

# Inside Philanthropy

## Envisioning the Future of Virtual Fundraising

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Fundraisers live by the metric system. No, I don't mean liters and centimeters and kelvins, unless we count our neighbors to the north. I mean performance metrics. Development folk love to talk about funnels and pipelines and to measure "moves" such as proposals sent, asks made and, of course, dollars raised. Everything can be quantified, plugged into spreadsheets, and used to determine fundraising activity and, we assume, effectiveness.

Given the axiomatic truth that fundraising is a people business and that personal relationships form the bedrock of giving (especially with individual major-gift fundraising), it's no surprise we exalt the [Almighty Visit](#). Face-to-face contact with donors and prospects has long been the sine qua non of fundraising and the most critical metric outside dollars raised—though I've known some development managers who actually prioritize visits over dollars because of the presumed long-term benefits of sustained, close relationships.

Enter COVID-19, which threatens to erode that bedrock. Gone, at least for now, are the days of lunches and golf outings and living room tête-à-têtes where friendships blossom quite naturally. Instead, we are forced to rely on conversations between two (or more) people staring into rectangles. We're still technically face-to-face, yet we're not breathing the same air. The now ubiquitous Zoom/Skype/Google Hangouts meetings seem like an adequate temporary substitute for getting together with friends and family, and perhaps even for interactions with colleagues. But can major gift fundraising survive in the age of virtual relationships?

## Good News and Bad News

Let's first consider the benefits. With no need for flights, car rentals, hotels and meals, it's certainly cheaper. Having legions of major gift officers flying around the country and beyond can get rather pricey. So organizational budgets are spared. Also, virtual meetings allow for greater scheduling flexibility. Imagine your donor in Denver is available when you happen to be on a fundraising excursion in Dallas; jumping on a Zoom call certainly is practical. Add more busy people to the mix—say, a university dean or president, or a board member—and finding schedule overlaps can prove impossible unless they're all safely tucked away in their own abodes equipped with their conversation rectangles. In addition, given the relative informality of virtual meetings, some donors might find the experience less stressful and feel more at ease.

Now the limitations: If your initial visit with a major gift prospect is virtual, you may miss some invaluable indicators of interest and capacity. An eager handshake or a warm embrace conveys a certain sentiment that a hearty “hello” online just cannot. If you're a student of [body language](#), you're more likely to read reactions accurately in person, especially if only the donor's face is visible on screen. What's more, visiting someone's home can reveal hints of wealth that can complement or reinforce what you might discover through public records and aggregators such as WealthEngine. With a virtual visit, you're confined to what's visible in the background.

Once engaged in conversation, you might wish to employ the “match and mirror” technique, the subtle art of moving, posturing and even talking like the other person in an attempt to build trust and rapport. (A more cynical term might be “mock and mimic.”) That's harder to accomplish fully via the online dialogue.

The technology itself might get in the way. Glitches happen, and you're apt to encounter Murphy's Law of Zoom, which suggests that at the precise moment of solicitation, buffering will occur. People are forever fussing with sound quality and struggling to hear every word during what can be choppy conversations. These

meetings are delicate and carefully planned. The medium cannot become an impediment or, worse, the focus of the discussion.

And let's return to the cadre of folks mentioned earlier—the fundraiser, the dean or president, and the volunteer, all participating in the solicitation visit. We'll add a spouse on the other end just for good measure. That's five people splayed out in a [Faberge Organics shampoo ad](#), all trying to navigate the unwieldy dynamics of a virtual conversation in which potentially millions of dollars are at stake. No pressure.

### **A Hybrid Model**

All that said, what's the likelihood of virtual philanthropy becoming the new norm? The jury's still deliberating, but I suspect we'll see the needle move a bit along the continuum if some early successes are realized. A dozen years ago I advocated for a [more virtual existence](#) among fundraisers, allowing them to work from home, travel for donor engagements, and visit the mother ship as needed. This represents the logical next step, though it changes things for donors, too.

When the dust settles on COVID-19, development offices will employ a hybrid version of fundraising, one certainly different from what we experienced way back in 2019. We'll have more phone conversations and Zoom-type meetings, for sure. Perhaps development shops will use the savings realized from reduced travel to invest in more [technology and training](#) to make virtual engagements as seamless and effective as possible.

Given the newfound sensitivity to physical space and the dawn of a new generation of germophobes wary of human contact and suspicious of the remnants of touch, we'll still see a preference among some people for social distancing. For development officers and donors alike, hugs and handshakes may become vestiges of a bygone era. Those who opt to get together in person likely will conform to current rules about personal space, maintaining a six-foot separation and exchanging air high fives like mimes in training.

Here's how I envision fundraising unfolding post-pandemic. Giving that is more transactional than relational will become increasingly common via virtual means. It's certainly true that all giving is relational to some degree; rarely do gifts occur where there's no existing or expected relationship. But fundraisers don't spend time wining and dining donors who give \$25 a year. At that bottom of the gift pyramid, primarily annual giving, online and mobile gifts will [continue to increase](#), as will outreach to such donors individually and collectively. Likewise, interactions with corporations and foundations may depend more on virtual contact, except where site visits are necessary during the solicitation or stewardship phase. Mid-level donors will continue to warrant personal attention, and fundraisers might be perfectly content reaching out to existing benefactors virtually to sustain habits of giving and to move people up the pyramid.

Residing atop the pyramid are the people who require special attention, and lots of it. Relationships with such people will be built and sustained based largely on donor predilections. Some might be fine with virtual engagements throughout the cultivation, solicitation and stewardship cycle. Some might want in-person interaction only. And some might want a mix of both. Let's just say it's in the fundraiser's and organization's best interests to be somewhat accommodating.

An exercise in trotting out stereotypes would have me note that your typical major gift donor is older and therefore more averse to technological advancements. Assuming that's somewhat true, fundraisers might for a time encounter a prevailing preference for traditional face-to-face meetings. Of course, the obverse suggests that subsequent generations, including digital natives, might welcome Second Life philanthropy complete with spiffy avatars for all participants.

## **Human Nature**

If I were a front-line fundraiser or a development manager coaching and mentoring others today, I'd still be wary of high-end donor relationships that exist completely online. I'm not convinced that transformational gifts can occur absent a visit to one's organization or campus and some form of personal interaction with leadership. Even if such an online-only relationship resulted in a sizable gift, I'd

wonder how much more would be forthcoming had a traditional approach been employed. I can, however, see an established lead donor who already knows your institution and its people being comfortable making that next big gift without the typical dog and pony show.

Earlier this year, teaching and learning across America became an online venture, and the [results are mixed](#). Some consider it an inferior process and product; others hail the flexibility and the benefits of asynchronous immersion. But while part of COVID-19's residue might be an increased appreciation for technology's role in connecting people, most seem eager to return to classrooms next fall.

And so it is with fundraising. Technology promises exciting new ways to do our jobs, especially if those ways save time and money, increase productivity and bolster results. That last part remains in question. Until development leaders see a positive correlation between the use of technology as a surrogate for personal interaction and a rise in giving, particularly at major-gift levels, steps in that direction will be tentative and incremental. The human race has been partial to physical interaction for quite some time, and we won't let one little pandemic upend the social order forever.

*Published June 30, 2020.*