

Best Practices for Maintaining Donor Engagement During the COVID-19 Pandemic

The coronavirus (COVID-19) has had a wide-reaching and disruptive effect on individuals, businesses, and entities. COVID-19 was declared a pandemic by the World Health Organization on March 11 and as of March 16, 2020, has afflicted more than 167,000 individuals worldwide, with the United States confirming over 3,400 cases as of March 16.¹ The Centers for Disease Control and Prevention (CDC) has asked individuals to practice social distancing as part of a community mitigation strategy. As a result, many employees are working from home, schools and universities are closed, and restrictions on travel are in place. These measures, while helping to contain the virus, will certainly impede global productivity.

Nonprofit organizations are an important pillar of the global response to the pandemic, whether through helping to provide free meals to students home from school, services to senior citizens, or all-important medical supplies to those in need or on the front lines. As a result, nonprofit organizations are likely to feel the impact of this crisis through new and challenging fundraising obstacles, heightened portfolio volatility, or calls to action within the community. Organizations must continue to engage their supporters in these arduous times and should consider innovative practices to overcome the social constraints presented by the virus. We will explore some strategies for nonprofit organizations to maintain fundraising efforts as they navigate this difficult environment. All organizations' missions remain important, and we understand that fundraising is a critical part of keeping these missions going.

Current Landscape — What Is Changing?

Each community is unique, and some demographics may be affected by the coronavirus more than others. Without knowing how a particular individual might

feel psychologically regarding the virus, or their given level of physical vulnerability, we recommend erring on the side of caution with all interactions.

In-Person Meetings Are Out

The CDC suggests implementing social distancing measures. Face-to-face exposure, whether through one-on-one meetings or larger gatherings, is strongly discouraged. In fact, the CDC recommends that high-risk populations consider canceling all gatherings of 10 or more people. The CDC has identified high-risk individuals to include older adults and those with underlying illnesses including heart disease, lung disease, and diabetes.²

For nonprofit organizations, it might be necessary to postpone galas, charity events, and other large gatherings where individuals would be in close proximity. It is likely these events will not be practical for the foreseeable future. PNC, for example, has decided to refrain from scheduling or rescheduling events until there is more clarity on the impacts of the virus, and we would recommend this as a best practice.

Travel Restrictions

Many companies have enacted travel bans for their employees. This includes travel for internal or external meetings by plane, train, or other public transportation. The US Department of State has also warned against any leisure travel, strongly encouraging individuals to postpone vacations and cancel flights.³

President Donald Trump started with restrictions on entry to the United States from China, Iran, and other afflicted countries, and has since extended these restrictions to most travel by non-US citizens or permanent residents into the United States. Similarly,

¹ "Coronavirus Disease (COVID-19) Outbreak," <https://www.who.int/emergencies/diseases/novel-coronavirus-2019>.

² "Implementation of Mitigation Strategies for Communities with Local COVID-19 Transmission," <https://www.cdc.gov/coronavirus/2019-ncov/downloads/community-mitigation-strategy.pdf>.

³ "Global Level 3 Health Advisory – Reconsider Travel," <https://travel.state.gov/content/travel/en/traveladvisories/ea/travel-advisory-alert-global-level-3-health-advisory-issue.html>.

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other countries have taken steps to restrict or ban foreign travelers from entering their countries.⁴ Speculation has also started that “shelter in place” warnings (like the one in San Francisco area) could extend to other parts of the country, limiting even domestic travel. With that in mind, we believe it might be prudent to cancel or reduce future travel plans where possible and create work from home strategies.

Cyber Security

Scams and phishing schemes become even more common when there is disruption in daily communication. Cybercriminals may look to leverage the elevated emotional state of your supporters to obtain their personal information through tactics such as donation scams, where it appears as though they are trying to raise money in your name.

It is essential that nonprofit organizations increase their outbound communication with donors: if you tell them how you are raising money, they may not be as likely to fall for the illegitimate tactics of fraudsters. Further, remind your donors not to respond to any unidentifiable email addresses or phone numbers; if unsure, they should reach out to your organization directly.

Reduced Incomes

Unfortunately, some businesses, individuals, and foundations may scale back their philanthropic efforts as they are faced with budget constraints and market losses stemming from the crisis. Specifically to the three major donor types:

- Corporations often make their charitable donations through profits, and we anticipate this virus will negatively impact the bottom line for many businesses. With tighter top-line revenue and resulting margins, there is the very real chance that corporations will have less to allocate to charity.
- As a result of current events, discretionary bonuses may be lower, unemployment might rise, volatile stock markets could reduce household wealth, and many workers may experience a cutback on hours. All of this

spells the potential for lower charitable giving by individuals.

- Foundations, which give a portion of the market value of their assets each year, might have less to give as a result of market volatility.

Nonprofit organizations must prepare for these potential pullbacks when forecasting. While some donors may not be able to make a donation currently, their philanthropic values likely have not changed: if you stay in touch with them now, they will hopefully be able to contribute when the economy and markets recover.

Alternative Options – Going Virtual

While the coronavirus interrupts normal operations, there are many ways to continue connecting with your donors without compromising anyone’s health. Organizations should look to use technology and other adaptive communication methods to engage donors. In this section, we discuss some best practices for alternative approaches to in-person meetings that can be effective to continue the conversation.

Phone Calls

Now, more than ever, it is important to proactively reach out to donors. Call to inquire if your donors and their families are safe, which will show them you and your organization appreciate them. It is during times like this when strong, lasting relationships between you and your donors are built. Additionally, phone calls offer a way to keep conversations going without making donors feel conflicted between health and charity.

We would recommend, if possible, calling each of your larger donors at least once. In those calls, follow the best practice of focusing on them, their family, and their health, as opposed to specifically asking for a donation. If you work on the relationship, the donations will likely follow.

Video Chat

In addition to the benefits of phone calls, video chat could provide the face-to-face component that is particularly important for first meetings. Virtual meetings allow

⁴ “Current Outbreak of Coronavirus Disease 2019,” <https://travel.state.gov/content/travel/en/traveladvisories/ea/covid-19-information.html>.

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donors to put a face to your organization and set the foundation for a more personal relationship.

There are a number of platforms that allow video chat, so we recommend exploring options that will work best for your organization (if you don't already have one). We also recommend testing these platforms extensively before the first external meeting.

Email

As mentioned earlier, we recommend limiting physical contact as much as possible. While "snail mail" is an easy way to send information, the fact that it is handled by multiple people before arriving in the donor's mailbox could cause concern. By sending items through email instead of the postal service, you are able to distribute updates to your donors without having to worry about their peace of mind.

Social Media

If your organization does not already actively use social media, now would be a good time to start. Social media provides an easy way to stay engaged with existing and prospective donors. Posting on the different platforms can be a free and easy way to keep your mission in front of your donors. Furthermore, adding money to the strategy through paid promotions can allow you to reach the newsfeeds of target audiences or demographics that might not otherwise have seen your content.

Webinars

As a replacement for in-person events, webinars are a good way to reach donors with informational updates. It is obviously not the same as a charity gala, a golf outing, or other fundraising events, but it can help keep donors engaged with your organization

and its mission. An important thing to keep in mind is that donors are worried by current events and attention spans are likely to be low. We recommend targeting 30 minutes or less for your update and try to make it as interactive and open to questions from the audience as possible.

Conclusion

If you are successful in your fundraising efforts, rather than a traditional handshake over a check, it might make sense to keep six feet of distance or more with an ACH payment option. It is important to make sure your organization has the technology and/or banking partner to enable this and make sure that it is accounted for properly with all relevant federal and state-level regulations.

The past month has been marked by increasing volatility and uncertainty. Because no one knows the full impact of COVID-19 or how long the crisis will last, we should prepare for prolonged disruptions in daily operations. Fundraising efforts remain a primary way to meet the needs of a nonprofit's budget, and proactive outreach is increasingly important in difficult times. In light of this, we have recommended alternative communication methods that can help your organization stay engaged with donors.

A quick internet search can help provide your organization with articles and guides that provide in-depth strategies and best practices, often free of charge, that you can leverage to help your organization go virtual. Let the silver lining of the current quarantine be your organization building its digital muscles for the current and future philanthropic landscape. Most importantly, in this difficult time, know that our thoughts are with you, your families, and your organizations. We hope for a quick resolution to the crisis.

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