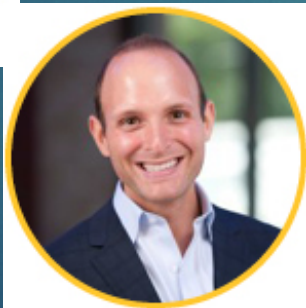


WELCOME



Emergency Fundraising Strategies for Your Organization



April 7, 2020



Today's Moderator



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HOUSEKEEPING

- > All attendee lines are muted for better audio quality.
- > Please use the chat window for questions.
- > Slides and recording will be available after the meeting.
- > An evaluation will be sent following today's presentation.



Donor Communications During COVID-19

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What we're hearing



- ▶ Questions about whether to move forward with “business as usual” (newsletters, magazines, donors reports, appeals, giving days)
- ▶ Concern about people being inundated with emails and virtual meeting requests
- ▶ Differing opinions about the advisability of sending direct mail
- ▶ Varying levels of comfort with technology
- ▶ Uncertainty about whether it is appropriate to continue fundraising or even communicating with audiences from organizations not directly involved in COVID-19 relief efforts
- ▶ Above all, fear of being seen as tone-deaf

Communications strategies



- ▶ No communication should be just a crisis communication: always connect the moment to your mission and message.
- ▶ Find a sweet spot between alarmism and “now more than everism.”
- ▶ Be candid, focused, and succinct.
- ▶ This is an okay time to ask for what you need.
- ▶ Don’t shy away from sharing positive news in a sensitive way.
- ▶ Give people a way to stay connected from home. If you don’t yet have a digital engagement strategy, now is the time to build one.

Sample messaging guidelines



Major donors

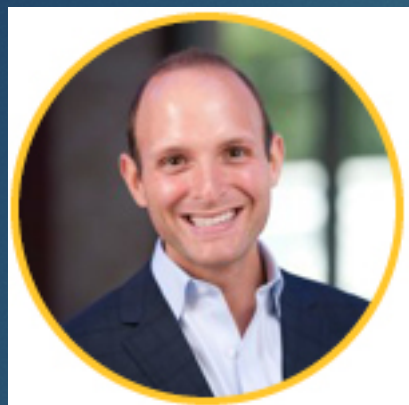
- Express gratitude for the loyal support of your donor family.
- Highlight philanthropy's role in addressing challenges.
- Share as much detail as possible about how the pandemic is impacting organizational capacity.
- Highlight evidence of your team's creativity.
- Affirm your commitment to learning from the present moment and continuing to pursue your strategic priorities.

Annual donors

- Emphasize the role of annual operating support in ensuring you can react quickly and appropriately to needs as they arise.
- Remind donors of the problem(s) you are trying to solve and why doing so is particularly important in this moment.
- Quantify the impact closures/cancellations will have on your ability to carry out your mission.
- Provide an opportunity for donors to pitch in if they are so compelled.

Broader audiences

- Share information about what you are doing to support your program participants in this time of need.
- Invite audiences to engage with you virtually, pointing towards resources on your website and social channels.
- Spotlight examples of how donors and friends are helping you and each other.
- Emphasize the power of giving and include a soft ask wherever appropriate.



Major Gifts Fundraising: Navigating the Challenges During COVID-19

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Fundraising Framework



Strategies to Implement: Case



- ▶ Create a target case for the response
- ▶ Tell your story and impact on your communities
- ▶ Showcase your role during the crisis
- ▶ Share your commitment to keeping staff and volunteers safe



Strategies to Implement: Leadership



- ▶ Virtually engage board members, volunteers, and advocates in this work
- ▶ Staff:
 - ▶ Engage your CEO / ED to contact the top 15/20 donors
 - ▶ CDO to contact next 20/30 donors
- ▶ Board:
 - ▶ Communicate updates, call a board meeting
 - ▶ Utilize your board in new ways



Strategies to Implement: Prospects



- ▶ Prioritize based on highest yield / best ROI
- ▶ Mail/email appeals – Reimagine an appeal or launch a new one
- ▶ Personal contact – Consider soliciting a major gift
- ▶ Events – Repurpose sponsorships, tickets, support
- ▶ Corporate giving – Tap into opportunities given increased corporate support
- ▶ Foundation giving – Look for grant opportunities around COVID-19 response



Strategies to Implement: Plan



- ▶ Identify response funds and respond quickly
- ▶ Opportunity to highlight partnership and collaboration
- ▶ Focus on stories of need and impact
- ▶ Take lessons from other disasters
- ▶ Proceed with campaigns
- ▶ Event response strategies



Considerations



CHALLENGES:

- **Personal concerns.** Health and the economy are likely front of mind for prospective donors. Always begin conversations by checking in.
- **Technology.** Be sure to run through virtual visits and test media. Use the donor's preferred platform for check-in meetings to ensure understanding of functionality and features.

FOUNDATION CONSIDERATIONS:

- **Open communication.** Check in with the organization's contact or program officer to discuss funding opportunities, shifts in timelines for RFPs or reporting, and next steps. Be sensitive to their process.
- **Continue to convey the need.** Provide impact stories or quotes, videos, photos to funders to keep your organization top of mind.

OPPORTUNITIES:

- **Desire to connect.** Leverage the increased need to connect and engage to schedule meetings with prospective donors.
- **Time.** Given work-from-home and shelter-in-place mandates, prospective donors and volunteers alike have increased flexibility.
- **Highlight giving.** Inspire others with a testimonial from a donor who recently stepped up.

CORPORATE CONSIDERATIONS:

- **Shift in philanthropic focus.** Monitor CSR trends as companies move to meet the needs of their communities through donation drives, financial contributions, or pro bono services.
- **Assess current climate.** Leverage existing relationships to gain insight into how the crisis affects corporate partners and their philanthropic priorities. Be sensitive when discussing proposed or future support.

ACTIVITY IDEAS:

- **"In-person" online.** Develop virtual visit structure and speaking notes. Make the visit tangible by presenting the host's screen to share photos, charts, and digital booklets/case statements.
- **Close the social distance.** Consider hosting a cultivation "social hour" led by organization leadership, campaign chair, and organization subject matter experts (physician, teacher, curator).
- **A personal touch.** Send handwritten notes to close friends of the organization to break through digital noise.

Crisis Donor Development Cycle



	STEWARD	ASK	BRIEF	CULTIVATE	DISCOVER
Priority:	First priority (complete ASAP)	Second priority (complete within 1-2 weeks)	Third priority (complete within 1-2 weeks)	Fourth priority (complete within 2-3 weeks)	Ongoing
Definition:	Existing donors and priority prospective donors regardless of stage.	Prospective donors who have been briefed and are ready to receive an ask.	Prospective donors who are ready for a pre-ask conversation.	Those with limited knowledge of the organization.	More info needed to determine ability and propensity to give.
Action Item:	Share update from the organization to reaffirm sense of partnership.	Move the visit to donor's preferred virtual platform.	Move the visit to donor's preferred virtual platform.	Keep informed, share expertise/resources, invite involvement.	Develop prospect / engagement strategy.
What to Consider:	<ul style="list-style-type: none"> As key stakeholders, donors deserve candid, frequent, and personal comms from organization leadership or relationship manager. Weave spirit of stewardship into constituent conversations. 	<ul style="list-style-type: none"> Assess possible obstacles to review proposal. Stick to the plan but be flexible in timing and pledge redemption period. Remember, prospective donors in this stage are anticipating an ask. 	<ul style="list-style-type: none"> Proceed with meetings already scheduled. For those not yet scheduled, seek feedback on timing. Acknowledge changing times but avoid assuming the prospective donor's preference re: an ask. 	<ul style="list-style-type: none"> How might prospective donors continue to learn about the organization? Is the organization filling a community need in response to the crisis? Can prospective donors give or get involved? 	<ul style="list-style-type: none"> How has the crisis impacted the prospective donor or their business? Do we see them or their business publicly supporting other organizations at this time?
Key Points to Cover:	<ul style="list-style-type: none"> Check in Thank for support Share the plan Answer questions Update as plans evolve 	<ul style="list-style-type: none"> Check in Share how the crisis adds to or increases the need in the immediate and long-term Make the ask 	<ul style="list-style-type: none"> Check in Share the response plan and evolved case Seek permission to present a proposal and confirm timing 	<ul style="list-style-type: none"> Email from leadership with response plan If appropriate, share opportunity to give to a crisis response fund 	N/A
Vehicles:	Phone call or personal email. Additionally include on all community-wide emails from leadership.	Video conference or phone call. Additionally include on all community-wide emails from leadership.	Video conference or phone call. Additionally include on all community-wide emails from leadership.	Include on all community-wide emails from leadership.	If already in receipt of community-wide emails, continue including.
Lead:	Organization Leadership/ Relationship Manager	Assigned solicitor(s)	Assigned solicitor(s)	Relationship Manager	N/A



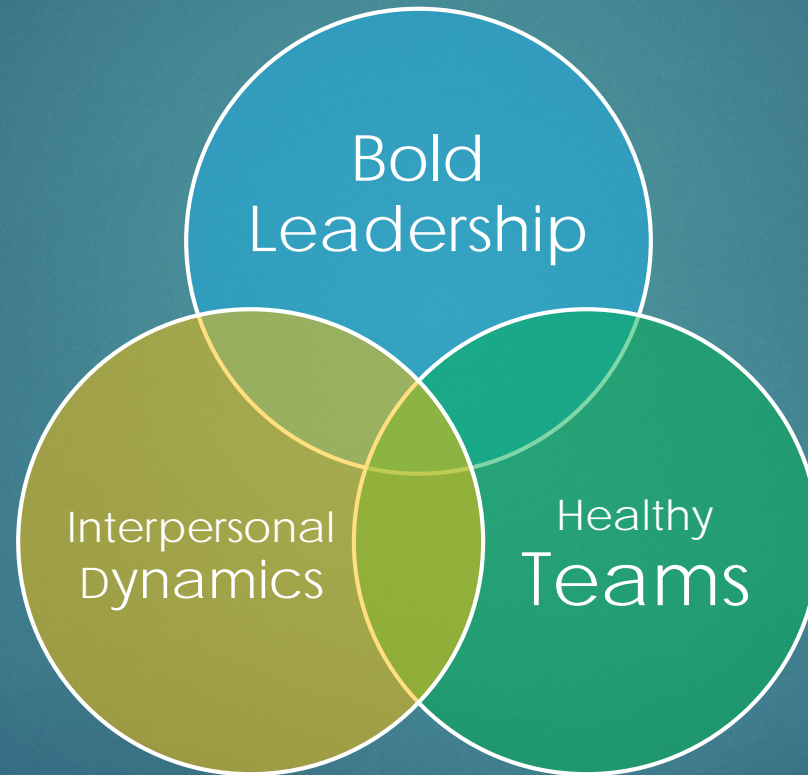
Keeping your Organization Whole

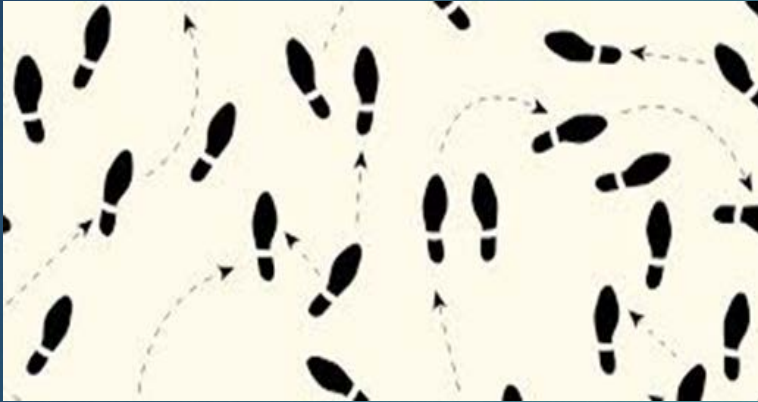
Transitioning through COVID-19

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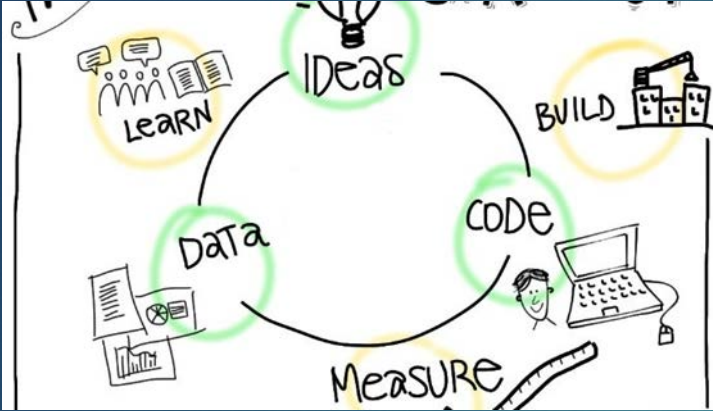
Temperature Check





- ❖ Collect and **share** information
- ❖ Drive for **results**
- ❖ Be decisive and **truthful**
- ❖ **Innovate** and pivot

Bold Leadership



- ✓ Work and **measure** your plan
- ✓ Protect your **culture**
- ✓ **Energize** your mission
- ✓ Embrace each other and your **partners**

Healthy
Teams



- Create an **interactive** workplace
- **Listen** with empathy
- Continue dynamic **reporting**
- Be **thankful** and **celebrate!**

Interpersonal Dynamics



Thank You

Upcoming Programs

- ▶ May 15th – Breakfast Workshop Series
- ▶ June 12th – Breakfast Workshop Series
- ▶ July 15th -16th – Fundamentals of Fundraising
- ▶ September 11th – Breakfast Workshop Series
- ▶ October 2nd – 44th Annual Philanthropy Awards Luncheon
- ▶ November 13th – Breakfast Workshop Series
- ▶ December 4th – AFP Chicago Annual Meeting