



Leading Through COVID-19

EVOLVING PHILANTHROPY IN A DIGITAL WORLD

COVID-19 has illuminated many new opportunities to refine and expand philanthropy practice. Organizations were forced to innovate and evolve to continue their work. However, many of the recently adopted practices are not just valuable as stopgap efforts but should be integrated long term as they have enabled us to expand our reach and impact in ways that were previously not possible.

VIRTUAL VISITS

Prior to COVID-19, the number of philanthropy professionals participating in virtual visits was basically negligible. Our focus has always been on meaningful personal interactions; however, we have always assumed those needed to be face-to-face to be valuable. Many organizations also hesitated over using digital modalities of communication because it seemed

to be inaccessible, uncomfortable, awkward or disrespectful for some of those we engage. This perception clearly changed amidst COVID. Now, progressive health care philanthropy executives have made a mainstay of virtual visits, consistently and digitally connecting with their donors.

Surprisingly, many have found donors to be more at ease, more focused and more forthcoming during these visits. Executives have also seen a dramatic acceleration in the number of visits they can complete in a day, moving from one teleconference meeting to the next without the investment of travel time.

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enhance this newfound tool to be respectful, productive and meaningful for donors? We must ensure we structure these visits to feel warm while also advancing meaningful conversations. We need to take advantage of the new opportunities these venues offer to easily share images, videos and other collateral while online. Finally, we must ensure the virtual visit is embraced within our metrics system to demonstrate these substantive and intentional interactions are advancing relationships.

While health organizations utilize a cadre of digital tools—from electronic communication to social media pages—to engage their donors, many are less than strategic. However, the pandemic elevated the importance of digital platforms. Digital communications became the primary, and sometimes the only way to reach donors and other constituencies. Many organizations were unprepared and found themselves ramping up their digital presence quickly. Significant lessons and strategies can be taken from this experience. Organizations must create a formal strategic communications and donor engagement plan that addresses the strategic pillar of these platforms. Digital is an inexpensive, democratic and necessary way to communicate quickly with both select audiences and broad constituencies.

WORK FROM HOME

One of the ironies of the shift to working from home is that philanthropy executives have rarely been successful when tethered behind a desk at work. The most meaningful portion of our days and efforts has been focused on being with donors. Being in office brought significant value, often to the detriment of getting outside with donors where we belong. COVID certainly changed that. The vast majority of people are now working from home and successfully demonstrating effectiveness outside an office. Working from home can increase focus and decrease the wear and tear of commute times. It honors that we can add value without regular time

in the office. From executives to gift officers to the entire team, organizations should be out interacting with donors to move relationships forward.

INFRASTRUCTURE AND DATA

March office closures brought concerns around accessing donor data and performing simple functions like check processing. Some organizations remain dependent on data management programs hosted on a local server, only accessible within the office environment, and also likely remain dependent upon physical checks from donors. COVID has illuminated opportunities to rethink data management and infrastructure. First, organizations that have not already moved to a cloud-based donor data management platform should do so now. Leading software vendors can help, allowing databases to be accessed from the office, over a home computer or through an iPad in your car, offering agility, flexibility and value.

Organizations are using lockboxes to receive checks, helping them to better continue their work during the pandemic. They rely upon electronic reports rather than manual handling and processing of checks. These new logistics must be part of future plans.

Philanthropy is a noble profession that will always be advanced through quality relationships. However, the pandemic has demonstrated there are more ways to cultivate relationships than previously considered. As organizations move toward recovery, it is vital to consider what innovations and evolutions of practice should be ingrained in our work going forward.

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