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Seeking Big Gifts During a Crisis

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**To all the nonprofits around
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You have risen to an unprecedented challenge – with flexibility, resilience, and innovation. Most of all, courage.

Whether a hospital, health center, or social service organization, many of you are on the “frontlines” of this pandemic, heroically keeping our families and communities safe.

Thank you.

To those of you not on the “frontlines” – the theaters, the museums, the churches and synagogues – you’ve provided creativity, art, and faith in unconventional ways at a time when it is needed most.

Thank you.

And to the schools, colleges, and universities – your commitment to students, learning, and research is inspiring.

Thank you.

**YOU’VE MADE US PROUDER THAN EVER TO BE
FUNDRAISERS**



Graham-Pelton

Seeking Big Gifts During a Crisis

With no end to the pandemic in sight, major gift officers and nonprofit leaders must find ways to keep the money flowing in by securing big gifts without in-person meetings. Such an idea was unthinkable just a few months ago, but now nonprofit executives are finding creative ways to cultivate, creatively thank, and even win big gifts from wealthy individuals during a time of social distancing.

Video conference calls — the primary way to stay connected to key supporters as the pandemic wears on — provide a few benefits that offset the loss of in-person interactions: cost savings, the ability to feature staff members working in distant locales, and more scheduling flexibility, to name a few. In this

collection you'll get real-world examples of nonprofits engaging donors across the miles.

Plus, you'll learn how three philanthropists altered their giving in response to these tumultuous times and get tips for capturing the attention of big donors. You'll also be inspired by creative ways savvy groups are recognizing and thanking donors from afar and get tips for building ties with wealth advisers and others who act as gatekeepers to wealthy individuals who open donor-advised funds.

Read on to learn how nonprofits are managing well despite the crises, making the most of technology without breaking the budget, and continuing to rely on smart strategies to attract and keep major donors in the fold.

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GETTY IMAGES

Tips for Getting Close to Those Who Manage and Open Donor-Advised Funds

By KELLIE WOODHOUSE

Whenever Christine Benninger reviews the volume of grants from [donor-advised funds](#) that her charity received last year, the numbers take her by surprise. “It’s really exploding,” says Benninger, president of Guide Dogs for the Blind.

Grants from donor-advised funds (DAFs) to the nonprofit increased from 47 gifts totaling nearly \$30,000 in fiscal 2018 to 205 donors who gave \$240,000 in fiscal 2019.

DAFs are irrevocable charitable accounts that allow donors to take an immediate tax deduction but disburse the invested money whenever they wish — it could be within the same year or many years later. Their popularity has grown exponentially in recent years, and charities are scrambling to figure out how to take advantage of the trend.

DAFs offer some advantages. In Benninger's experience, gifts from DAF accounts are typically larger than those given by traditional means, and they are insulated from economic trends, allowing donors to give at a time when they might otherwise curb their spending and charitable giving.

"Somebody has already put aside the money, and that's the big step," Benninger explains. "It's a lot easier to write a check for \$5,000 because the donor has already had the pain of taking that money away. There's a psychological aspect to it."

Yet, DAFs also present challenges for fundraisers. Because the tax advantage is available upfront, some donors may take years to disburse money from the fund, delaying it from reaching nonprofits that need support. Once a donor transfers money into a fund, the sponsoring organization (often a community foundation or the nonprofit arm of a financial-services firm) becomes the owner but almost always directs the money according to a donor's wishes. But some donors choose to be anonymous or to give through a vaguely named fund, which can make it difficult for charities to build relationships with them.

"It's challenging from a donor-cultivation perspective," says Benninger. Some sponsoring organizations, such as community foundations with a local focus, might pass along a message, recommendation or thank-you note to the donor who made the gift through the DAF. Others — often, large national shops with thousands of clients — are more reluctant to engage donors on behalf of charities and will make connections mainly at a donor's behest, if at all.

"DAFs are here to stay," Benninger contin-

ues. "We as charitable organizations have to figure out what the new normal is and how we work with that."

CONNECTING WITH GATEKEEPERS

Benninger estimates that 60 percent of DAF donors to Guide Dogs for the Blind are easily identifiable, allowing her to cultivate them directly — which is always her preference. "If we can get to the donor, that's so much more effective because you are not relying on somebody else to translate your message," she explains.

To reach those who give anonymously or through a fund with a cryptic name, it is especially beneficial to build ties with sponsoring organizations.

Steward program officers at small and mid-sized sponsoring organizations. Christy Eckoff, the chief foundation officer for the Jewish Federation of Greater Atlanta, suggests charities focus their efforts on community foundations and other small and medium-size sponsoring organizations that have a local focus. Such organizations consider it part of their mission to develop an intimate understanding of the community's charities and their donors' preferences.

"To some extent you steward these sponsoring organizations the same as you would the donor. Send them information periodically of what you are doing," Eckoff says. "Program officers have limited capacity as well. The more that you can proactively send them things they can read on their own, the better."

Invite program officers to see your work in action. Besides sending program officers information throughout the year — items such as event invitations, news updates, and annual reports — Guide Dogs for the Blind hosts representatives from sponsoring organizations for tours of its campuses. These visits establish relationships that pay off when grant officers interact with DAF holders.

"The program officers can't necessarily tell somebody who to give their money to, but oftentimes people will ask their thoughts," she says. "It's nice to have us at top-of-mind from that standpoint."

Create opportunities to interact with representatives of sponsoring organizations.

Julie Smith-Bartoloni, interim vice president for development and donor services at the Boston Foundation, encourages charities to get as much face time as possible with those who work at sponsoring organizations, especially those in the program and donor-services divisions. At community foundations, program officers spend the bulk of their time learning about local charities' work and impact, she says. Staff members in development and donor services often rely on program officers to keep them informed so they can offer donors giving ideas and approaches.

Find informal ways of interacting with grant officers. Take advantage of small events hosted by community foundations, which range from intimate coffee hours aimed at helping donors explore specific causes to a public rollout of foundation-commissioned research on regional issues. Use meeting rooms and other resources provided by community foundations, allowing for informal interactions with grant officers and staff that help keep a charity in mind. Attend annual galas and award ceremonies to meet donors and their advisers.

Some organizations have an open call for proposals — any charity can make submissions to the Boston Foundation's Open Grants Program, for example, and donors with funds at the foundation might take interest in a nonprofit by reviewing applications. Charities are encouraged to communicate freely and often with the Boston Foundation, whether that includes informal conversations or brief presentations. "When a nonprofit wants to come in and just get to know us . . . we relish that," says Smith-Bartoloni.

Ask community foundations for more details about the person behind the DAF.

Smith-Bartoloni recommends that charities reach out to sponsoring organizations if a DAF donor is listed as anonymous or is hard to identify. Her foundation, along with most other community foundations, will make

connections if the donor is amenable and pass along notes if the donor wishes to remain anonymous.

"We see our job as helping be a liaison between those who house their philanthropic dollars here and those who are doing work in the community," says Smith-Bartoloni, adding that the vast majority of donors who establish DAFs at the Boston Foundation want charities to know who they are. Donors "expect us to know the nonprofit community, and they expect us to make connections for them so they can make investments in the community."

Ask donors with a DAF to make introductions to representatives at a sponsoring organization. Benninger at Guide Dogs for the Blind has found it especially successful to ask an active DAF donor to introduce the charity to the sponsoring organization that administers the account. The donor is usually happy to make the introduction, and the sponsoring organization is often more open to developing a connection when encouraged by donors.

"We see our job as helping be a liaison between those who house their philanthropic dollars here and those who are doing work in the community."

"Typically you need some kind of in" to begin meaningful communication with grant officers and philanthropic consultants, Benninger says. It is particularly hard to build relationships with staff at national sponsoring organizations, which are responsible for the majority of DAF accounts in the United States.

Fidelity Charitable, for example, processed 1.5 million grants to nearly 155,000 charities on behalf of DAF accounts in 2019. Grants totaled \$7.3 billion, a 39 percent increase

from the year before. Fidelity does not typically recommend nonprofits to donors. Amy Pirozzolo, head of marketing for Fidelity, says the organization encourages charities to interact with donors directly.

It's not possible for national sponsoring organizations to be experts about every cause, says Eileen Heisman, head of National Philanthropic Trust (NPT). Donors' interests are simply too broad, she adds. (Organizations like NPT and Fidelity do offer limited philanthropic advising, but the service is usually reserved for their largest account holders.)

Tap into the financial advisory team. Jacqueline Valouch, head of philanthropy at Deutsche Bank Wealth Management, says that charities should consider connecting with all professionals who advise a donor, including accountants, wealth advisers, and lawyers. Wealth advisers who work at companies with a philanthropic mission and with legacy clients — large families with generous multigenerational giving plans, for example — are often engaged in giving conversations and decisions, Valouch says.

[To reach these professionals](#), charities can leverage or form an [advisory committee](#) consisting of financial and legal professionals. In addition to receiving valuable advice on philanthropic approaches donors may take, charities also can tap these individuals to connect them with financial advisers who want to be knowledgeable about nonprofits.

Charities should also ask existing donors to introduce them to their wealth-management teams. Nonprofit executives might also consider participating in membership organizations, such as estate-planning councils, to [network with wealth advisers](#), she says.

"If you are trying to capture a donor, you want to look at everyone who is surrounding that donor and working with that donor as an adviser," Valouch says. "You want to be part of the team that is working on that donor's philanthropy."

GETTING TO THE DONOR DIRECTLY

Pirozzolo says 97 percent of grants awarded by Fidelity in 2019 included a donor or fund name, and 88 percent included an address and donor name.

"People feel like we are a gatekeeper," she explains. "I would say, 'No, most of these donors are already giving to you; you just need to make sure you're recognizing who is giving through a DAF and make sure you are reaching out to them in an appropriate way.'"

"I tell people all day long, you ought to put those donors at the top of their stewardship and engagement list," Pirozzolo says. "You know that if they are giving through a DAF, they are already very charitably inclined and they have already set money aside."

Make sure processing departments carefully catalog DAF gifts. Checks might list a sponsoring organization as the donor, but they usually also include the name and address of the fund or the person who opened it. Despite the growth of DAF giving, experts say many charities are not tracking the gifts carefully.

Heisman, for example, directed a grant through her personal DAF account but never received a note of recognition from the recipient, a museum. When she called up the museum, she discovered it did not have a record of her gift, despite the fact that she disclosed her identity in the grant and, as a regular contributor, was in the museum's donor database.

Encourage donors to solicit friends who also have DAFs to use the features and advantages of their DAF accounts. Many DAFs, for example, can name charities as successors to the original donor. DAFs can also be used to set up recurring gifts — more than a quarter of the grants awarded by Fidelity in 2019 were part of a recurring or scheduled gift.

Winning Big Gifts — From a Distance

During Covid-19, fundraisers are turning to technology to interact with wealthy donors.

By **MARIA DI MENTO**



MANSURA KHANAM

No amount of technology can temper the uncertain fundraising landscape, says Rachel Barnard, founder of Young New Yorkers.

When the United Service Organizations wanted to reach out to big donors in May, it went out of its way to avoid staid reports and bring the organization's programs to life on a videoconference call.

Its regional vice president for Southwest Asia spoke from Dubai about the group's work in the region. The regional president of USO West in Los Angeles stood in front of the Mercy, the medical ship docked in that city, which at the time was providing medical support for the city. He told donors about the group's efforts to provide services to those working on the ship.

"It allows donors to so easily have access to what we're doing," says JD Crouch, the USO's CEO, who plans to continue to use video calls with donors. "I think it's going to allow the frequency of contact to go up, and it's going to allow us to pull people into the conversation from across our organization."

Just like the USO, other nonprofits nationwide are seeking alternative ways to reach affluent donors now that long-standing approaches like home visits, lunches, dinners, and other in-person gatherings may be out of the question for many months. Those donors are crucial to many organizations' survival plans because they aren't suffering the same loss of jobs and other income that's hitting the lower and middle classes especially hard. And experts say now that donors aren't distracted by busy travel and event schedules, this is the moment to build close and personal ties to them so they will give again and again.

Some groups are finding that old-fashioned techniques like a simple phone call work best in unsettled times, while others are creating educational sessions or thanking donors by video. Still, it's not clear what will work in the long run, especially because some nonprofit experts say wealthy donors might over time end up recoiling from an onslaught of so many virtual charity events.

"Because videoconferencing has now become integrated into so many parts of

people's lives and everyone is living on videoconferencing and getting tired of it, fundraisers are competing against that fatigue," says Lucy Bernholz, director of the Digital Civil Society Lab and a senior research scholar at the Stanford University Center on Philanthropy and Civil Society.

Some fundraising experts say to counter that concern, the wisest move is to focus on efforts that maximize interaction, a move they say may have been smart even in the days when big in-person events could be held.

Experts say now that donors aren't distracted by busy travel and event schedules, this is the moment to build close and personal ties to them so they will give again and again.

"When you're at a gala with 500 people, you only have a few minutes to really say hello and engage with a donor," says Sunil Oommen, a former fundraiser who founded a New York consultancy. "If you do it more one-on-one, the opportunity for relationship-building is that much deeper and the cost is much lower."

Oommen says fundraisers should also be planning for the long term since donors and prospects will be far less likely to allow nonprofit officials into their homes. And they'll need to discuss masks, hand sanitizer, and other precautions with people who do consent to visits. Those conversations will be less awkward for fundraisers who've established closer relationships with donors, he says.

NOT GOING SILENT

As fundraisers experiment with new ways to interact with donors, they're sometimes

venturing out of their comfort zones.

Jennifer Dow Rowell, development director of the Community Overcoming Relationship Abuse, a San Mateo, Calif., domestic-violence charity, known as CORA, is recording 60-second personalized videos that she emails to wealthy donors to thank them for their support and update them on the group's programs and clients. The response from donors has been positive.

"At first I thought it might be goofy, and then I realized it is absolutely the only way I can make eye contact with our donors at this point. It's the closest I can get to being in-person," she says. "They are not professionally polished; every now and then a cat wanders into the frame, or you can spot some workout gear in the background, but that's how our lives are now, and it feels very human. I have gotten great feedback; it isn't unusual for someone to email me back and comment on the video. I can also see when videos are replayed, something I doubt ever happens with voicemails."

Rowell continues to call big donors to update them as she normally would. But she says many fundraisers are unsure whether donors are up to hearing from them right now. Even the wealthiest philanthropists are dealing with personal issues and uncertainty brought about by the pandemic. Still, Rowell says, it's important to make the call, even if you're simply checking in to see how a donor is doing.

"They're supporters for a reason, and it's our job to let them know what's happening and to give them the opportunity to offer support if they can," Rowell says. "If it's a reduced amount, that's fine, and if they can give more than expected, then celebrate and honor that. But the last thing any of us should be doing is going silent."

Rowell recently heard from a donor who usually gives about \$100,000 annually and has now decided to give \$110,000 in each of the next three years. But she has also spoken with donors who plan to reduce their giving because they've lost money in the stock market.

"We recognize that this impacts everybody, including our wealthy donors, so we approach it from a place of empathy and understanding and also really clearly commu-

nicating the needs and how they can continue to support our work," says Rowell. "Even if it's in a modified way, we still need them on board with us."

BUDGETS IN FLUX

Young New Yorkers, a charity that provides art therapy and other programs to help young people accused of breaking the law, started using videoconference meetings with big donors several weeks before most people began working remotely. But founder Rachel Barnard doesn't know whether her group will continue to use video calls extensively after physical distancing ends.

Right now, she's most concerned about raising enough money to keep going and how the economy is going to affect what she can raise over the next year. She's using both videoconferencing and phone calls to try to

"Every now and then a cat wanders into the frame, or you can spot some workout gear in the background, but that's how our lives are now, and it feels very human."

confirm funding from existing donors and foundations for her group's next fiscal year, which starts July 1. A number of wealthy donors who confirmed gifts in the first two weeks of March called in May to say the ups and downs of the stock market changed their financial situation more than they had expected and they are rethinking whether or how much they can give.

"I've done five different budgets, and I've presented three to the board," Barnard says. "I'm constantly readjusting the likelihood of getting repeat funding."

That's something no amount of new technology or creative fundraising strategy can solve, she says. "Change is always an opportunity, but change also means

some things will inevitably be lost,” Barnard says. “I really don’t know how the dust is going to settle yet.”

A NEW PERSPECTIVE

Those unknowns are being keenly felt across the nonprofit world. The fundraising consultancy Marts & Lundy surveyed 200 colleges and universities, private schools, and health-care institutions, 85 percent of which said they had developed new ways to measure the performance of big-gift fundraisers since the coronavirus crisis started, disrupting the economy and putting big donations at risk.

Many of those surveyed said they see this time as an opportunity to “enhance relationships and refine donor strategies.” To emphasize that those priorities are important, nonprofits are revising performance measures to ensure they are evaluating fundraisers based on their work to build long-term ties to donors and not simply on how much money they raise.

Penelepe Hunt, a principal at Marts & Lundy, says that makes sense because “we know that when donors feel a stronger engagement and attachment to an organization, they tend to give more, so these deeper conversations will have a long-term effect.”

Fifty-one percent of the nonprofits in the report said the public-health crisis led them

to make greater use of digital tools to engage big donors.

Nonprofits that are using online tools reported more participation from donors in these online settings than they would normally see at in-person events.

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Hunt says nonprofits told her that donors who never attended in-person events are now showing up to virtual ones because it’s easier for them. They don’t have to get dressed up and travel to the event. She cautions, however, that Zoom fatigue is real, and charities can’t rely on online events to reach donors unless the events are creative and interesting enough to hold people’s attention.

“If you put on a boring Zoom call, no one will come to it just like they won’t come to a boring gala,” Hunt says. “It’s got to be something that engages them.”



CLEVELAND AVENUE

Liz Thompson increased her giving when the pandemic struck but also helps charities get the word out about their missions to make it easier to attract other donors.

3 Big Donors Talk About Giving in the Time of Covid, Racial Unrest, and Recession

By MARIA DI MENTO

When the pandemic hit back in March, Chicago area philanthropist Liz Thompson knew that the charities she and her husband, Don, support through their Cleveland Avenue Foundation for Education would likely see a big drop in donations while the needs of the primarily low-income students of color it serves would only grow.

“The first thing we thought about was how can we leverage the resources and the assets we have and what can we do uniquely in order to help the most people,” says Thompson, whose foundation also provides professional development and mentoring programs for adults who want to advance in their careers.

So she and her husband increased their giving to the college-access and career-readiness groups they regularly support through the foundation, a charity that they fund but that also raises money

from others. Thompson also got to work making the most of her business and non-profit networks in an effort to encourage others to donate and to help nonprofits get the word out about their missions.

The Thompsons have an extensive network of contacts from which to draw. She worked for the Ameritech Corporation for a decade before moving on to lead nonprofits, and he retired as chief executive of McDonald's Corporation, the fast-food chain, in 2015. Together they founded Cleveland Avenue, a venture-capital firm.

Liz Thompson serves on the board of a large outdoor-advertising firm and saw that many of the company's billboards were sitting empty because businesses were spending less on advertising in the wake of the pandemic. Rather than wasting all of that space, she worked with the firm to place public-service announcements about charities on its vacant billboards. She got the firm to advertise not only the work of the nonprofits her foundation supports but other local charities as well, including groups that were helping local organizations understand how to get assistance from the Paycheck Protection Program.

"For us, it's not a matter of getting more involved than we already are seven days a week," Thompson says. "What has changed is we've been paying more attention to where the education landscape intersects with other issue areas."

The economic freefall and the racial inequity laid bare by the pandemic and recent protests have spurred many wealthy donors to step up their giving. For some, that has meant giving more money to charities they've previously supported.

"We definitely saw that in March and April the volume of grants [from donor-advised funds] was two times the previous year's," says Kate Guedj, chief philanthropy officer at the Boston Foundation.

Most wealthy donors are getting bombarded with requests for donations from charities. Many philanthropists want to make a big difference, but the unprecedented amount of need has left some of them overwhelmed and unsure how to do it, says

How to Get the Attention of Wealthy Donors

Organizations that can synthesize information about how the pandemic and social unrest affect the lives of the people they serve and then get that information to donors quickly will have the best chance of capturing donors' attention. It's also critical to let donors know exactly what your group needs to do its work.

Communication, however, needs to be authentic rather than highly curated or overly distilled. Otherwise, it could come across as phony marketing copy. Donors are more likely to respond when a letter or email sounds genuine.

Let donors know when large pledges fall through because supporters had to pull back on their giving. That doesn't mean you name them. But it is OK to let other donors know the organization is worried about how to make up the shortfall.

Don't overdo the calls and emails to donors. It is good to let donors know what your organization is doing and what it needs, but don't hound donors with multiple requests for gifts. Many are dealing with their own concerns about elderly parents, children at home, and their businesses.

Don't assume that the wealthy donor you talked to a year ago is still as wealthy — or in the same frame of mind — as the last time you spoke. Some rich donors have been hit hard by the economic fallout of the pandemic and may not be able to give as they did in previous years.

Keep in mind that some donors may have lost loved ones to the pandemic. Approach them with care and from a place of concern before sussing out whether to ask for their support.

Guedj. That's why it's important that non-profits understand what wealthy donors are thinking when they are considering how and where to give, she says.

"What they're concerned with is twofold: They want to give to immediate needs and to rebuilding from the disasters of the multiple pandemics we're facing," says Guedj. "They also have a real clear devotion to the organizations they've been giving to already, so I counsel nonprofits to deepen their relationships with their existing donors. Deepening those connections at this point is paramount."

LETTER-WRITING CAMPAIGN

Avery Tucker Fontaine, who leads BNY Mellon Wealth Management's strategic philanthropy division in Atlanta, is advising seasoned philanthropists to do more than just write checks.

Thompson's efforts are a good example of the kinds of nonfinancial resources Fontaine says wealthy donors can offer to struggling charities. Fontaine counsels rich philanthropists to take the time to learn what kind of special aid charity leaders need most. That could mean offering to co-sign for a loan or helping a nonprofit leader think through ways to overcome a cash crunch, she says.

"Donors should be direct and ask nonprofit leaders what's giving them heartburn, what's making them concerned about the future of the organization, and if they could ask for anything, what would it be," Fontaine says.

She is circumspect, however, about encouraging wealthy donors to ask their peers directly to support their favored charities. Few rich donors, even in the face of the ongoing pandemic and intensifying social unrest, are comfortable in that role, she says.

"That is the hardest thing to do, bar none," Fontaine says. "There is a unique personality who is comfortable and good in that area."

Thompson says she doesn't usually raise money directly from her peers, but now is different. Because this is such a difficult time for the charities she supports, she is

"100 percent comfortable" tapping other wealthy donors to give right now. "I know in the end a whole lot of young people are going to benefit," she says.

She isn't simply asking one or two rich friends. Thompson started a letter-writing campaign in late April, driving other donors to her foundation's website and linking them with the roughly dozen charities the foundation supports. Thompson says she wrote one letter a week for six weeks. Each letter highlighted the work of two or three of the foundation's grantees. Donors could give to the groups by contributing to Thompson's foundation or they could give directly to the charities.

While she wasn't able to track how much the charities have collected directly, Thompson says the foundation raised several thousand dollars for grantees from that letter-writing campaign, which was more than she expected. She thinks the healthy response was the result of two things.

"Number one, everyone was feeling the urgency of the moment, and, number two, quite honestly, people give to people. As philanthropists, we know that," Thompson says. "When I have a colleague or a partner on a board and they reach out to me to give, I know them and how thoughtful they are on an issue and how much they vet an organization, so I'm tons more inclined to give if they ask, and I think that's what happened with us."

CALL TO GIVE

Many big donors say they feel an extra weight of responsibility to do more than at any other time in their lives and to push other philanthropists to do the same.

"To stand by and do nothing would be horrifying," says Jean Shafiroff, a New York philanthropist who is known on the city's charity gala circuit as much for her fundraising moxie as she is for her colorful couture ballgowns. "Those who have the resources have an obligation to give during all times — but especially right now, we really have an obligation to try and be as helpful as we can."

Shafiroff serves on the boards of six non-

profits. While she declined to say how much she and her financier husband, Martin, have donated to charity personally, Shafiroff estimates that she has helped raise at least \$10 million for the various charities she has been involved with over the years.

One of the main ways she does that is by connecting nonprofit leaders to other wealthy donors at the formal charity galas she so loves. Shafiroff says it has been harder to make those kinds of introductions since the pandemic hit and galas have been put on hold or shifted to smaller online affairs. That hasn't stopped her, however, from finding alternate routes to encourage people to give to charity.


One of those is a weekly public television show about philanthropy where she high-

lights the work of charities by interviewing their leaders. A recent segment featured Ana Oliveira, the head of the New York Women's Foundation, a nonprofit Shafiroff has supported for a number of years. During appearances on network television and New York area radio shows, she also urges donors to help nonprofits that are struggling because of the economic fallout from the pandemic, and she talks about the ways people can help their local charities.

And Shafiroff hasn't given up on galas completely. She says while virtual charity galas may not be as much fun as the real thing, they're still useful fundraising tools and ways for charities to keep donors engaged.

"There's a tremendous place for the virtual

MICHAEL PANICCIA

A full-page photograph of Jean Shafiroff standing in a grand, ornate room. She is wearing a strapless, floor-length white gown with a voluminous, ruffled skirt and a long, flowing train. She is looking over her shoulder towards the camera. The room features a large window with light blue curtains, a grand piano on the left, and various pieces of antique furniture and lamps. The walls are covered in patterned wallpaper.

Jean Shafiroff normally connects nonprofit leaders with other wealthy people at galas, but during the pandemic, she has had to find alternative ways to encourage people to give.

gala because it brings people together, and it keeps that cause in the minds of people who attend,” she says. “It provides a way for people to stay connected and to give and a way for charities to keep people up-to-date about what they’re doing.”

Since virtual galas can’t provide Shafiroff with the same natural, in-person opportunities to introduce a charity leader to wealthy potential donors right now, she has taken to doing more direct fundraising and simply trying to keep in touch with other big donors by email and telephone. She says while she tries not to push people, she has primarily turned to philanthropists she knows have foundations because they have been easier to ask since they are required to give away a certain amount of money every year. And for those who say no?

“It’s best to just thank them very much for their past support and then say, ‘Well, perhaps you’ll consider donating next year,’”

Shafiroff says. “Not everybody can give to every cause, and it’s all about courtesy and respect and understanding.”

‘A LITTLE BIT PARALYZING’

One reason some major donors might say no when asked to give is the sheer volume of donation requests they are getting from charities right now.

“It’s very difficult because you kind of want to give money to everybody, and you can’t,” says Lisa Greer, a Los Angeles philanthropist and businesswoman who, along with her husband Joshua, has given about \$4 million to charity in the last nine years. “Making those choices is more than frustrating; it’s a little bit paralyzing actually.”

Greer’s charitable response to the current crises has been wide-ranging. In the early days of the pandemic, she and two friends created the Greater Los Angeles Hospital



COURTESY OF LISA GREER

Lisa Greer has taken a scattershot approach to giving — contributing to charities she hears about that are helping people in dire need.

Registry. The service allows area hospitals to list the personal protective equipment their medical staff needs. Donors can give directly to specific hospitals or to a group that works with vendors to get supplies like N95 masks, medical gowns, and gloves to medical centers.

Greer and her friends saw that although many donors were giving to help hospitals buy protective gear, hospitals in the wealthiest parts of town were getting more donations than those in low-income neighborhoods because, Greer says, the wealthy were giving only to the hospitals they knew about. The registry was an effort to encourage equity and has so far raised more than \$275,600, mostly from individuals and corporations.

When it comes to her personal giving, Greer says she is taking a scattershot approach — giving when she hears about a charity that is helping people in dire circumstances.

“Major donors should be giving to people in their community, whether that’s in their city or to their religious community, but give to the people who are not getting enough money to put food on the table or are struggling to put a roof over their head,” Greer says. “That’s the most pressing thing right now.”

Greer says she also looks to what other wealthy donors are supporting to make decisions about where to give. She credits the staff at the Progressive Jewish Fund, which administers her family’s donor-advised fund, with providing regular updates and information about a variety of charities and social-justice groups that other

donors with DAFs are backing.

“It makes you feel like, ‘OK, I’m not here on my own trying to figure it all out.’”

Greer says. “These groups have been vetted, and other people are supporting them.”

“Not everybody can give to every cause, and it’s all about courtesy and respect and understanding.”

NO STRINGS

In response to an onslaught of donation requests in recent months, Thompson says she and her husband, who usually make contributions of anywhere from \$500 to \$1 million, have increased their support by giving a little more and giving sooner this year than they had planned — both to the organizations they back through their foundation and to the other types of charities they support, including groups that address food and housing insecurity.

Thompson, a former executive director of two nonprofits — City Year Chicago, and an Early Head Start Montessori school in Denver — is also sticking to her commitment to give without placing restrictions on her donations.

“Having led two different nonprofits, I know the value of unrestricted gifts,” she says. “The best thing I can do is say, ‘Here’s my support. Use it as you see fit.’ ”

How to Thank Donors During a Crisis

By LISA SCHOHL

In the months ahead, most fundraisers plan to focus on keeping supporters rather than finding new ones, according to a survey released by the Association of Fundraising Professionals.

To keep donors giving, it's critical to make them feel appreciated and connected to your cause, experts say. Yet it can be tough for fundraisers to prioritize donor-relations efforts at a time when many groups are struggling to cover operating costs and meet a swelling need for their work due to the

pandemic and the ensuing financial crisis.

Amid these challenges, some organizations are hurrying to solicit gifts from donors without making as much effort to protect the long-term relationship, says Lynne Wester, founder of Donor Relations Guru, a fundraising consultancy. "One of the things nonprofits have to consider is that we're in it for the long haul and that relationships happen and unfold over many years and decades," she says. "So thanking donors — and even more than thanking, telling them what

ISTOCK



their money is doing — is really important.”

It’s vital to do this as urgently as you ask for support, Wester says. “If you’re saying this is an urgent need, then you need to spend and report back on the money probably within weeks and not months,” she says. “But especially you should report back before you ever ask for any more money.”

It’s typically best to share updates using the same method of communication that a donor uses to give, Wester says. Many groups are relying mostly on digital communications these days because of the pandemic. If your nonprofit is one of them, try to incorporate videos and photos into your messages when you share results, she suggests, rather than just sending an email with text.

Here are more tips from a variety of fundraising experts that can help you thank and stay in touch with your supporters during these trying times so they’ll keep giving even after the crisis ends.

Be vulnerable. Whether you are writing a fundraising appeal or a thank-you letter, you should adapt the tone of your message to reflect what people are experiencing and how they are feeling, says Lisa Sargent, a fundraising copywriter and donor communications consultant. “What I tell people is, you say the bravest, truest thing that you can,” she says.

A thank-you letter that Sargent recently wrote for ChildVision, an educational charity in Ireland, offers an example. “It was simply a thank-you, from the heart of the CEO to supporters,” she says. In the letter, chief executive Brian Allen explains how the organization is continuing to help blind children and their families during the pandemic. He recognizes that he can’t predict how the crisis will affect ChildVision’s work moving forward but promises to share an update as soon as he knows more. “But for today, I just want to say thank you,” he says, and lists several specific things for which the group is thankful. The letter ends with a postscript that provides information about how to give but adds, “please know that you should never feel pressured to donate, by any charity.”

Put donors at the center of your message. “Some of the old [recommendations] tend to rise up during struggle,” Wester says. “And

that is, you know, stop talking about yourself. Keep talking about the donors and their experience.” Don’t assume you know what they are going through, she says, but show empathy and acknowledge that this is a “scary” time for donors and the nonprofit.

This includes recognizing that millions of Americans are unemployed, underemployed, or furloughed, she says. Don’t communicate as though people owe your organization a gift.

Thank supporters quickly or explain why you couldn’t. Sargent suggests saying thanks within about 48 hours of receiving a gift because this may increase your chances of getting another one. If your process has been delayed or altered because of the crisis, she says, acknowledge that in a warm way and explain the reason for the change.

“I would recommend every single nonprofit try to go to their website and make a test donation and watch what happens.”

For example, in the early weeks of the pandemic, some nonprofits were taking longer than usual to thank their direct-mail donors because the staffs couldn’t go to the office and open mail as regularly, Sargent says. To address this, her clients added a postscript to late letters that apologized for the delay and explained that many of their employees were still working from home.

Improve your online acknowledgment process. “I would recommend every single nonprofit try to go to their website and make a test donation and watch what happens,” Sargent says, “because a lot of times you can identify cracks in the armor there.” Make sure that a page appears after a gift is made — what Sargent calls a “redirect page” — with a warm message of appreciation, not a dry confirmation notice.

In addition, send a thank-you email to

people who give online, and if you have their permission, a direct-mail letter, too. (Getting supporters to communicate with you on more than one channel can lead to greater giving and loyalty, Sargent says.)

Call your donors just to say thanks. This gesture can help foster long-term relationships with donors and can even boost giving, says Michelle Powers Keegan, chief development officer at the Ronald Reagan Presidential Foundation and Institute. The organization supports entities including a library and a museum, which have been closed during the pandemic. To help preserve jobs, the foundation enlisted employees in departments that were affected by the closing, such as visitors' services, to help fundraisers make thank-you calls to donors. The team has since made nearly 15,000 calls, which have been received very well, Keegan says.

Once donors realize the representatives are calling just to say thanks rather than to ask for money, Keegan says, they often open up and share things they have been going through, including having the virus.

These efforts are paying off, she notes. "We have had everything from someone in the middle of a thank-you call saying, 'I'd like to make a gift to you right now' to people sending in gifts."

Nurture new donors. Sargent says some of the people who give for the first time during the pandemic may be "crisis donors" — those who are moved to give in response to great need. It can be hard to get these supporters to contribute again, she says, but you should still have a plan for thanking and cultivating all new donors so you can hold onto as many as possible.

Don't ask new supporters for another gift in your thank-you message, she says. "But you have to have some way to try to foster a connection with them, report back to them, welcome them, and then give them the opportunity to give again once you've done those things right."

For example, after you thank these donors, you could send them a letter with a copy of a recent newsletter. "That's pretty quick and easy to do right now for a small staff," Sargent says.

Recognize key donors generously. You may want to reconsider how you define major gifts this year, says Rachel Cyrulnik, principal at Raise Nonprofit Advisors, a fundraising consulting firm. "Someone who gives \$25k is like the new \$100k [donor], at least for this year," she says. "So, treat them like a \$100k donor."

One of Cyrulnik's clients plans to organize "mini recognition events" to thank certain key donors for maintaining their giving level this year. Depending on the geographic location, the event could be a 20-minute Zoom call or a socially distanced visit to thank the supporter with her family, or whomever she wants to invite, and talk about her vision for the nonprofit.

Another organization had planned to hold an appreciation event for its capital-campaign donors this summer, Cyrulnik says, but now plans to send a few top leaders to donors' homes to personally thank them and share an update on the project. "I think when it comes to solicitation, we're always happy to go out and bring whoever is needed, but [it's important] to kind of deploy a thank-you team for recognition as well," she says.

Show appreciation for loyalty. Don't just thank donors who make a new gift or give more, Cyrulnik says. Those who keep giving at the same level are critical for budget planning and should be thanked, too. "Call out that 'you've maintained your gift even in a difficult environment, and we really appreciate that,'" she says.

If your organization lists supporters who give over a certain amount, she says, consider doing the same for people who have continued to give at the same level as before, no matter the amount. This can help motivate them to keep contributing, she says.

Provide hope. Share good news, Wester says, rather than focusing heavily on things your nonprofit and community have lost during this crisis. "People want hope," she says. "So, what are the actions we're taking to deliver that hope? And what are the things we're doing to kind of be the stable force during the storm?"



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