Advancing Donor Relationships with Virtual Visits

BY STACY ROONEY
Every summer, I volunteer for Habitat for Humanity to help build a house. I need a tool belt for the various job tasks I will tackle throughout the construction project. If I’m volunteering in the early stages of construction, I will need to know how to lay cement for a basement/foundation of the house. When hoisting walls, I will need a team of people in the right position to help hold the walls up. When I’m working on roofing, I will need scaffolding or a ladder to allow me to get access to the roof. There are various tools I’ll likely need throughout different stages of the project: nails, hammer, saw, and so on.

Just like construction workers building a house, gift officers require a specific set of tools to build strong relationships with their donors. Different combinations of tools are required as a gift officer progresses through the identification, qualification, cultivation, solicitation, and stewardship cycles.

Since the coronavirus pandemic began in early 2020, gift officers were pushed into developing new tools to do the job. Like the proverb says, “necessity is the mother of invention.” While the coronavirus created the “necessity” for change, the “inventions” of using virtual platforms for relationship building will have a purpose long into the future.

This is a dynamic time for fundraisers, which means research will continue to evolve and change as we wade deeper into this new era. This paper seeks to assess what we’ve learned so far and offer suggestions for how to adapt to a rapidly changing fundraising environment.

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Deconstructing the Basic Fundraising Cycle and Tools

Before we can build the virtual fundraising process, we need to deconstruct what we know about the fundraising process in a non-virtual world. We all know the basic fundraising process of identification, qualification, cultivation, solicitation, and stewardship but let’s pause to ensure we all know the goals of each step.

<table>
<thead>
<tr>
<th>Step in the Fundraising Cycle</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identification</td>
<td>Identify the best prospective donors from a pool of constituents.</td>
</tr>
<tr>
<td>Qualification</td>
<td>Verify the research from identification stage with interactive research to learn the prospect’s philanthropic motivation, inclination, and preferences.</td>
</tr>
<tr>
<td>Cultivation</td>
<td>Find ways to highlight the importance and impact of the organizational mission to the prospect. Reflects back information to prospect about what the officer knows of prospect’s philanthropic motivation, inclination, and preferences.</td>
</tr>
<tr>
<td>Solicitation</td>
<td>The officer lays out/builds the final case for support to the prospect with the ultimate alignment of the information gleaned in previous three stages to ask the prospect for a specific amount to make a specific impact on the organization’s mission.</td>
</tr>
<tr>
<td>Stewardship</td>
<td>The organization continues to show gratitude to the donor for the impact of the donor’s philanthropic gift to the organization.</td>
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Now we must consider what are the tools that we have commonly used to accomplish each goal:

- **Contacts**
- **Visits**
- **Events**
- **Proposals**

**Contacts** are most often outreach such as emails, letters, phone calls or events that extend information to the prospect to gain their interest in the organization’s mission. Contacts are often used as a tool to try to secure a visit with a prospect. A **visit** is a more meaningful exchange. An officer might invite the prospect to **events** along the way to deepen relationship and prospects understanding of the mission of the organization.

When the officer feels the prospect and officer/organizational goals are in alignment, the officer will solicit the prospect for the gift. The target ask then becomes an actual ask/[submitted proposal](#). At that point, the officer can evaluate an expected amount and an expected date of when the prospective donor might respond. When the donor responds in the affirmative (some institutions require written commitments and/or the actual gift while others accept a verbal commitment), it is a **granted proposal**.
Of the four most common tools, visits and events are the two that vary most in a virtual environment and each have different pros and cons. We are going to focus on the rise of the virtual visit in this paper.
The Rise of the Virtual Visit

Of all the tools in the gift officer’s tool belt, visits are arguably the most vital and can be used in the qualification, cultivation, solicitation, and stewardship stages. Through the course of the cycle, the goal of visits is for the officer to:

1. Learn about the prospective donors’ areas of passion and philanthropic goals.
2. Share specific and meaningful information related to the organization’s vision for the future and philanthropic needs.
3. Make an ask of the donor that matches philanthropic goals of the donor to the philanthropic needs of the organization.

TRACKING THE DATA

Before comparing the experience and effectiveness of the virtual visit is even possible, it is important to consider how to track the data. Each institution needs to have a clear definition of what constitutes a visit regardless of the format of that visit (virtual or in person). Most commonly a visit is a substantial conversation that moves the philanthropic relationship forward.

Organizations should track in person visits and virtual visits separately to allow for better data analysis in the future.

COMPARING THE EXPERIENCES

There are pros and cons to both kinds of visits. The most effective officers will know how to use which tool at the right moment in building the relationship.

<table>
<thead>
<tr>
<th>In-person/Face-to-face</th>
<th>PROS</th>
<th>CONS</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Officer can read clues in the prospect’s body language</td>
<td>Additional challenge of planning logistics to get to shared location</td>
</tr>
<tr>
<td></td>
<td>Shared environment with shared experience</td>
<td>Additional travel time to get to shared location for both parties</td>
</tr>
<tr>
<td></td>
<td>Potential for officer to bring swag/gifts/share physical materials</td>
<td>Additional cost of travel</td>
</tr>
<tr>
<td></td>
<td>Opportunity to provide or share food/drink and the experience of “breaking bread” together</td>
<td></td>
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<table>
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<tr>
<th>Virtual Platforms</th>
<th>PROS</th>
<th>CONS</th>
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<tr>
<td></td>
<td>Freedom of physical location eliminates need for travel and opens prospect pool to all geographic locations</td>
<td>Potential for tech issues or platform confusion</td>
</tr>
<tr>
<td></td>
<td>No travel time for either party</td>
<td>Potential distraction for both parties such as home life, emails, etc.</td>
</tr>
<tr>
<td></td>
<td>In comparison to busy coffee shops or restaurants, there is potential for more focus and personal conversation</td>
<td>“Zoom fatigue”</td>
</tr>
<tr>
<td></td>
<td>In comparison to public meeting, this might allow officer to see in the home environment of prospect sooner for additional insights about individual’s life</td>
<td></td>
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For the officer to weigh the pros and cons, it is helpful to think about the depth of the prospective donor’s relationship to the organization.

**New Relationships: Prospective donors who are visited for the first time from anyone at the organization.**

The commitment level of a virtual visit is lower than meeting in person. There are fewer logistics for the prospective donor to navigate which will likely increase the quantity of first-time visits officers will be able to secure. While early data since the beginning of the pandemic is still emerging, there was a 25% increase in the number of contacts between January 1, 2020 – July 31, 2020 compared to the two previous years of that same 6-month window of time.

It stands to reason that the quantity of contacts and even virtual visits are higher as there is an ease of logistics and no travel time involved. Instead of sitting in the car for 30 minutes to travel to one in-person visit, an officer could send three emails. Instead of the hours it takes to travel by air, an officer could have four virtual visits lined up. In the next section on Comparing the Effectiveness, we will review the quality of virtual visits.

Another advantage of a prospect virtually meeting with an officer early in the relationship is that the prospect is potentially sharing more about his/her life earlier in the relationship. The officer might hear children or pets in the background to get a sense of the prospect’s whole life. Earlier in the relationship, the officer might get to see parts of the prospect’s home or office which will give the officer clues about the prospect’s life.

**Developing Relationships: Prospects who have been visited one to four times.**

This stage of relationship building seems to be the most challenging to translate into virtual environments as traditionally it depends on deepening the relationship through shared experiences. It can be difficult to escalate a relationship without the traditional tools such as tours or events as an incentive for the prospect to want to meet with the officer again. Officers should be creative in how they share authentic experiences that highlight the impact of the organization’s mission in a personal way. As the officer learns more about the prospect, the officer can curate virtual experiences. Officers should lean into the advantages of virtual experiences such as the easier logistics. With virtual visits, prospects that lived geographically far away are equally valuable to those that live geographically near. For prospects that might have physical or schedule limitations that make transportation challenging, they can fully participate in virtual events from their home.

It is important in both developing and existing relationships to consider how the officer can provide value to the prospect’s relationship to the organization.

**Existing Relationships: Prospects who were visited five or more times prior to the start of virtual visits.**

The transition from in-person to virtual visits tends to be easiest when dealing with prospects who already have an existing relationship with you. If you have a tried and true connection between an officer/organization and a donor, the specific channel of connection is fluid.
The biggest question fundraisers face with virtual visits is effectiveness.

**According to data from Blackbaud Fundraiser Performance Management™, in-person visits and virtual visits perform similarly.**

To make this determination, data analysts first compared the percentage of donors that gave a gift of any amount after either/or a traditional face-to-face visit or a virtual visit. The analysts also used the stages of the relationship to specifically compare those in new, developing, or existing relationships.

While traditional visits slightly outperform the virtual visit in percent of donors that donate, it is of note that the performance is comparable.

When analysts looked at the average gift size for those that did give a gift, the virtual visit slightly outperforms the traditional visit in a new and developing relationship. Some of the existing relationships still benefited from in-person visits for bigger gift amounts.

### % DONORS THAT GAVE

<table>
<thead>
<tr>
<th></th>
<th>NEW</th>
<th>DEVELOPING</th>
<th>EXISTING</th>
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<tbody>
<tr>
<td>1st</td>
<td>10%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>2nd</td>
<td>13%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>3rd</td>
<td>12%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>4th</td>
<td>13%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>5th</td>
<td>13%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>&gt; than 5 visits</td>
<td>17%</td>
<td></td>
<td>19%</td>
</tr>
</tbody>
</table>

**Data Needed to Measure Virtual Visit Effectiveness:**
- % of donors that gave one month after a visit
- Average gift of those that gave one month after a visit
While we continue to sharpen the tools of both traditional visits and virtual visits, this data may evolve. For now, the performance of both types of visits seems similarly effective.
Data to Track in the Future: Time to Gift

Time to gift takes into consideration the number of contacts, visits, and submitted proposals required before a major gift is made. This information provides a tool to analyze your organization’s pipeline and make accurate predictions on when a gift may be granted.

There is much deeper research from traditional visits since many organizations are just now starting to use virtual visits more intentionally. Looking at the cadence of research from traditional visits, we see a five year average of:

- 93.8 contacts before a granted proposal
- 13.5 visits before a granted proposal
- 1.6 submitted proposal before a granted proposal

As organizations start to differentiate virtual visits from traditional face-to-face visits, the time-to-gift averages on virtual visits will emerge (though it may take years). In order for these comparisons to be made, organizations must enter data segmented by in-person and virtual visits.

As the behaviors evolve, ongoing research is needed to assess the pace and overall health of the major gift pipeline by tracking the number of new donors that reach new giving milestones/gift bands such as $10,000.
Conclusion

Early data suggests that virtual visits are as effective as traditional face-to-face visits as a tool in building relationships. It is particularly true in new relationships, but may call for officer creativity in ways to elevate a developing relationship.

While born more out of necessity, savvy officers will continue to use virtual visits as an important tool even after travel and face-to-face visits are an option again. As discussed, there are many benefits to virtual visits that increase effectiveness of officers, while also keeping the focus on the basic fundraising process of identification, qualification, cultivation, solicitation, and stewardship.

Learn how Blackbaud Fundraiser Performance Management can help your team make the most of gift officer visits.

Learn more
About the Author

STACY ROONEY

Stacy Rooney is a Principal Business Consultant at Blackbaud, primarily supporting the company’s Fundraiser Performance Management community. In her role, Stacy shares data-driven insights to inform the best strategic direction and change management best practices to actualize needed changes.

Prior to joining the organization six years ago, Stacy worked in annual giving/direct marketing for a decade. In addition to Stacy’s professional experience, Stacy is trained in conflict resolution and volunteers and raises funds for several non-profit organizations. When not at work or volunteering, Stacy enjoys running and playing ping pong.