**Engagement Opportunities**

*A Resource of The Osborne Group, Inc.*

**Research by Bank of America and the Indiana University demonstrates that:**

1. Engagement increases giving among high net worth individuals. Non engagement donors gave an average of $34,000 a year while engaged donors gave $124,000 a year
2. When the donor engagement included using the donor’s professional expertise, giving averaged $158,000 a year.
3. When the donors involved their children in their philanthropy, giving jumped to $244,000.

For engagement opportunities to work, and actually increase your donor’s motivation to give maximum gifts, introduce to others, be a champion and advocate on your behalf, the engagement has to be ***personally satisfying to the donor, meaningful and productive for the organization***. Busy work saps the productivity of the office and becomes apparent to the donor. Work that is needed but does not feel meaningful or productive, turns off volunteers. You need the magic of all three components.

**What you can do to use this important information?**

1. Uncover through strategic questioning and listening, **ALL** if your donor’s areas of expertise. Don’t just look at what he or she is currently doing for a living. In today’s world, unlike the World War Two generation that tended to work for one firm throughout their career, Boomers and members of Generation X often have had eclectic paths with jobs in a variety of fields. Find out all they have to offer professionally as well as personally.
2. Uncover how he or she enjoys being involved. Does she like projects with clear start and end dates? Is he a joiner who likes on-going committee work? Does he like to entertain? Is she a strategic thinker who likes problem solving?
3. Ask questions first!
4. Brainstorm a list of needs you have – tasks that need doing, problems to solve as well as direct fundraising activities. Include, in that list ways that you could tap into professional expertise as well as engage children in philanthropy.

**Here are some ideas to get you started**

**Stewardship**

1. Accountability visits to institutional funders that includes sharing future directions and uncovering information about the funders future plans
2. Stewardship phone calls to donors giving similar or lesser amounts that include uncover information and building relationships
3. Hold an **annual Leadership Giving reception** at your CEO’s home or the home of a board member as a stewardship opportunity, continuing to build on the event year after year so that donors view it as an opportunity each year to catch up and reconnect.
4. Tapping marketing expertise to help review and improve stewardship materials
5. Tapping marketing expertise and strategic thinking by doing a website review and making suggestions from a donor’s point of view. Does the website accomplish our goals? Does it answer the questions donors might have? What are donors like you looking for?

**Families**

1. Philanthropy Forum for Families to discuss how families can help children and grandchildren embrace philanthropy, develop their own philosophy or help other children and families in need.
2. Appreciating Differences Day – an opportunity for donors and their families to experience what it feels like to have a physical challenge, discuss differences, write about, draw pictures about, find commonalities
3. Seek advice about the best ways to engage the children of donors
4. Family Giving Back Day – inviting families of donors to a day of providing service to clients and their families – everything from reviewing resumes, job interview techniques, repairing and painting toys, organic gardening, healthy cooking, learning about social networking, and so forth
5. Establish volunteer opportunities where corporate partner staff, service club members, and other engaged groups and their families have the opportunity to **work on-site at a center or camp**. Individuals can help with “spring cleaning” or other light projects that need to be done. Later in the year, share with the individuals who volunteered pictures of clients enjoying the facilities that they helped to improve.
6. Invite major gift donors to an event being held in a program area where their **gift made an impact**. Instead of just inviting the donor, invite his or her family to the event and place them in volunteer roles during the event, through which they will be able to have meaningful interactions with clients.

**Issues, Advocacy, and Vision Gatherings**

1. Host, help plan events on issues facing the community like aging population, health care, teen-age mothers, access for people with disabilities, transportation, returning military with injuries, autism and so forth
2. For long-term engagement for donors of high capacity, invite to **serve on committees** such as on a board committee as a non board member, lobbying committees, and fundraising committees
3. Host vision meetings about ES vision for the future to seek reactions and advice about sharing it with others

**Specific Areas of Professional Expertise**

1. Specific advise on legal, finance, marketing, board development, positioning in the community, architecture, policy, lobbying and so forth
2. Serving on a training panel for local or national staff and/or volunteers about what donors are looking for, financial planners and philanthropy, estate planning and philanthropy
3. Provide professional advice to client and client families
4. Develop opportunities for engaged donors and volunteers to **mentor** residents, clients and families.

**Specific Fund Raising**

1. Tapping into your social capital – introducing you to people of influence and affluence who may help you with advocacy, meeting philanthropic others, board building, hosting events
2. Table hosts – not just sponsors. Ask donors to host the table with specific assignments to meet, deliver messages and ask questions of specific donors
3. Lead a fundraising committee – chair the meetings, help set the charge of the committee, help set the agendas, follow up with committee members
4. Engage potential donors through any of the above strategies as well as the ideas on the complete list of engagement opportunities
5. Advice on how to better engage families in fundraising opportunities
6. Peer solicitation with you
7. Advice on legacy programs, complicated planned gifts
8. At gala dinners, encourage **table sponsors to invite individuals** who are not familiar with Easter Seals. After the event, have development staff follow up and continue to cultivate them for greater engagement and future gifts (and, of course, attendance at the next big event!).
9. Establish a **Lunch with the CEO** program, taking place every other month. Have board members invite individuals who they feel might be interested in the mission. Keep the lunches small – with your CEO, CDO and the board members – and give your CEO the floor to speak and engage the guests in a dialogue; give a facility tour.
10. Within a live or silent auction, have one of the auction items be a **dinner at the CEO’s home or a board member’s home with the CEO**. The highest bidder will receive a dinner for 10 cooked by the CEO and other senior staff members (and maybe with the help of a local restaurant!).