued support we receive in these unprecedented times.

Please don't hesitate to contact me with any questions you have. Thank you.

Things to Ponder for Your Future Outreach

- Authenticity rules the day
- Is 'Humanity' the next big Marketing KPI?
 - Formality vs. Informality?
 - Candor vs. Professional?
 - Vulnerable vs. Bullet-Proof?
- Will Americans be more open to talking about their mortality, end of life plans, etc.?

The Jury is Still Out...

"Set It and Forget It" and Content Automation

- "Set It and Forget It" marketing can come back to bite you
 - Multiple Higher Education institutions came under fire for boilerplate emails
- Content Automation – Tread lightly
 - Hubspot, Pardot, etc.
 - Great tools, but, be weary that creating 'content journeys' years in advance can fall on deaf ears and even turn people off





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Q&A

Additional Questions?

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www.stelter.com

Additional Resources

The recording and the presentation slides

www.stelter.com/webinars



Thank you!

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Resources



<https://www.stelter.com/addressing-todays-marketing-challenges-covid>



Your Must-Have Guide for Communicating With Your Donors. Now

Learn the critical insights
you need to...

<https://www.stelter.com/white-papers/a-short-term-guide-for-marketing-planned-giving>

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