



Leading Through **COVID-19**

PLANNED GIVING DURING A TIME OF UNCERTAINTY

“Every little thing counts in a crisis.”

JAWAHARLAL NEHRU

The attacks of 9/11 and the 2008 Great Recession showed philanthropic organizations how important it is to JUST BE with donors during times of uncertainty. Philanthropy officers may have anxiety about what appropriate outreach and conversation should be during this pandemic. This is a time to show empathy and put yourselves in the shoes of your most loyal donors—a special group that views your organization as an extension of their family.

Here are some important things to keep in mind when reaching out:

Communication Be cognizant of how donors prefer to communicate and reach out through those channels. Many planned giving donors may not have immediate family with or close to them. At a time when people are isolated from each

other, your outreach can be the day's highlight. Depending on their technology abilities, this is a great time to propose a virtual video chat while social distancing is enforced.

Family Situation Many planned giving donors belong to the “sandwich generation” and may be increasing their emotional and financial support for their children, grandchildren and elderly parents. Lending an empathetic ear can foster an authentic and supportive relationship.

Emphasize Mission Focus on what your organization is doing to prepare and overcome the situation and how the community is stepping up to support your mission. Providing relevant facts and stories of heroism can help alleviate questions about how this crisis is being addressed locally, contributing to the overall mission.

Let Them Vent Planned giving donors are the most vulnerable during this time of uncertainty, and their fear may be expressed through emotion. Some donors may have a heightened sense of frustration with politics, health care and the economy, and want to express their concerns. It's critical that you remain neutral, a true test of your ability to purely listen without instilling your own opinions.

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**You never know when a moment
and a few sincere words can have
an impact on a life.**

—ZIG ZIGLAR

Celebrate Their Impact Revisit and celebrate their history with your organization. Thank them for their commitment to the organization, and, if appropriate, how they have influenced others to support your organization. This may be an opportune time to ask about their thoughts on featuring their personal story of commitment in future marketing materials and donor testimonials.

Life Income Donors Charitable gift annuitants tend to be your more conservative donors and may have concerns regarding your organization's long-term commitment. It's a good idea to prepare dialogue that provides assurance regarding the stability and future plans of your organization. Life income gifts, such as charitable trusts, may be impacted by the financial markets and, if your organization is serving as trustee, it's best to be prepared to address any concerns.

Gift Conversations After key life events such as changes in health, finances and family situations, people often revisit their plans and medical health directives. A significant uptick in new donor bequests were made after 9/11 and the 2008 recession. Don't make assumptions here. If you had previous conversations about their potential commitment to your organization before the COVID-19 pandemic, refer back to

this conversation when it feels appropriate. During times of crisis, people may have a more compelling need to support your organization and seek the relief of having their own financial and estate plans in place. Some giving decisions provide resolve during this time of uncertainty.

Check in Again Many planned giving donors are not annual or

major gift contributors and often fall to the wayside when it comes to proactive stewardship and continued outreach. Although some may prefer it that way, most will appreciate a follow-up note or call offering them the opportunity to check in again.

During difficult times, nonprofit organizations need to proactively face anxieties and sensitivities around donor outreach. Don't fall victim to the pandemic of fear. Keep in mind your planned giving donors most likely elevated your organization to the status of family when they committed their gift. Whether you talk to them directly or send them a note, they will be thankful you thought of them and care.

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