

Virtual Reality in 2023

Building Relationships & Soliciting Planned Gifts in a Hybrid Environment



Beth Delaney, MSW, MS

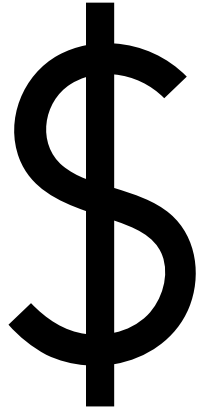
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Best Practices



Fundraising



Business



Education

Learning Objectives

Academic research on Positive Organizational Scholarship & High Quality Connections

Using virtual platforms to reach a wider prospect base + donors at a distance

Create meaningful conversations about asset selection and planned gift options

Respect donors' preferences regarding in person and virtual visits

Steward donors to connect them in significant ways to your nonprofit

Share your best practices

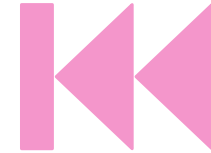
Planned Giving = Relationships



Donors share their goals, aspirations, private financial information



Fundraisers: listen, build trust, share expertise



Before 2020:



Donor Interaction since 2020

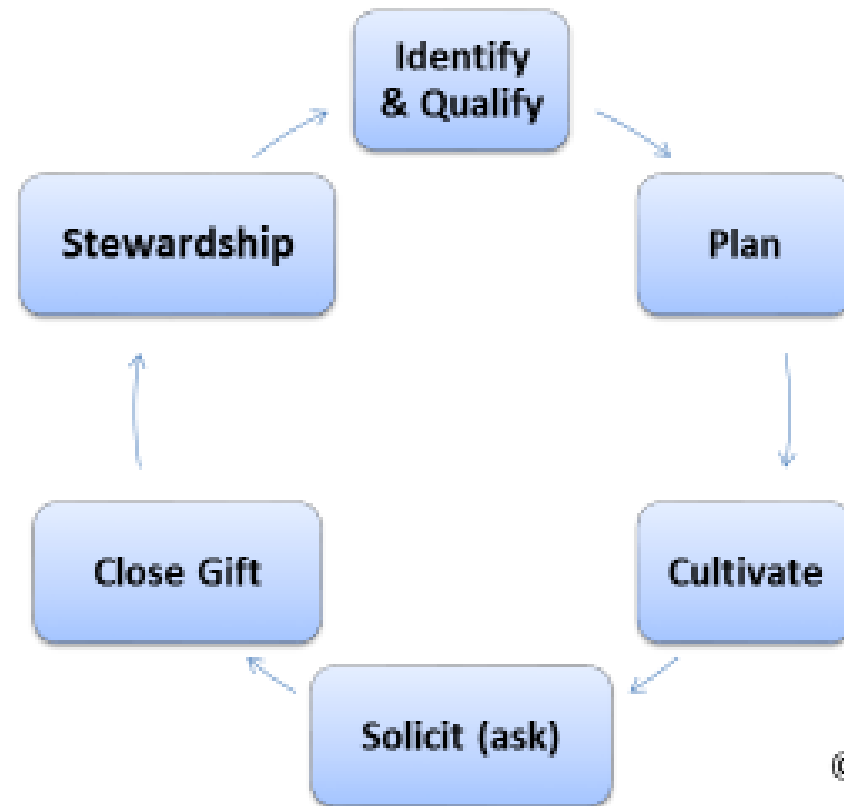


2023 = Virtual Reality

**Share best practices to
Build Relationships &
Solicit Planned Gifts
in a Hybrid
Environment**



Prospect Management Cycle



© Paul Edwards



teams

letter

phone

text

birthday



vimeo

event

email

thankview

zoom

holiday

notecard

meeting



visit

High Quality Connections

- ▶ **build trust,**
 - ▶ **increase socialization,**
 - ▶ **increase task enabling, &**
 - ▶ **create respectful engagement**
-
- ▶ **mutual positive regard, trust, & active engagement on both sides**
 - ▶ **overcome old patterns, rebuild an atmosphere of trust, identify the donor's intrinsic motivations, forge better interpersonal & group dynamics**

High Quality Connections

- ▶ **Deeper connections, better conversation**
 - ▶ **asset selection,**
 - ▶ **cash gift – QCD – IRA beneficiary designation**
 - ▶ **gift structure,**
 - ▶ **repeat donors,**
 - ▶ **increased & blended gifts**

Applications & experiences in planned giving

- **In person visits**
 - **When a donor (or fundraiser) is cautious**
- **Virtual connections**
 - **Asking deep questions**
- **Hybrid**
- **In person then virtual follow up**
- **Meaningful stewardship**

Maximize High Quality Connections

- ▶ **Train donors, staff, board members & volunteers as “evangelists” to expand the organization’s network & influence by spreading its mission, vision, & values**
- ▶ **Identify & invest in the donors, staff, board & volunteers who are advocates of your mission**

Best Practices in Business

A business journal from the Wharton
School of the University of Pennsylvania

KNOWLEDGE AT WHARTON

TOPICS ▾

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Creating Authentic Connections in Virtual Teams

July 18, 2023 • 10 min read

Working with Matriarca, an Argentinian sustainable goods distributor, scientists from the Wharton Neuroscience Initiative leveraged an exercise known as "Fast Friends" to improve online collaboration within the organization. In this article, they explain how any group can adopt the same technique.

● LEADERSHIP ● MANAGEMENT



“Fast Friends” Exercise or “36 questions to fall in love.”

- ▶ **scientifically validated exercise for enhancing online collaboration**
- ▶ **results in improved relationships, trust, and cohesion**



Though only a pilot study, the implications are clear. Implementing evidence-based connection exercises in a virtual context can help increase workplace camaraderie and trust, especially for a diverse workforce.

[https://https://knowledge.wharton.upenn.edu/article/creating-authentic-connections-in-virtual-teams/](https://knowledge.wharton.upenn.edu/article/creating-authentic-connections-in-virtual-teams/)

Becoming Fast Friends in Your Virtual Team

- ▶ **Preparation**-Curate or adapt the list of questions and compile them in a document.
- ▶ **Explanation of purpose & establishing safety** – The purpose of the exercise is to help create and sustain more meaningful relationships, which is beneficial to overall health, team effectiveness, and business success. Participants work in pairs and get 15 minutes for each set (10 minutes for an abbreviated version). Participation is voluntary
- ▶ **Pairing** - Randomly pair up participants.
- ▶ **Debriefing and follow-up** - After the exercise, bring everyone back into the main room. Encourage participants to share their experiences. You may also want to check in with individuals or teams a while after the exercise via email to see how Fast Friends impacted team cohesion, well-being, trust, and work outcomes.



MAGAZINE SPRING 2011 / RESEARCH FEATURE

The Power of *Reconnection* — How Dormant Ties Can Surprise You

The Web has made it easier than ever to reconnect with long-lost professional colleagues. Does it pay to do so? New research says yes — and suggests that every smart manager will try.

Daniel Z. Levin, Jorge Walter and J. Keith Murnighan •

Reconnecting dormant relationships can be extremely useful

[The Power of Reconnection — How Dormant Ties Can Surprise You \(mit.edu\)](#)

Teach Remotely

[Get Started](#) [Best Practices](#) [Video and Audio](#) [Learn from Colleagues](#) [Technology and Tools](#) [Get Help](#)

Pedagogical Best Practices: Residential, Blended, and Online

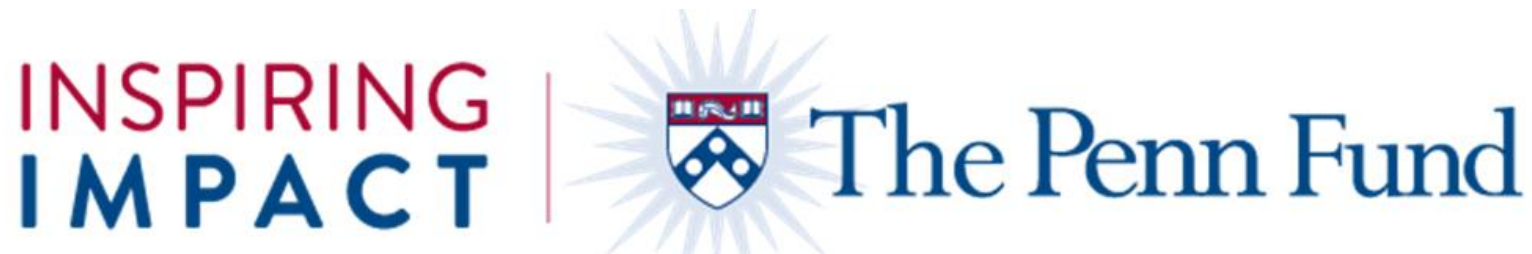
**Principles & tips to help teach in person, fully online,
or a little bit of both.**

**Pedagogical Best Practices: Residential, Blended, and Online |
Teach Remotely (harvard.edu)**

Guiding Principles

- **Increase learner engagement by identifying learners' questions about the material**
- **Using polls and other interactive technologies to get a sense of students' experience, comprehension, and reactions ("reading the room")**
- **Inviting specific students' answers (cold calling)**
- **Opening the floor to general discussion of particular questions**
- **Creating opportunities for synchronous or asynchronous collaboration via tools like Google Docs, etc.**

Smart Ways to Give



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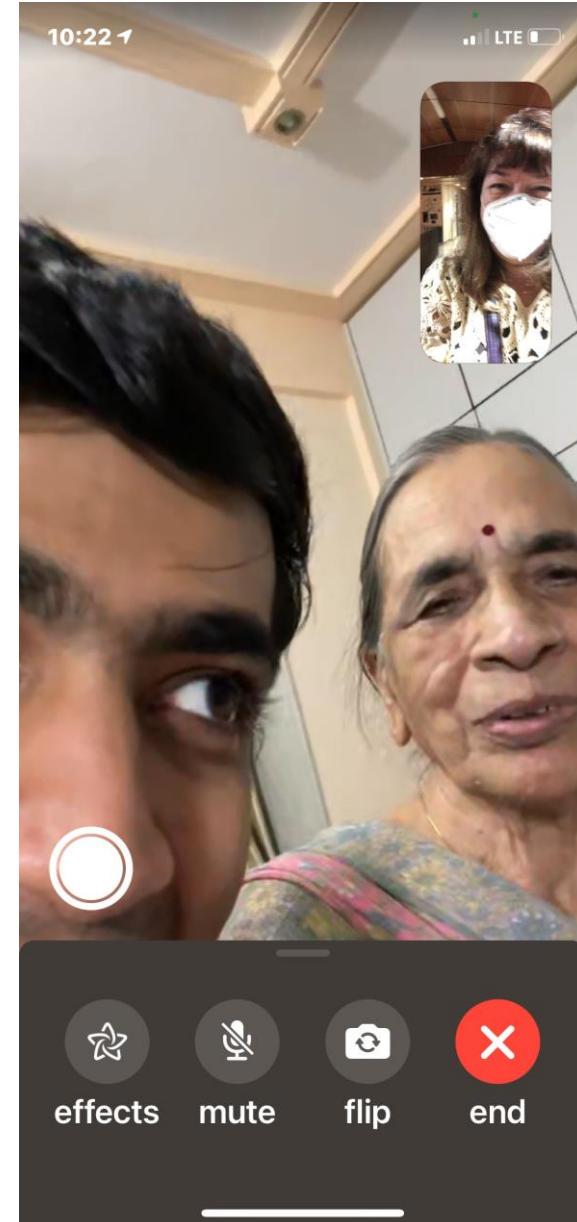
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Active listening during virtual meetings & visits

- ▶ **Speak slowly & pause for questions**
- ▶ **Zoom fatigue is real – take stretch breaks**
- ▶ **Ask all participants to start on mute (or set up in advance)**
- ▶ **Participants keep their video ON**
- ▶ **Ask checking-in questions**
- ▶ **Use chat for larger groups or direct message if question is private**
- ▶ **Use nonprofit background**
- ▶ **How do you like to receive information?**



Nonprofit's Website



Legal name of organization & Tax ID letter



Types of planned gift (easily understandable language)



Giving link



Interactive tools



Videos & donor profiles



Tax updates



Gift calculator (CGA)



Sample QCD letter



teams

letter



vimeo

visit

event

email

thankview

zoom

holiday

notecard

phone

text

birthday

meeting



Best Practices & Questions

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