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## ***GENERATION ZOOM: OPPORTUNITIES FOR FUNDRAISING LEADERS***

*Virtual donor engagement in times of Covid-19*

*By Tanja Sarett, CFRE, CVF*

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### ***PART 1***



*There is finally a light at the end of the global pandemic tunnel. The vaccines are being rolled out. And yet, as fundraisers and organizational leaders, it will take us well into the summer and fall of 2021 to reopen our traditional donor cultivation and engagement toolbox.*

## ***GENERATION ZOOM: OPPORTUNITIES FOR FUNDRAISING LEADERS***

The question is, how can we turn lemon into fundraising lemonade during this ongoing health crisis? How can we continue to pivot and innovate to build and deepen relationships with those who help our Jewish organizations thrive? How can we expand our toolkits for the virtual environment?

This is an invitation for fundraising professionals, nonprofits, and congregations to build on this year's successful online outreach to donors and funders. And it invites professionals and lay leaders to go further: to tap into the unique opportunities of cultivating supporters in the virtual space by designing engaging and interactive experiences.

### ***From Online Events To Virtual Cultivation Experiences***

As fundraisers, we are in the business of investing in relationships. Only when we build partnerships with donors and funders can we raise transformative gifts for our organizations and the Jewish community. The coronavirus spread came with the need for social distancing and a sudden stop to how we typically engage our partners and stakeholders. Almost overnight, donor cultivation events – parlor meetings, social gatherings, recognition celebrations, retreats, and international missions were suddenly off the table.

Within a few weeks of the Covid-19 outbreak, resource development colleagues at mid-sized and large national and international Jewish organizations started to embrace the online space to reach out to supporters and friends. Webinars and Zoom meetings soon reached the homes of donors and prospects. They helped supporters remain connected to the organizations they cared about most, and introduced them to other causes and nonprofits. Development professionals turned into masterful "Zoom-Hosts" and donors and funders into experienced "Zoomers".

Nonprofits have invited donors to online events that have overwhelmingly been following a traditional webinar format with speakers and chat Q&A. These web-based programs have served an important purpose: they have allowed organizations to keep in touch with groups of donors and funders, stay relevant, report on mission and Covid-responses, share their unique expertise and perspective, and inform and educate their donor, funder, and lay community. These events have helped effectively guide donors through the initial lockdown months and create a Covid-19 online normalcy in the least of normal times.

### ***Getting Past The Online Novelty***

Yet after nine months of Covid-19, the online space has lost its novelty and freshness – the Zoom hype has faded. It did not take long for "Zoom-fatigue" to emerge as a topic of conversation and a reminder of limitations found in the virtual space. Zoom fatigue sets in when donors and prospects “check-out”, feel unengaged and invisible during the online program – and yes, when they are overwhelmed with Zoom meetings and sometimes-impersonal webinar offerings.

A contributing factor to Zoom fatigue is that the Webinar platform lacks the video-on feature for participants. Even when using the Zoom Meeting platform, we have seen an increasing number of cameras turned off during virtual programs and Zoom meetings.

Other reasons why Zoom fatigue has turned into a real phenomenon is that most of the organizations to-date have assigned donors an online backseat. Besides showing up, logging in, adhering to a basic Zoom protocol, and occasionally using chat, organizations have rarely offered donors an active role during online programs. We have turned donors into "Zoom-Watchers" as they moved their donor events online. Organizations recreated a theatre movie and TV-show experience with little room for active engagement. And so, donors and funders are watching online programs rather than participating in them.

The question is: is this all? Can this be all there is for our development activities during Covid-19? The answer: Not at all.

The donor community has yet to experience the true potential of Zoom and the virtual space. There is a need and an opportunity for fundraisers and leadership in Jewish organizations to create new kinds of innovative online experiences for, and in partnership with, donors and community members. Virtual cultivation experiences that energize donors instead of putting them into the “Zoom-fatigue” mode.

### ***The Human Connection In Virtual Donor Cultivation Experiences***

It is essential to design new, interactive, and engaging virtual experiences for donors and funders because fundraising is all about the human connection; it is about helping people see possibilities. It is about inviting donors and funders to participate and co-create the virtual experience with your organization.

## **GENERATION ZOOM: OPPORTUNITIES FOR FUNDRAISING LEADERS**

It is crucial because donors and funders want an experience that meets their expectations. We must ask: what do our donors and funders want? What is important to them - in their lives and when attending an event?

We've learned that donors want and expect to ...

1. Have a good and meaningful time
2. Connect with peers
3. Engage and be part of a community
4. Feel good about affiliating with your cause and organization
5. Be valued and noticed
6. Bring meaning into their lives
7. Get excited about your organization's mission, learn and explore

A donor survey conducted by Cygnus Applied Research (Penelope Burke "Donor-Centered Fundraising") supports these seven expectations. Donors were asked what they considered the best about donor recognition events. The top best things about donor recognition events according to the study conducted by Penelope Burke:

88% meeting not-for-profit staff/volunteers

83% meeting other donors

81% held at a convenient time

78% pleasing or innovative venue/food

74% made donor feel valued

64% showed how gifts are being used

The findings highlight that personal encounters matter; donors are eager to meet peers; have a good time and feel valued. The seven donor expectations and the research findings inform how we, as fundraising professionals, plan and design in-person events. And they grant as an opportunity to bring these insights into the virtual environment.

### ***Hallmark of a virtual experience - it is donor-centered***

The hallmark of a virtual donor experience - and how it differs from traditional webinars and online programs - is its commitment to putting the donor into the center of the experience.

## ***GENERATION ZOOM: OPPORTUNITIES FOR FUNDRAISING LEADERS***

Virtual donor-centered cultivation experiences are interactive and engaging. They invite donors and funders to co-create the online experience. And they are personable. They draw participants directly into the experience in meaningful and thoughtful ways. The power of virtual experiences lies in the ability to bring people together. To connect donors with an organization and, especially, with their peers is a transformative experience.

Donors do not just observe and passively participate. Instead, they become the experience. The webcams lift the anonymity veil and create intimate encounters. This is contrary to typical webinar formats where only panelists and speakers are featured and stay invisible. Virtual donor cultivation events are donor-centered. Every donor is seen, important, and recognized. Those who choose not to attend will be missed and miss, in turn, an opportunity to be welcomed and acknowledged.

Virtual donor cultivation experiences invite donors and funders across generations to meaningfully engage with other participants, peers, and organizational leaders. Thoughtfully designed online facilitation techniques that take advantage of Zoom's features (i.e., breakout rooms, video features, view options, participant features, presenter tools) humanize the virtual environment, allow participants to build connections, dive into meaningful conversations - and to have fun.

And so, by putting the donors in the center of your online outreach strategy, online donor programs can turn into energizing, engaging, meaningful and memorable experiences for your donors and funders.

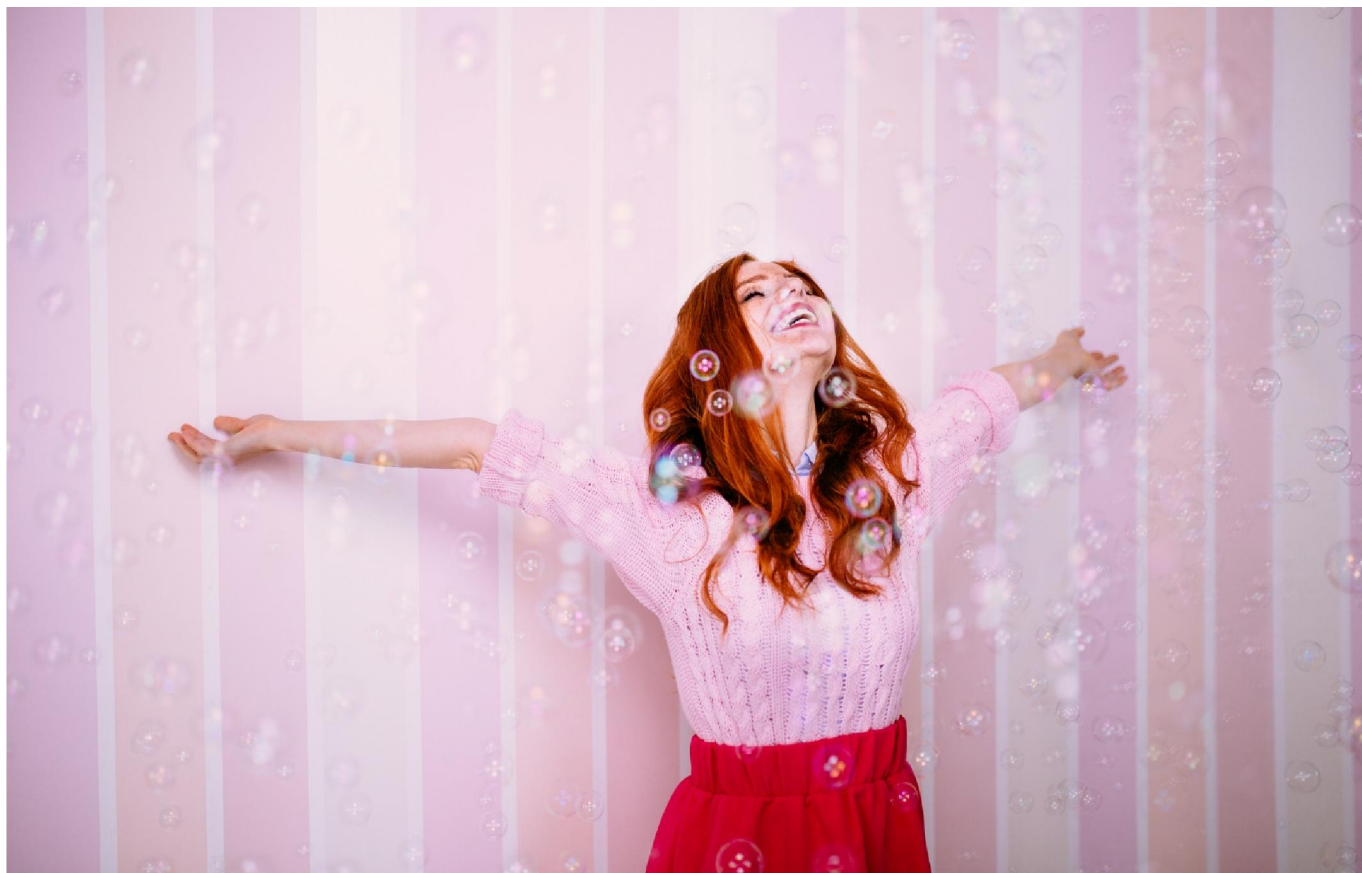
In Part 2 of “***Generation ZOOM and the opportunities for fundraising leaders***” you will learn about the unique opportunities for organizations to engage donors and funders in the virtual space and five steps to get started

## **GENERATION ZOOM: OPPORTUNITIES FOR FUNDRAISING LEADERS**

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### **PART 2**



***In part 2, fundraising professionals and organizational leaders are invited to explore innovative online cultivation opportunities for donors and funders.***

It is an invitation to shift from traditional online programs to interactive and engaging virtual donor cultivation experiences that put the donors into the center of the online experience. By embracing innovative ways of being with donors and funders in the virtual

## **GENERATION ZOOM: OPPORTUNITIES FOR FUNDRAISING LEADERS**

environment, we will expand the donor cultivation and engagement toolbox and the opportunities for your organization.

### ***Opportunity 1 - Create Donor Communities:***

Jewish life is all about community, about bringing people together. This core value must guide our work as fundraisers during Covid as well. Fundraisers need to build online communities with individuals and funders who help support change, innovation, and invest in Jewish life in North America, Israel, and the global Jewish community. A community of donors is essential because donors want to feel part of something larger than themselves. They want to belong. Virtual donor cultivation experiences that are engaging and interactive have a unique ability to create a community online. They get people to socialize and connect while social-distancing.

### ***Opportunity 2 - Build Donor Relationships & Partnerships:***

The core of our work as fundraisers is to cultivate relationships and mutual partnerships with donors and prospects. Individual outreach to donors remains critical and helps establish a meaningful bond between donors, fundraisers, and organizational leaders. As Penelope Burke, known for her extensive research on donor-centered fundraising, said: "Donors appreciate the opportunity to meet the people who run the organization - Board, administrative staff and those who make the programs and services possible". At the same time, donors want to meet their peers, get inspired and validated about their involvement through people they respect and want to be associated with. "Donors also look forward to meeting other donors who support the same cause, especially those they didn't know before", states Penelope Burke in "Donor-Centered Fundraising". Virtual donor cultivation experiences are a perfect vehicle to deepen and expand those relationships and create personal moments online.

### ***Opportunity 3 - Increase Donor Loyalty and Affiliation:***

Thanks to the nonprofit world's diversity and size, many donors and prospects are affiliated and involved with several causes and organizations. They are more devoted to some, less loyal to others in a fluid and ever-evolving way. Times of crisis and uncertainty often impact how donors feel about an organization. They inform future giving decisions as donors question: "Where was the organization during the Covid-19 pandemic?". It is the "loyalty test". Fundraisers and organizational leaders have a unique opportunity to increase donor affiliation by engaging donors through virtual cultivation experiences. And there is an urgency: organizations cannot wait and hold off until life returns to normal.

## **GENERATION ZOOM: OPPORTUNITIES FOR FUNDRAISING LEADERS**

### ***Opportunity 4 - Recognize & Value Donors:***

Directly tied to creating donor communities, building donor relationships and partnerships, and increasing donor loyalty and affiliation, is the heart of donor stewardship: donor recognition. It relates to how we, as fund recipients, acknowledge donations and thank donors. It is about valuing every donor and creating individual stewardship moments. In fact, it is pretty basic when it comes to the online space: acknowledge every donor's presence, put them into the center of the experience, see your donors and let them see others who have joined. Make it as personable as possible before, during, and after the virtual donor cultivation experience. As fundraisers and organizational leaders, we want donors to log off Zoom and say: "That was great, "I am so glad I joined; it was important to be there!" Virtual donor cultivation experiences humanize the online environment and make the experience unique and personable.

### ***Opportunity 5 - Expand Reach:***

The rapid move online during COVID-19 made our world smaller. We overcame geographic boundaries and time zones that usually define how we can engage and meet donors and funders. Jewish organizations quickly noticed that their online programs started to attract new prospects and donors, many of whom have not been participating in in-person events in the past. Online programs sparked the interest of busy and non-event loving donors. Among the many reasons are that webinars have been easy to attend, scheduled conveniently, have been short, and provided value with a focused and exciting program. If you can meet and mingle online with donors who are not your frequent cultivation event participants, this is an excellent opportunity for your organization. Take advantage of this moment in time and design virtual experiences that put those donors front and center. And keep in mind that the personal follow-up is critical here as well. Before the event, develop an immediate follow-up-strategy involving your key lay leaders and staff.

### ***Opportunity 6 - Engage Donors in Meaningful Conversations:***

"Deeper conversation builds trust, the oxygen of society, exactly what we're missing right now", said NY Time columnist David Brooks. These conversations are powerful in times of uncertainty and social distancing. People long for moments of genuine dialogue and personal encounters. Virtual experiences charter a new course. They help facilitate meaningful and respectful conversations and build community in the process. Virtual donor experiences, well-promoted and thoughtfully designed, are a perfect venue to convene talks relevant to your mission, help bring people together around issues, and allow for deep



## **GENERATION ZOOM: OPPORTUNITIES FOR FUNDRAISING LEADERS**

listening and reflection. They constitute a meaningful way to get to know your most supportive friends and invite them to co-initiate the future.

### ***Five Steps To Get Started***

Remember, virtual donor cultivation events are relatively easy to do. Follow a few steps to get started and launch your first online experience.

#### ***Step 1 - Say "Yes" to virtual donor cultivation experiences:***

Create a virtual donor cultivation event calendar for the first half of 2021; define your audiences and goals. Make it a fundraising priority for 2021. Then dive in, learn, plan, and pilot your first online event.

#### ***Step 2 - Assemble your pilot and cheerleader team:***

Every new program needs a team to plan and launch it. It requires a group of cheerleaders who will enjoy a first test drive and share the excitement with their friends and donors. Traditional in-person events receive a boost through committed lay leaders; the same is true for the online space.

#### ***Step 3 - Boost your online facilitation skills:***

Embrace Zoom to the fullest and boost your facilitation skills to bring engaging and meaningful techniques into the virtual space. Keep in mind, the virtual space comes with its own set of rules. See and learn what works and what does not. Tap into the wisdom of, and learnings from, the facilitation and innovation field, invest in your professional development, and get inspired along the way.

#### ***Step 4 - Explore and integrate online tools:***

A wealth of online tools and platforms can support your Zoom experience. Adapt education tools and game-based learning platforms for your virtual donor cultivation events. These include Kahoot or Gimkit or bring in presentation and polling sites such as Mentimeter.

#### ***Step 5 - Be curious, fail forward, and plan well:***

Enjoy the learning curve and the discovery of new ways to engage with your donors. Use your creativity and curiosity and go for it. Yes, fail forward but plan well and be very thoughtful about the kind of experience you would like to create.

## **GENERATION ZOOM: OPPORTUNITIES FOR FUNDRAISING LEADERS**

I conclude this two-part series here with my invitation to reimagine the virtual space. Never forget what brought you to the Jewish community and the people who make it thrive every day. Embrace the opportunities online to get to know, meet, and spend time with your most loyal supporters and friends. It is never easy to start something new, daunting at times to branch out, but certainly most exhilarating to see the magic that can unfold. Because: Donors and funders want to connect with you and your organization.

Have fun with it - enjoy the experience together.

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