



BWF Client Partner Series

Alexander Oftelie



- Welcome! We are glad you have joined us.
- Use the Q&A Feature to ask questions.
- Any unanswered questions will be addressed individually after the webinar.
- Share your thoughts with us by using **#bwfwebinar**.
- For technical challenges, support is available by emailing bwf@bwf.com.

Upcoming Webinars



All webinars are at 2pm EST/1pm CST.

- **Tuesday, April 7**
Creative Special Event Solutions in Challenging Times
hosted by Wendy Jaccard and Amy Lampi
- **Managing Your Talent in Times of Societal and Economic Disruption**
hosted by BWF Consulting Partner Tahsin Alam and Mark Marshall
- **Managing your Prospect Pipeline: Strategies During Times of Disruption**
hosted by Bond Lammey and Amy Lampi
- **Wednesday, April 15**
Strategic Donor Engagement in the Short-term For Long-term Success
Hosted by Betsy Rigby and Shawn Vogen



Understanding Your Engagement Index

*Priming Your Organization
for Current and Future State*

Our Agenda



- Reframing Our Perspective of Engagement
- What is Our Alignment?
- Methods to Measure
- Impactful Analysis
- Next Steps



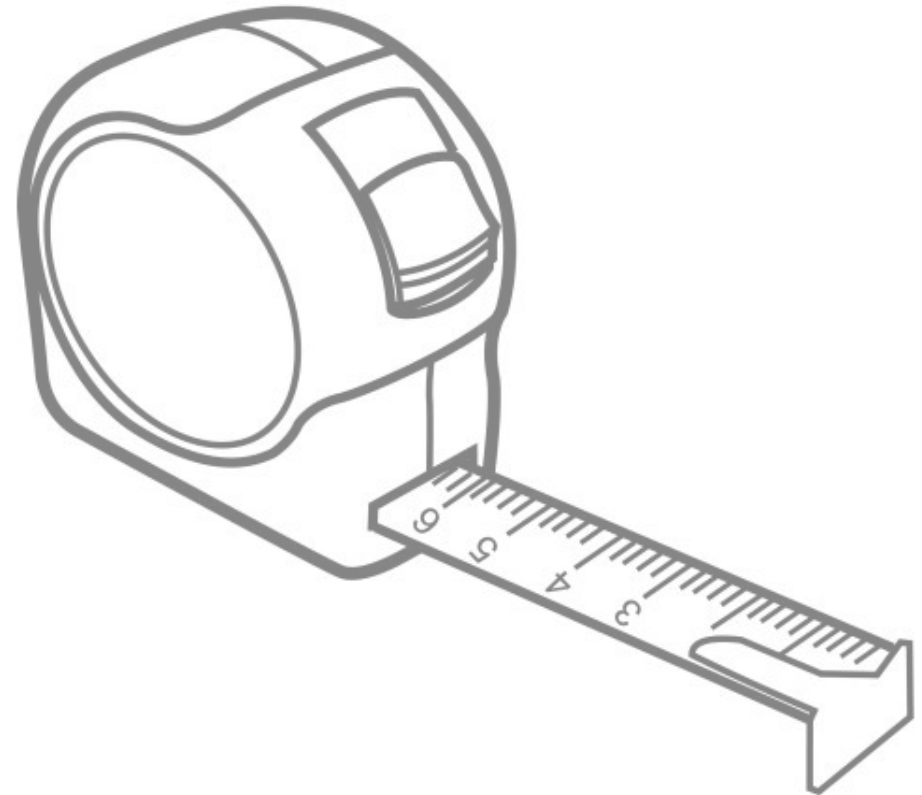
Reframing Our Perspective of Engagement

Reframing our Perspective of Engagement

Common approach—we measure what people do as “expressed engagement.”

Example 1: I care about the University of Minnesota \$1,000 worth.

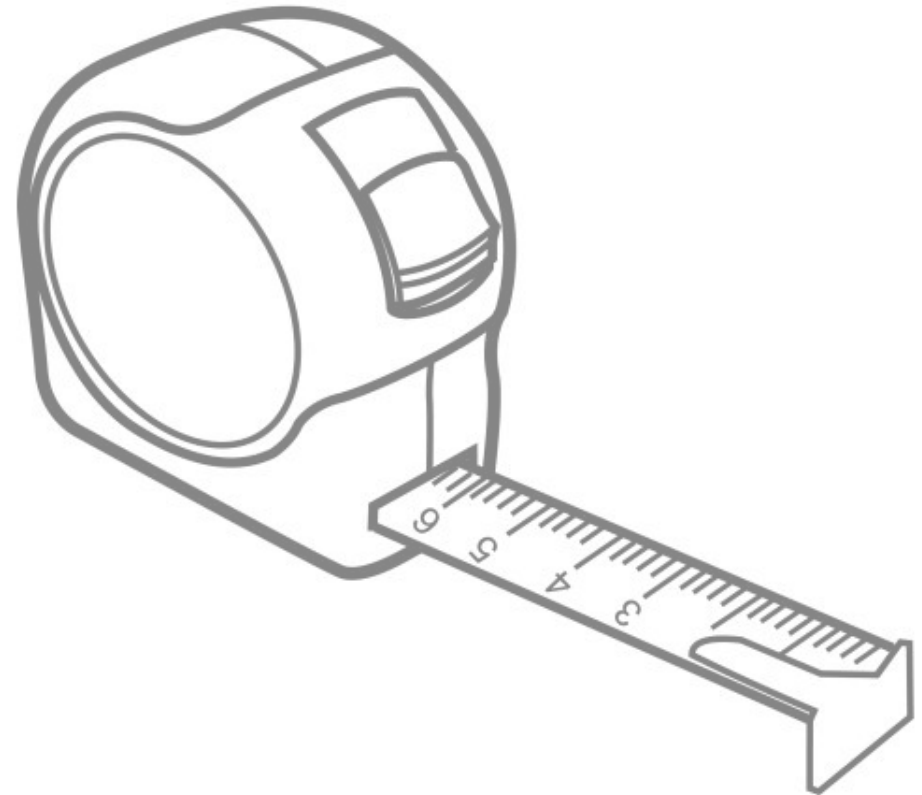
Example 2: A measurement of activity, like events, means I am very engaged.



Reframing our Perspective of Engagement

Common measures focus solely on observed engagement—the “*what.*”

Emerging work is being accomplished at scale, to understand the “*why*”: the true engagement of your constituents which is the greatest predictor of future behavior.



Reframing our Perspective of Engagement

Decision making is based on many factors:

- Psychological
- Cognitive
- Social
- Cultural
- Emotional

How well do we understand these from just activity?



Reframing our Perspective of Engagement



Rational Self

- *Get up early.*
- *Go to the gym.*
- *Study piano.*

Emotional Self

- *Sleep in.*
- *Skip the gym.*
- *Drop piano lessons.*

Understand the Elephant!

Elephant is:

- Emotional (love, sympathy, compassion, loyalty).
- Know what they seek—open to direction.
- Short-term thinker.

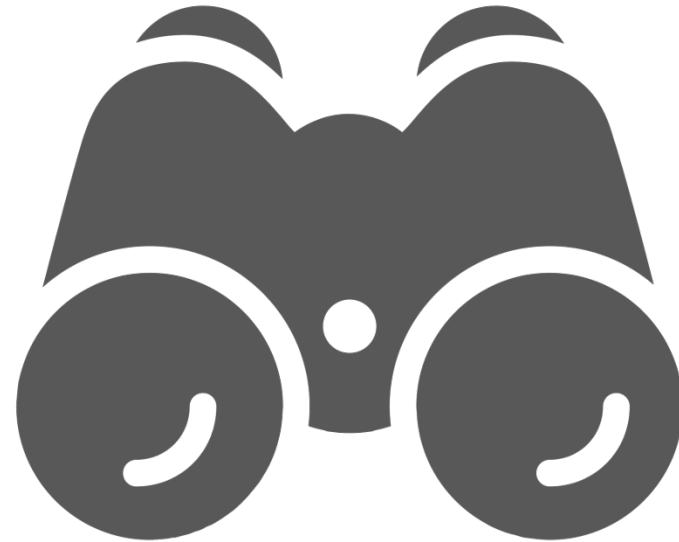
Reframing our Perspective of Engagement

Understand how people feel and align with how.

- *Passive listening (cocktail effect).*
- *Active listening (direct questions).*

Surveys still remain the best option for active listening.

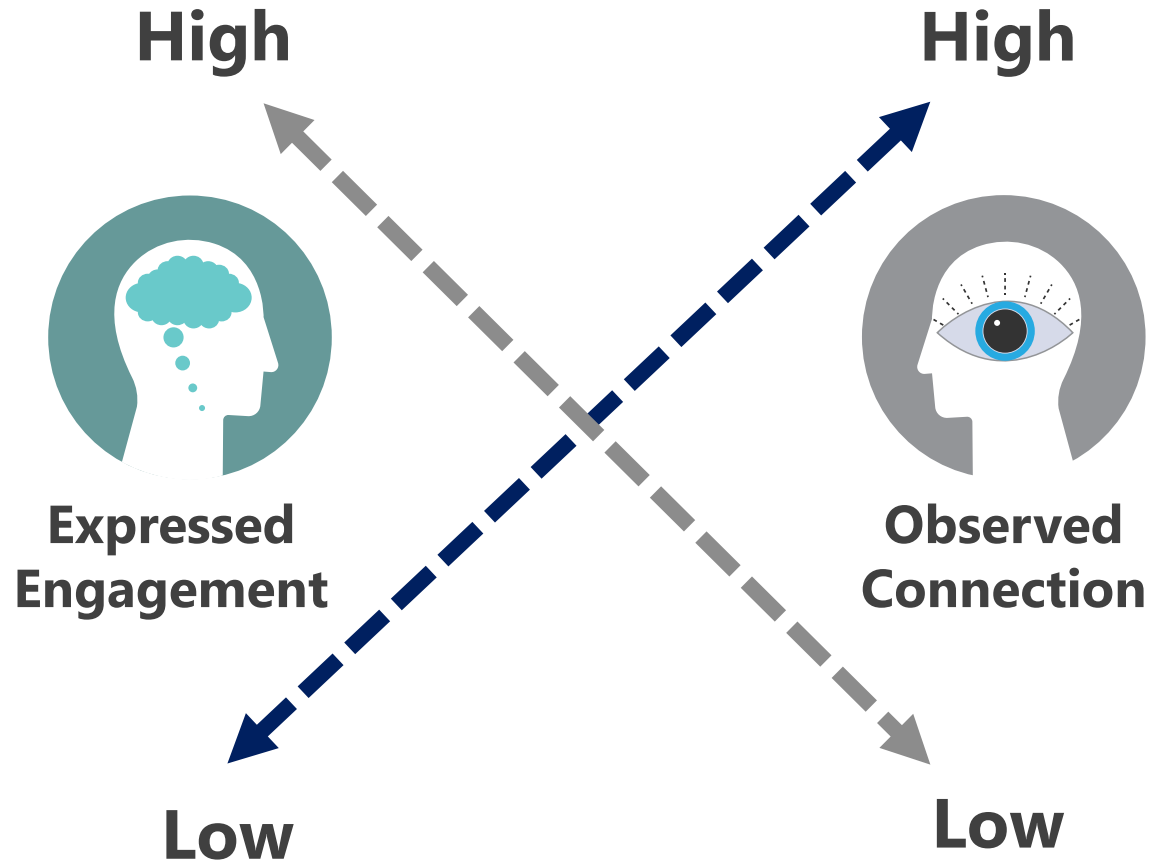
- We ask what we want to know.
- We can identify who is talking.





What is Our Alignment?

What is Our Alignment?



What is Our Alignment?

	Very Connected	Connected	Somewhat Connect	Modestly Connected	Not at all Connected
5-Very Engaged	492	874	2,094	3,235	8,178
4	295	1,290	1,543	4,449	11,953
3	258	1,457	3,417	5,258	20,131
2	283	1,290	3,968	8,291	15,727
1-Not at all Engaged	160	957	4,739	7,078	29,882

Activation

Stewardship



Methods to Capture

Methods to Measure

Satisfaction

- One-off measurements of specific events.
- Limited explanation of future activity or perceptions.

Engagement

- Core “pulse” designed to uncover deeper feeling.
- Foundation for all philanthropic activity.

Methods to Measure

Overall, how engaged are you with BWF?

Core engagement index, comparable across segments and over time.

How proud are you to be associated with BWF?

Pride in affiliation is significant predictor of support and volunteerism.

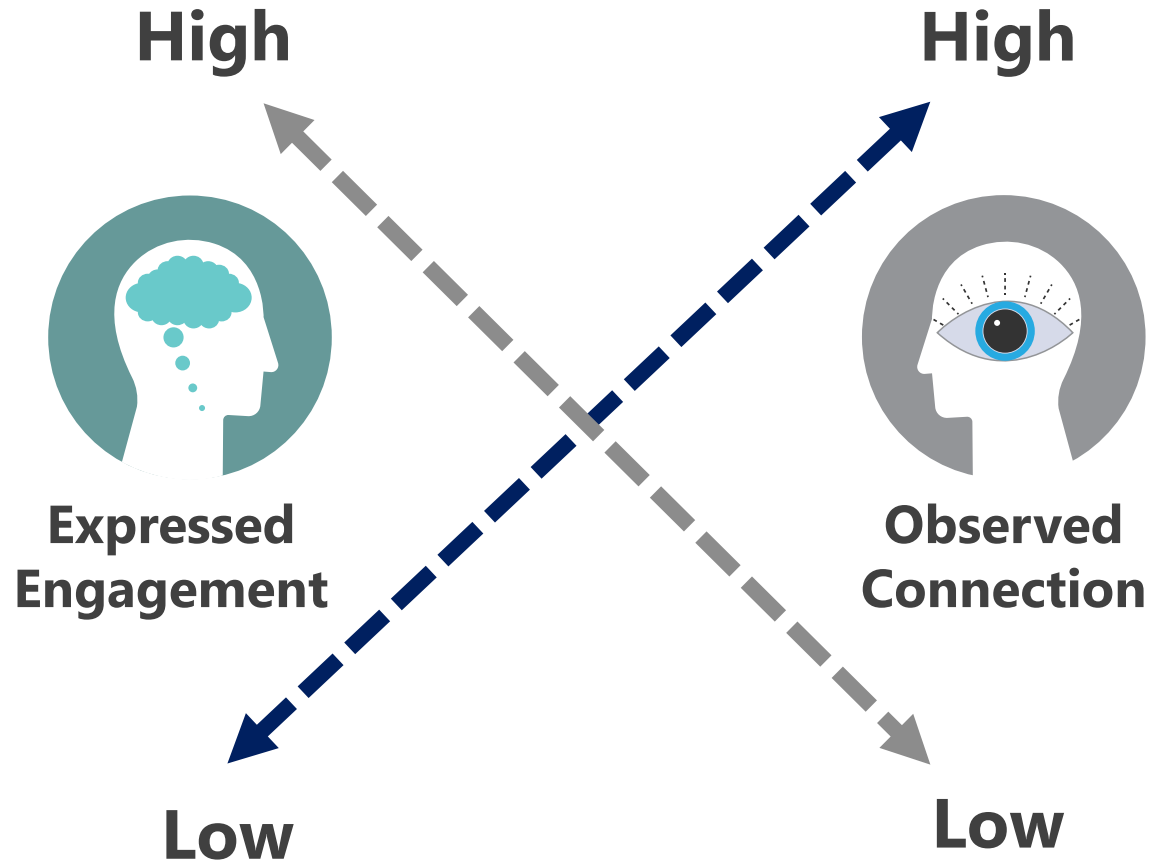
Could you imagine a world without BWF?

Critical in this period of recovery, donors will first support organizations they identify as “essential” to their identity.

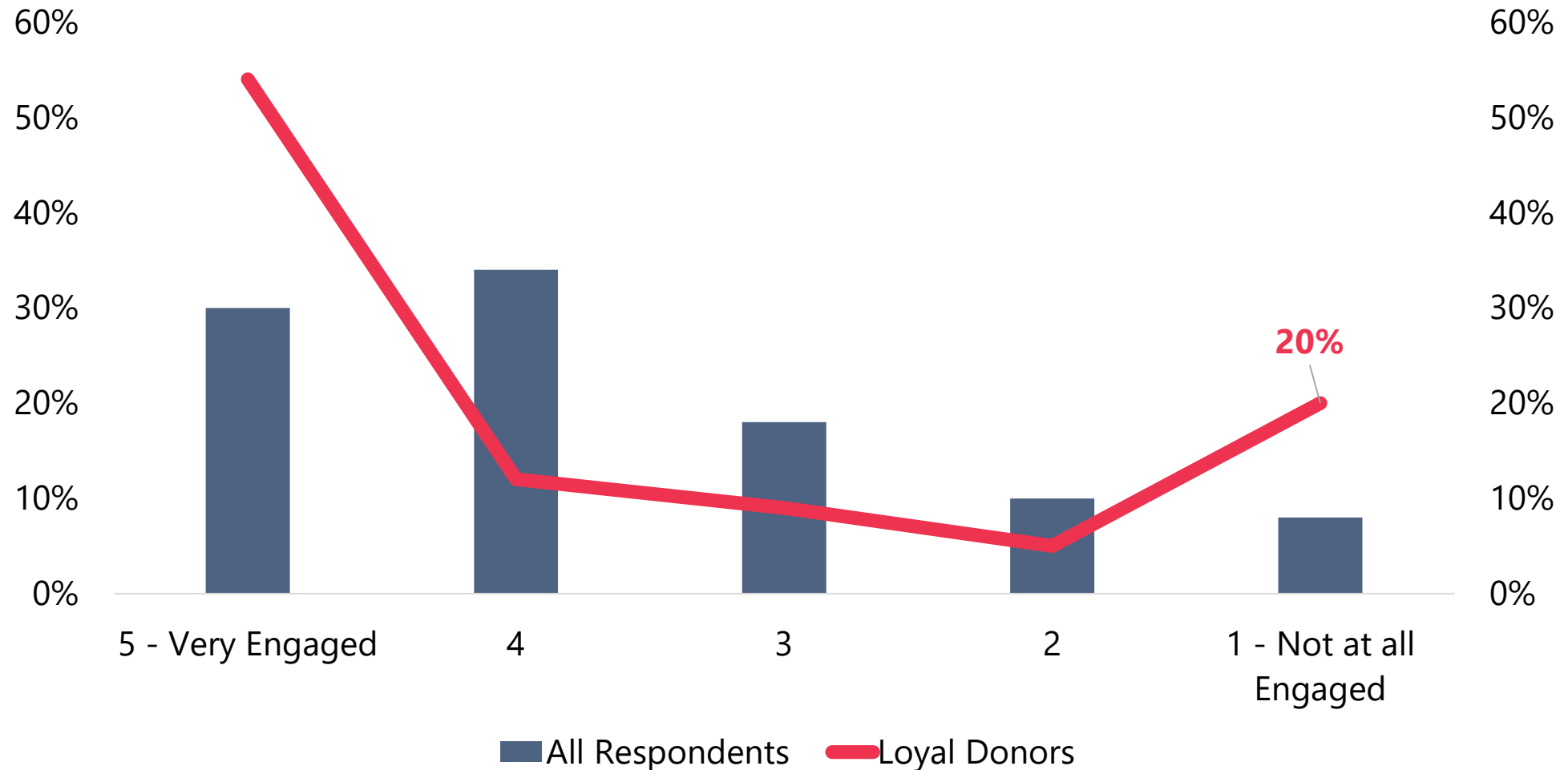
Impactful Analysis



Impactful Analysis



Impactful Analysis



Impactful Analysis



Impact of those expressing high engagement.

Impactful Analysis

Expressed		Observed		
Expressed Engagement	Avg. Lifetime Giving	Avg. Lifetime Gift Count	Avg. Giving Last 5 years	
5–Very Engaged	\$128,633	43	\$90,874	
↑ 4 ↑	\$61,477	35	\$29,271	
3	\$57,505	25	\$41,330	
2	\$41,729	25	\$9,954	
1–Not at all Engaged	\$19,263	13	\$8,685	

Increasing engagement of 4's to 5's projects an ROI >\$9Mil lifetime (N=145)



Next Steps

- Review existing measures.
- Plan for next phase today—*agile*.
- Prepare for long-term effectiveness.
- Align with what we observe.
- Identify target areas—*execute*.

WHAT'S
NEXT





Discussion

Additional Resources Found At:

[Bwf.com/CurrentResources](https://www.bwf.com/CurrentResources)

175713:AWO/cry,