

# Rethink the discovery process

Strategies to unlock support from  
your donors and prospects

FALL 2020



Art Institute of Chicago

# GG+A

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Grenzebach Glier and Associates is the first-choice partner for nonprofits worldwide that are seeking substantial and sustainable growth in building outreach and engagement, and in the philanthropic support of their missions. We believe in the transformational power of philanthropy to improve lives and strengthen civil society. Our work is focused on marshalling the resources and building the structures and talent that sustain high-performing fundraising programs.

**Our mission is advancing yours.**

Dear Colleagues,

*“Early this spring, seemingly overnight, the time-tested habits of Advancement evaporated.”*

These eloquent words from my colleagues Melinda Church and Pete Lasher encompass how swiftly advancement professionals were forced to set aside thoughtfully crafted strategic plans and reimagine the near- and long-term future of their programs. The pace of change continues as COVID-19 impacts the openings of our universities, schools, and cultural institutions and escalates demands on our health care systems.

At the onset of this crisis, GG+A assembled our thought leadership series, “Fundraising Redefined,” to offer our best thinking to our clients and nonprofits around the globe. In this “Playbook: Rethink the discovery process: Strategies to unlock support from your donors and prospects,” we’ve brought together articles from this series on prospect discovery, one of the most pressing and consistent topics about which my colleagues and I have been asked over these last several months.

While many people believe that the hardest job a major gift officer has is to ask for a gift, through our own survey work and decades of experience training and coaching gift officers, we know that discovery work is, in fact, often the greatest source of anxiety. When skilled gift officers enter gift conversations with an established relationship with the prospect, they have done months—sometimes even years—of work to understand what motivates and inspires the donor, and they understand how their institutions fit into the giving priorities of those donors. Discovery work, in contrast, is a trek into the unknown.

We have all had initial conversations where we personally clicked with the donor, in which the donor gets to share for the first time their appreciation for the institution’s impact on their lives, or in which the timing of outreach is perfectly fitted to the donor’s timing. On the other hand, one of my colleagues recently shared a story of a prospect who accepted an invitation to a first-ever meeting—just so the prospect could express his displeasure with recent institutional decisions, a message delivered with a lot of emotion and at a very high volume, for which my colleague, as a young gift officer, felt ill-prepared. Discovery is unpredictable—which is what makes it both exciting and anxiety-provoking!

Laying the groundwork for successful discovery is paramount to your team’s success. At the same time, almost all of the tools you have used to do this work in the past are now unavailable. So how do we build a pipeline when that seems almost impossible? This is a time to rely on discovery best practices and apply methods that can flex to this global crisis. Weaving together prospect analysis and relevant communications are the centerpiece of successful discovery.

In these articles, GG+A consultants have drawn from their wide-ranging experiences with nonprofits around the globe. You will find in these articles relevant and practical advice. While we may not have addressed all your concerns in these articles, we welcome the opportunity to talk with you about ways to approach your challenges and make the most of opportunities. This is a united effort as we learn from, and support, each other.

To ask questions, learn more about our work and suggest topics for future thought leadership, please contact me at: [shilser-wiles@grenzbachglier.com](mailto:shilser-wiles@grenzbachglier.com).

**Suzanne Hilser-Wiles** | President | 

# The (virtual) arc of engagement

## Moving donor conversations forward

by Melinda Church and Pete Lasher

Early this spring, seemingly overnight, the time-tested habits of Advancement evaporated. In higher education, tried-and-true tactics to engage donors and connect their passions to institutional mission—an invitation to an alumni club event, a one-on-one meeting with over coffee, a class reunion celebration on campus, meetings with faculty leaders—were suddenly rendered impossible.

The tectonic shift in the practice of fundraising caused by COVID-19 has, in many cases, fostered swift innovation and silo-breaking teamwork. Webinars, virtual book clubs, and other digital programs that blur the lines between communications and engagement have flourished. As one of our clients recently told us, mandated social distancing “enabled us to do in two weeks what would have otherwise taken a year.”

Stewardship phone calls and webinars were appropriate, welcomed, and all for the good. But the urgent question for fundraisers now is: What comes next?

### A landscape forever changed

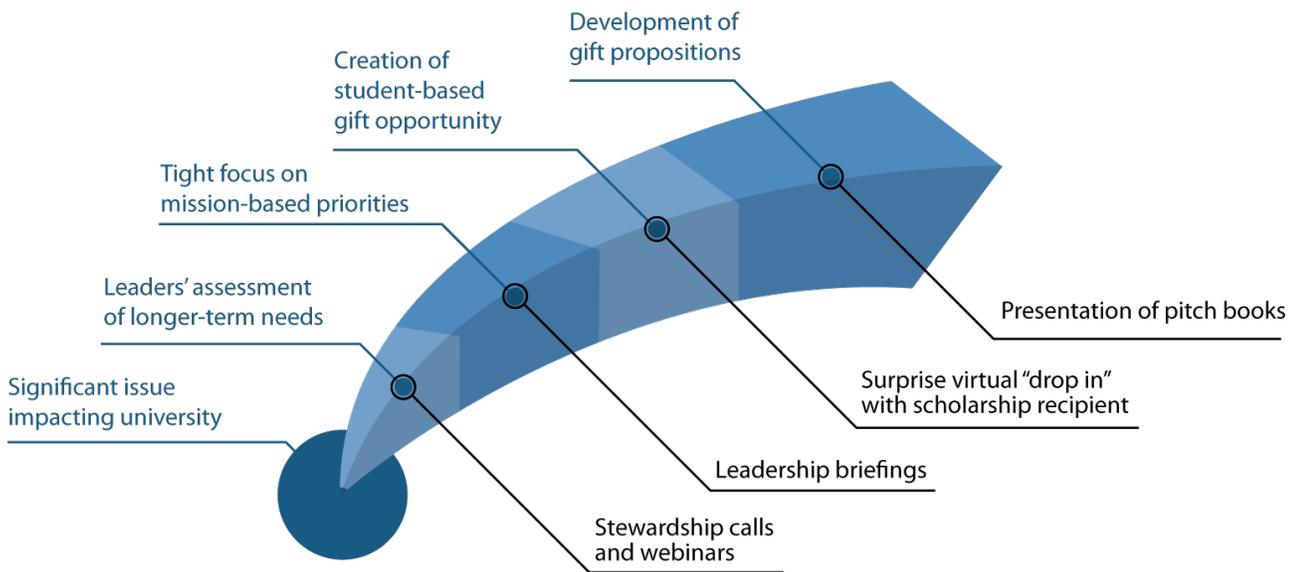
Our collective optimism for a rapid return to the usual development events and in-person meetings has dimmed. In GG+A’s June 21 survey of Advancement professionals, just 20% of respondents said they envision in-person events returning this fall—down from 49% of survey respondents in the pandemic’s early days. And, many Advancement professionals say that even when “normal” returns, this period of remote programming will have forever changed donors’ expectations of how our institutions should interact with them.

To maintain and grow a vibrant base of philanthropic support—to thrive through change and challenge—we believe the surest path is this: Develop entire, strategic arcs of donor engagement that are virtual. The opportunity is to conceive the full donor cycle, from identification through stewardship, using strategies that incorporate and extend the successes of this spring’s “pilot” innovation phase.

## Engagement arcs: Blueprints for the future

The idea is to create clear fundraising strategies using entirely remote communications and engagement opportunities. This is a shoulder-to-shoulder partnership between gift officers and communications staff to think together about the right digital tools and experiences to deepen relationships and advance gift discussions.

You might imagine developing a general plan for a specific giving opportunity, and then adapting it for individual donor needs. Start with the assumption that you'll want consistent, monthly contacts with the highest-potential donors in your portfolio. What are the relationship milestones you want to reach with each of them in six, nine, and 12 months?



Every donor's interests are different, but we'll use a single example to illustrate the principle. Your public university has determined the financial needs of students in FY21 are likely to be 10% higher than budgeted a year ago. Revenues and state support are decreasing, and significant levels of philanthropy are needed to ensure that talented students can enroll, persist, and graduate.

The arc of engagement might start next month with a series of student stories—told through videos and print and electronic publications—that highlight the impact of donor-funded scholarships and aid. Testimonials of alumni who received aid may be shared widely through social media.

Those anecdotes might be followed with the development of a brief presidential white paper that outlines with transparency the emergent mission-driven need for private support for financial aid. Before it is released broadly, the white paper may be shared with small groups of key stakeholders for a facilitated discussion with the president over Zoom. Proposal templates and pitch decks for gifts of various sizes are created. Additional one-on-one or small-group discussions with

university leaders are convened with principal-level donors.

Each of those tangible communications and engagement “products” is a donor touch point—to be used flexibly by gift officers as they tailor the right continuum of engagement for each person. They are complemented with other tactics, such as outreach from a volunteer to discuss why they support student scholarships.

Whether tactics are in-person or virtual, donor engagement strategies ensure consistency in moving relationships and gift conversations forward. We see in this moment the opportunity—and the imperative—to fast-forward lasting innovative approaches for our field. To be sure, institutions across every nonprofit sector need philanthropic support at an ever-growing pace to fuel their mission-driven work.

**Melinda Church** | Senior VP + Managing Director | 

**Pete Lasher** | Senior Vice President | 



University of California, Los Angeles

# It's time to **rethink** the discovery process

by Martin Grenzebach and Pete Lasher

Prior to the COVID-19 pandemic, most higher education institutions recognized the importance of building their major gift pipelines. Investments in wealth screening and affinity models helped to identify pools of prospective donors with the capacity and inclination to support their institutions. Throughout the last five years, GG+A has conducted prospect analyses for more than 30 major institutions and we have found that institutions with more than 200,000 alumni have, on average, 3,100 high value prospects valued at \$492 million who have yet to be engaged by fundraisers.

While the scale may be different, we see a very similar story across our medicine, independent school, social service, and arts and culture clients.

Given this data and the profound funding needs of their institutions, it

is critical that fundraising programs pursue strategies to unlock the support from these potential donors.

The challenge is that prospect discovery is not easy work. GG+A surveys of major gift training and coaching participants have consistently found that they rank the difficulty of securing initial appointments as the most difficult and least satisfying part of their jobs. And fundraisers are too valuable a resource to have them participate in activities that yield limited results.

*So what do we do?*

First, we need to pursue multiple strategies that divide responsibility to engage these prospects between our major gift and annual fund or leadership giving teams. There is a set of leadership annual giving strategies to pursue, but we will concentrate

on the major gift strategy here. We propose our clients undertake discovery initiatives that combine prospect analysis with surveying and message development, and fundraiser training into a collective effort with organization-wide goals and objectives to expand the major gift pipeline.

## **Know your audience**

Before an organization undertakes a discovery initiative, it first must prioritize the prospects it aims to target as part of the effort. That begins by examining prospects with the underlying capacity and affinity to support their institutions. It can then rank the prospects to determine the pool that should become the gift officer's focus.

Once identified, the targeted prospects can be dispersed to gift officers in



Harvard T.H. Chan School of Public Health

manageable numbers, which we suggest is between 10 to 25 prospects at a time. That approach can help ensure gift officers are intentional and disciplined about their work.

*Too often, managers turn their fundraisers loose at this point, but we believe there are additional elements needed to ensure success of the initiative. We recommend our clients survey the chosen pool to understand their attitudes toward the institution.*

Plenty of organizations survey donors to receive feedback on their giving experience, but they rarely query unengaged prospective donors thus missing out at an opportunity to

understand the perspectives of these prospective donors and improve the chances of initiating contact with them. Our clients tell us that alumni are paying attention to their schools' preparations for this school year and many are curious to learn how their alma maters are addressing the challenges presented by COVID-19.

Organizations can then leverage survey results to develop messaging platforms and targeted communications plans that can arm fundraisers with the messages that are most likely to resonate with the target group. They can also use the insights to develop tools such as introductory emails and meeting scripts that gift officers can use to thoughtfully and systematically reach prospects.

### **Training gift officers to succeed**

We believe a formal initiative can take advantage of the current circumstances

and provide an opportunity to engage a set of unengaged stakeholders in a substantive conversation about the future of their institution. Fundraisers will require training to engage prospects in this way. In addition to providing frontline officers with proven techniques for initiating contact and conducting successful qualification visits, the training program should also incorporate the survey's findings as well the messages and tools developed for their use.

As institutions rely on advancement programs to provide an ever-increasing amount of private support, they cannot continue to return to their best donors repeatedly without experiencing donor fatigue. By building a solid discovery process foundation, they can improve their ability to engage a new set of prospective major gift donors to sustain private support growth for years to come.

**Martin Grenzebach** | Chairman | 

**Pete Lasher** | Senior Vice President | 



University of Sheffield

## How annual and leadership annual giving can drive **discovery** in the new era

Along with other facets of Advancement, the pandemic has deeply affected annual and leadership annual giving. In GG+A's most recent COVID impact survey findings, 68% of responding organizations said that their participation numbers had declined relative to 2019. 57% reported a decline in the number of new donors to their organizations.

In May, The Chronicle of Philanthropy reported results of limited polling that suggested one in five US donors surveyed might have stopped giving during the pandemic, and that 53% of donors were approaching their giving more cautiously. In the UK, a recent poll of a representative sample of the general public reported that only 54% had made a charitable gift of any kind in August, the lowest level ever recorded by this particular survey.

The factors driving this decline are clear – the global imposition of

lockdown measures has affected both educational and wider non-profit organizations' ability to run mass participation annual giving events, leading to a significant decline in giving among younger and 'casual' donors.

Encouragingly, the decline in giving among older, wealthier, donors does not appear to have been so marked. In the UK, the AB social grade showed the smallest decline in giving, while in the survey reported by The Chronicle, Baby Boomers were most likely to say they would maintain their giving amounts, compared to only 40% of Millennials.

However, it is certainly the case that our clients working in annual giving know they have a significant hill to climb in FY21, in order to win back lost donors and reinvigorate donor acquisition.

The key question for Advancement leaders in relation to annual giving should now be, *to what purpose?*

### **The Annual Giving Program as Inclination Machine - A Wider Remit than Alumni Participation**

For many of our US educational clients, the single most important measure of their annual giving success has been the participation metric – the percentage of undergraduate alumni who make a philanthropic gift of any amount to the institution that year. However, USNWR has now downgraded the weighting of undergraduate alumni giving in their 2021 methodology, possibly permanently.

In any case, GG+A has always argued for the use of a range of metrics to evaluate annual giving success, that take a more holistic view of the annual giving program than is possible via the participation metric.

The key to our approach to annual giving is our knowledge that a donor's major gift to any non-profit is rarely, if



ever, their first gift. We also know via our extensive work in donor surveying, that it is very unlikely for a donor even to consider making a major gift to a non-profit organization unless it ranks in the top two of their philanthropic giving priorities.

Engaging a donor via multiple 'small' gifts over time, and fostering a deep commitment to the organization through creative and thoughtful stewardship of these gifts, are thus key building blocks in the process that may lead to a donor eventually being 'discovered' and qualified as a potential major donor.

This is what we mean at GG+A when we talk about the key role of an annual giving program as being an 'inclination machine'. Seen through this lens, the truly important metrics for the annual giving program become:

- + Net revenue (net revenue delivers impact, impact drives stewardship)
- + Donor retention
- + Donor upgrade
- + Donor-reported satisfaction with the giving experience
- + Donor-reported commitment to the organization
- + Overall growth in the donor base

Number of 'hand-offs' per year to the major/principal giving and planned giving teams (although these donors should rarely, if ever, be removed from annual giving solicitation)

Adopting these metrics in preference to a narrow focus on participation, should lead to a new vision for annual

giving, focused on the long-term development of donors towards realizing their full philanthropic potential for your organization.

### **Nearer-term tactics to drive discovery via annual and leadership annual giving**

That is the long view of annual giving from a GG+A perspective, and how it should drive discovery. You might reasonably ask what you can do in the nearer-term, to integrate annual giving more fully into a reimagined discovery program.

The good news is that many of the traditional tools of annual giving have retained their currency during the pandemic period, chief among them direct mail. Many of our clients are reporting improved response to direct mail solicitations, due to their donors being at home more often with the time to read and respond. However, you should not be approaching direct mail from the perspective of end-to-end mail solicitation and response, but rather from a multi-channel perspective, recognizing that the mail pack – in conjunction with email - is now your most powerful tool for driving what is most likely to be an online gift response.

The key to this is the performance of your online giving presence - optimizing it both for overall traffic and for the best possible conversion rate from visit to donation. Our clients report that they often receive a significant number of leadership annual gifts simply from the inclusion of leadership giving as an option on reply coupons and online donation pages. So now is an excellent time to be taking a



hard look at your online giving presence, ideally testing it with donors and potential donors, to determine where the scope exists for significant improvements in UX.

You can replicate many aspects of major gift solicitation in print or digital form, for leadership annual giving solicitations. The most notable example of this is the proposal mailing – a high-touch direct mail piece for a specific project or giving priority, which mimics the look and feel of a major gift proposal, sent to a wider audience of potential leadership annual donors. Plan to follow these solicitations up, with phone or email contact from gift officers.

Once these tactics are in place, the important work of the annual and leadership annual giving team becomes the monitoring of appeal response for outliers. You will be looking for the small number of donors, who in response to any annual giving solicitation, give significantly more than requested. Aim to direct these donors into a personalized program of email and telephone stewardship, either by a specially selected team of phonathon callers, or by your leadership annual giving officers. They should also be included in future high-touch solicitations, to secure their repeated giving at higher levels.

With leadership annual giving donors who already have a more established relationship, leadership annual giving officers should be actively considering the possibilities for ‘hand-offs’ to major/principal/planned giving colleagues (mentioned above as a metric).

The Key to this process is a knowledge of donors’ passion areas, acquired through thoughtful relationship building. The new gift officer can then be introduced to the prospect as someone closely connected to the particular area where the donor’s passion lies, and the relationship between gift officers can be transferred. This process should be socialized with leadership annual giving officers as the ideal culmination point of their work. Successful hand-offs should be recognized and celebrated internally on a regular basis.

Finally, I have spoken above about the importance of beginning to measure donor-reported satisfaction and commitment to your organization. There is no better way to do this than by instituting well-designed surveys into the annual giving program, and establishing these as a routine practice. Surveys need not be lengthy. They can be restricted to a few key questions that measure the above metrics, and can also be used as a lead-generation tool for gift officers.



# Adapting the discovery process to the remote environment requires **creative thinking**

by Suzanne Hilser-Wiles

What would you think if I told you in December 2019 that within a few months you wouldn't be able to use the well-established discovery process tools that you've long used to gauge prospects' interest in making a major gift? That you couldn't, for example, meet face-to-face with prospects, nor could you invite them to campus, a museum exhibition or a special performance.

You'd likely assume that your institution would be stymied by those challenges. You might also struggle to imagine how the discovery process could be rethought.

Luckily, we're more adaptable than we may think. While the COVID-19 pandemic has produced myriad challenges for nonprofit institutions, the shift to the remote environment has yielded some significant benefits.

Many institutions, for example, have produced events, materials, and messages that have generated strong interest from prospects in whom they've been interested for a long time but have never managed to connect with in the past. Each of those touch points represents a unique opportunity to deepen relationships with donors and prospects, and those ties are a crucial ingredient to building and sustaining a major gift pipeline. It's critical for institutions to act quickly to ensure they don't squander this moment.

The COVID-19 pandemic has forced institutions to adapt creatively every element of their work—including the discovery process. And it has required them to develop a new set of discovery tools that they can use to determine a prospect's interest in making a major gift. That requires them to have a

reason or purpose to reach out (while making clear that this is not a gift call). Here are several strategies that are working for our clients.

## **Solicit feedback**

Working with our clients, we've found success when the conversation is structured around soliciting feedback on two or three key questions. Here are just two examples:

- One client has shared a draft vision statement from a new dean and asked key prospects if the vision is articulated in a clear way. Is it compelling? Do prospects think this work will make the institution stronger?
- Another has asked for feedback on how the institution is communicating with its constituents during this period.



This approach provides gift officers with the opportunity to engage in a meaningful dialogue with prospects. It also offers a built-in next step as it enables gift officers to report back on how others have answered those questions and, more importantly, how the institution plans to use that feedback.

### **Follow up with event attendees**

A number of our clients have found that their virtual events have attracted prospects who had not previously attended any of the institution's in-person events. That's provided gift officers with an entry point to follow up with attendees.

Similar to the previous idea, gift officers can offer these prospects a forum for their opinions as the institution seeks to ensure it learns about, and maintains, the best ideas that have emerged out of the COVID-19 pandemic. Questions about these events may include:

- What inspired you to attend this event?
- What were your favorite elements of the event?
- What other types of events would you like to see in the future?
- What would make you likely to participate in a future event?

Again, this approach offers a meaningful next step as gift officers can follow up with the prospect to share what they've learned from others about events, as well as to inform him or her about other upcoming events.

### **Host an intimate meeting with the president or CEO**

While remote meetings with an institution's president or CEO should be reserved for the institution's most promising prospects and those with the highest gift capacity, this is a powerful tool in getting a prospect to say "yes" to a discovery meeting.

Luckily, for many it may be easier to find time on the president or CEO's calendar for these activities, especially because these meetings don't require travel time. You might also consider repurposing time your president or CEO might usually earmark for events for small group gatherings online. These meetings can follow a simple structure in which the president or CEO leads a structured conversation about what is happening at the institution and his or her plans for the future. By coming prepared with a few key questions, he or she can seek feedback on the institution's current and future direction.

The advancement officer who is present on the call can then gauge interest by examining who accepts the invitation, who is engaged in the conversation, and what appear to be his or her interests. That information can help gift officers tailor the content they cover in follow-up conversations.



### **Broaden the partners you work with**

Our clients have also found success getting on the calendars of busy deans, program leaders and other key program partners. We suggest institutions seize on this opportunity by leveraging these resources to develop virtual events and/or briefings with interested donors and prospects.

These types of partnerships can be a win-win. In reaching out to prominent faculty and program leaders, advancement may create a more engaging event likely to attract attendees. In addition to helping identify prospects and build enthusiasm for their work, program partners are also deepening their own fundraising experience, a critical skill if they wish to advance to a senior leadership position.

In addition to those who work at the institution, advancement can also use relevant volunteers for events or briefings as a draw to engage prospects and donors and to attract prospects who might otherwise be disengaged.

### **Take advantage of this unique opportunity**

While the remote environment presents countless challenges, it also presents a unique opportunity for institutions to grow their major gift pipelines.

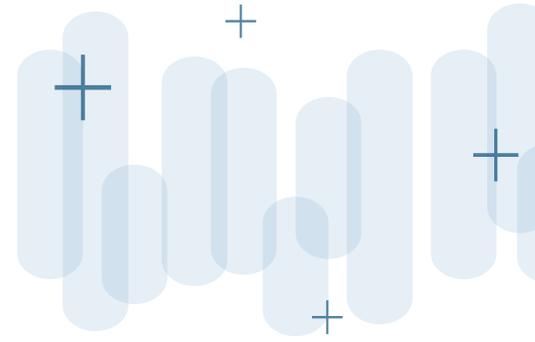
Institutions can build on prospects' engagements with the institution and leverage the advantages offered by the remote environment to remove some of the longstanding challenges associated with the discovery process.

That being said, not everything has to be rethought. Gift officers should continue to follow best practices, such as being clear about what they're doing, asking for permission, and being sensitive to the prospect's relationship with the institution.

If done right, today's creative thinking can produce lasting dividends that extend far beyond the current reality.

**Suzanne Hilser-Wiles** | [President](#) | 

# WHY PHILANTHROPIC ANALYTICS ARE CRUCIAL DURING THE COVID-19 PANDEMIC



It's challenging to navigate the philanthropic landscape amid a global pandemic. With nearly seven million confirmed cases of COVID-19 in the United States, a massive jobs crisis and the sharpest economic contraction in modern American history, there are an ever-growing number of issues competing for donors' attention.

In previous economic downturns, donors have often concentrated their charitable contributions on causes related to near-term societal needs such as food, housing and health care. That has forced nonprofits to develop messages that address how their mission continues to serve and address current needs.

The best way to deliver a message to the prospects most likely to be receptive to them is to leverage the vast amount of public and internal data about them. That approach, which is often called philanthropic analytics, enables nonprofit organizations to make data-driven decisions that can help maximize a development shop's resources by removing the guesswork from areas such as prospect management, staffing structures, and donor communications.

Despite the potential benefits to philanthropic analytics, most nonprofit organizations aren't effectively leveraging their data. For example, only 17% of respondents to Grenzebach Glier and Associates' March 2020 "Nonprofit organizations' use of analytics" survey capture return on investment metrics on analytics and 67% capture ROI metrics on fundraising.

While most organizations are leveraging tools such as wealth screening (84% outsource the functionality), affinity modeling (internal) (57% handle in-house) and visualization (50% handle in-house), a significant share of organizations have plans to invest in philanthropic analytics tools and technology in the coming years. For example, 19% have wealth screening on their road map, 14% have data hygiene and 14% have visualization.

To make sense of those survey results and to examine the current state of philanthropic analytics—and where the field is going—we spoke with **Paul Mateo**, vice president of analytical services, at Grenzebach Glier and Associates.

**Q: Where does philanthropic analytics currently fit within most nonprofit organizations' organizational structure?**

It depends on the organization. For some organizations, it sits within back-office operations. In others, it fits within finance because that's the area of the organization that keeps tracks of numbers. Still others take a different approach in which the vice president for development or advancement or another high-level executive use analytics to examine the efficacy of their organization in delivering their mission, as well as understanding what kinds of constituents are supporting that mission through philanthropy, advocacy, and other activities.

**Q: Based on market-leading institutions, where should analytics fit within most nonprofit organizations' organizational structures?**

Every institution is different, which is why there's no standard approach.

Of course, the question of where analytics fits within an organizational structure may be less important than whether the institution is investing in analytics and using those analytical insights to inform its decision-making processes. Ultimately, every institution needs to know that analytics offer a very strong return on investment, which means that investing in analytics—and leveraging the insights garnered from those investments—will lead to better fundraising.

**Q: What's holding institutions back from implementing changes that will more effectively leverage analytics?**

It all comes down to resources that are in limited supply—money, time and talent. Many major gift officers or fundraisers talk about major gift fundraising as an art rather than a science. But data can help fundraisers reach their goals. For example, if an organization uses data to prioritize prospects, those officers will have a significantly higher chance of meeting their objectives when they meets with the prospect.

**Q: How can organizations just starting out in analytics overcome their initial challenges?**

Every organization needs to start by figuring out what it wants to measure. What are the things within its fundraising programs that have metrics and are measurable? Then, based on those that need metrics, the organization can look at those metrics to determine its progress and its definition of how to gauge success.

Then it can start examining those metrics and come up with a plan on how to engage in what it is measuring, how it is going to measure it, and how it will be consumed. For example, if the metric is participation rate, it can begin examining what feeds into a jump in that number. Is it phone-a-thon, a mailer, or something else?

**Q: How might an organization benefit from implementing an analytics program during the current climate?**

It's even more important within a challenging environment to find ways to demonstrate that strategy and tactics are delivering a clear return on investment. A clear path to ROI is key when resources are limited.

While it can be hard to defer to data when organizations are not used to that approach, the current disruption in institutions' normal operations may make this the right time to push ahead in this direction. As they examine how to move ahead, organizations should embrace and lean into the challenge of balancing the art and science of fundraising.

**Paul Mateo** | Vice President, Analytics | 



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GG+A offers a suite of best-in-class services capable of enabling and supporting high-performing philanthropic programs. We customize program support, coaching, and training to elevate your unique philanthropic goals.

To speak with a GG+A consultant about our services or topics that interest you, please contact Suzanne Hilser-Wiles, [shilser-wiles@grenzglier.com](mailto:shilser-wiles@grenzglier.com)

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