

Top 12 Things to Discuss with Donors During the COVID-19 Social Distancing Protocol

The following conversation topics could be covered over multiple calls with planned giving donors and prospects. They are in no particular order of importance or preference. The COVID-19 pandemic is an opportune time to prove what we often say: fund raising is about relationships.

1. What are you doing to cope with isolation? Is it/Are they helping?
2. Are you getting the necessary food and medication(s)?
3. If the answer to the above is no, and you do not have any underlying medical conditions, then ask if you could get food or medication for your donors.
4. Are you using technology such as FaceTime, Zoom or Skype? I would welcome the opportunity to see you the next time we talk.
5. Highlight your organization's mission and what it is doing to combat COVID-19 (research), test/treat (clinic/hospital) those with the virus, or to help meet other needs of those impacted by this pandemic.
6. For restricted gift donors, stress the impact of their gift on their interest area – especially if it is helping combat or treat COVID-19.
7. More generally, remind donors of your organization's mission and the impact their gifts have on those served.
8. For CGA annuitants, remind them that their annuity payments will not be affected by market volatility.
9. For donors aged 70 and older, ask if they are familiar with the SECURE Act and the new rules regarding IRAs, Qualified Charitable Distributions, and the demise of the stretch IRA – particularly if you know the donor has a large IRA or they express an interest in a current gift. (A summary of the SECURE Act is available at www.heatonsmithgroup.com or AHP's resource center at ***field.***)
10. Many donors update their estate plans during times of uncertainty. Offer your expertise or any planning resources that would help donors make better decisions for estate planning updates.
11. Is there anything that I could do to help you during this time of social distancing?
12. May I call you every week or every two weeks for a check-in?