



21 Remote, Virtual and Digital Engagement Opportunities©

A Resource of The Osborne Group, Inc.

Engagement is key to advancing a donor relationship towards an inspired, joyful, and generous, “yes.” Your leadership and major donors want to make a difference. They want to be wanted/needed for more than just money. And they want assurance that whatever you are asking of them, they are capable of, and interested in, accomplishing.

Engagement is two-way (interactive), and contains a thinking, feeling and doing component. It is both meaningful to the donor and productive for your organization or institution. In other words, it can’t be fake busy work like serving on a committee that you don’t need.

We use engagement opportunities as fodder for our donor strategies. They are not strategic until you make them so by including them in a well thought out donor engagement plan.

During this crisis, brainstorm with your team a rich set of virtual and remote engagement opportunities that meet the criteria stipulated above. Below is a list to help you get started. We’ve included a few communication suggestions as well.

1. **A virtual visit** via phone, Facetime, Skype, Zoom or a similar platform. Make sure it has a clear objective and is part of a strategy. Think about who you might include. Ask lots of strategic questions and listen! End with a “yes” to a next step.
2. **Vision/parlor meeting.** Replicate this proven practice online. Your goal is to engage the participants in a discussion about the “issue” your organization is trying to solve. You are inviting guests for a conversation, not a presentation. Recruit your host first (great engagement for the host) and plan the meeting with him or her. Invite guests letting them know you are seeking their ideas and reactions. Be sure to make introductions at the beginning. Find out how everyone is doing. End with a commitment to follow up and then brainstorm next steps with your host.
3. **Guest blog, video blog or Medium post.** To make this engaging, you will need to have a virtual planning meeting first. Ask lots of questions. Be clear about what you are trying to accomplish with the blog. Perhaps send the post to key donors and potential donors and ask for their impressions. Recruit some of them for the next post.
4. **Invite to serve on a virtual panel** discussing an issue important to your organization. This follows the same principles as the parlor meeting but allows you to recruit a small group of donor panelists with a panel “host.” Be sure there is a way for the audience to ask

questions and share ideas. You can include your staff or staff from allied organizations on the panel, as well. Invite other donors to attend the panel.

5. **Webinar on a topic of interest.** This is a great way to engage the expertise of a key donor or donors, or of expert staff members. Build in several Q and A times as well as “polling questions” to keep the webinar interactive.
6. **Virtual one-on-one stewardship meeting w/ slides or other materials.** Delivering the impact of giving to a donor is a powerful way to remind the donors of the importance of their giving, the difference they made. Consider involving a board member or a program person (faculty, curator, etc.). Ask lots of questions. And, of course, listen.
7. **Virtually mentor a client.** Do you have seniors looking for work or juniors looking for a college? Do you have clients who need help with budgeting during this crisis? Recruiting mentors for one-on-one meetings, or with a group of clients, helps the donor use her expertise – one of the most effective ways to engage.
8. **Virtual Town Hall or Forum.** This is a great way to get the CEO’s message out and let your donor base know what is going on at your organization. To make it interactive, besides opportunities for Q & A, make follow-up calls to ask and answer questions.
9. **Host your board meeting via a Zoom-like platform and invite key donors to take part or listen in.** This kind of radical transparency can be very powerful. Make sure it is one of your more interactive meetings where you will be grappling with important topics (not a reporting meeting). Share board materials with the key donors. Follow-up.
10. **Invite key donors and volunteers to make a stewardship video or solicitation video.** Make sure you have a plan. Seek input from the donor. The video is a testimony about why they give and their (the donor’s and the viewers’) impact on your clients and our society.
11. **Host a virtual gala or event.** Form a planning committee. Identify top donors and sponsors. Solicit their opinions as part of the planning. Solicit committee and top donors three to six months before the event. Recruit volunteers who will personally reach out and share their enthusiasm. Seek advice from your corporate sponsors as well. Ask your corporate sponsors if they will sponsor any videos you create in exchange for their logo on the video.
12. **Online petition on something related to your mission, vision and values.** Ask for action and have a way to let you know the action was taken. Follow-up.
13. **Online donor satisfaction survey.** This is always great engagement for your leadership donors. How are they feeling about their giving? What are their perceptions of your organization? Be sure to capture names so you can follow-up. The survey questions can also be asked as part of a one-on-one meeting to turn this into a powerful engagement. Follow up.
14. **Invite to be on a podcast.** This can be mission, vision or values focused or can be philanthropy focused or both. Interview the donor. Share the questions in advance and discuss strategy.

15. **Set up a Discord or Slack** to discuss issues relevant to your constituents. This requires monitoring but can also create powerful ongoing communications with your top donors. Pose questions and make notes of the answers.
16. **Do a group video call asking for advice** from trusted volunteers and donors. This works best if it's a smaller group of donors letting you create a feeling that the donors are "insiders." Be sure to ask for advice around areas where advice will be useful to you.
17. **Ask to collaborate on a case for support, marketing collateral**, etc. via google docs. Be sure to discuss with your donors in advance what you are looking for.
18. **Fundraising for a crowdfunding campaign**. Ask your donor to host a crowdfunding campaign or to be one of several captains. Be sure to support them with the needed marketing collateral, video, etc.
19. **Email a "reading list" to your donors**. You have lots of materials, articles, etc. but you wonder if anyone is reading them. Now is the time to put them in a digest of links (or the files themselves) and email it to your donors. Seek reactions from your more important donors.
20. **Screen a movie or host a book club**. Is there a movie or book that does a good job of addressing your cause? Provide a way for people to watch the movie or read the book and then host a virtual discussion.
21. **Don't forget snail mail!** Hand-written notes still work.

What has your organization come up with? Let us know! mail@theosbornegroup.com

If you would like to learn more about major gift fundraising or would benefit from assistance as you develop your engagement opportunities and donor plans, contact us at mail@theosbornegroup.com or (914) 428-7777. We also specialize in all aspects of institutional advancement, fundraising, campaign planning and implementation, board development and engagement and nonprofit management.

Visit us at www.theosbornegroup.com. Connect with us on LinkedIn: Karen Osborne, Robert Osborne, Jr., and Laurel McCombs. Follow us on Twitter @bobosborne17, @kareneosborne