

“How a Pandemic Magnified the ‘Why’ in Planned Giving”

The natural experiment forced on the world by COVID-19 has pushed everyone to pivot and think differently about a multitude of things impacting their lives. The planned giving world was no exception! Whether it was the shift from a reflective to a reactive conversation, rethinking how we build connections and steward our donors or the evolving shifts in generations open to planned giving and the mediums they chose to engage with, we’ve all been forced to rethink how we market to donors. Through Stelter’s experience working with nonprofits from all subsectors, as well as data we’ve received from fundraisers like you, this presentation aims to provide clarity and ideas for tackling the ‘next normal’ of planned giving.

In this presentation you will learn:

- The unique challenges and opportunities facing nonprofit subsectors and how the pandemic accelerated and/or brought attention to the need for support
- Donor expectations and interactions by generation and how understanding 7 critical donor mindsets can help you navigate your engagement with them
- The role of authenticity, technology and managing change as we steward and build connections with donors going forward