

Fundraising During the Crisis



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Recording & slides will be available after the presentation at cvnl.org

AGENDA

1. Lessons, from Disasters and Recessions

2. Sources of Funds, New and Traditional

3. Taking the Right Steps, Practical Recommendations

Issues Most Cited In Pre-Seminar Survey



- Overcoming Uncertainty
- Tips on Sources of Funds – New & Traditional
- What to do about fundraising events
- If & How to Ask for Gifts (and ask again)
- Competition between “high-need” agencies and the rest of the sector
- What Happens to Giving in a Recession or any Crisis
- How Do We Best Support Each Other

Relevant Lessons

From Disasters and Recessions



- Donors Become More “People-Centric”
- 2008-09 Great Recession, Giving Decreased 3.6%, increased to HS by 2.3%
- 2009-11 , Giving increased by 2.2%, increased to HS by 22%
- Historic Government Response – federal and local
- Aggregated Funding Buckets, Emerging Daily



Sources Of Funds

New and Traditional

- Government
 - CARES Act Main Provisions
 - State
 - Local
- Foundations, Corporations And Donor Advised Funds
- The Agency's Donors





POLL:

Have you applied
for any relief
connected to the
CARES Act?



POLL:

Was one of
your applications
for one of the
SBA loan applications?

POLL:

For those of you who have applied for SBA loan, please choose one of the following answers:

- i. The information I received back was useful in moving us through the process of getting a loan
- ii. I received funding approval!
- iii. I received information that was confusing
- iv. I have heard nothing



Sources Of Funds

New and Traditional

- **Government**
 - CARES Act Main Provisions
 - State
 - Local
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- The Agency's Donors





Let's Address The Poll



POLL:

Have you received any unsolicited emergency relief funds from corporations or foundations?

POLL:

Are any of you in conversation with other organizations to collaborate in any way (programmatically, fundraising, advocacy) and have collective mission impact since COVID 19?



Sources Of Funds

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Let's Address The Poll

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Useful Links

New and Traditional Sources of Funds

- [Council On Foundations](#) list of curated response funds
- [California Disaster Relief Loan Guarantee Program – COVID-19](#)
- CARES Act Links:
 - [CARES Loan: Paycheck Protection Program](#)
 - [Economic Injury Disaster Loans \(SBA\)](#)
 - [Small Business Lending Fund](#)
- [Independent Sector Letter: Sign on to get data on SBA Loans](#)
- [Marin Small Business Development Center](#)
- [SVCF COVID-19 Response](#)
- [Partnership Resources Group \(PRG\) COVID-19 Resources](#)
- [Center for Volunteer & Nonprofit Leadership \(CVNL\)](#)

Taking The Right Steps

Our Main Topics

- Your Donors
 - Knowing Where You Sit in the Landscape
 - Events & Appeals
 - Communications & Messaging
-



Taking The Right Steps

Enduring Principles

- Increase communication
- Interpret Financial Impact
- Show Empathy & Confidence
- Segment Your Donors; Offer Special Insider Briefings
- Do not abandon your previous fundraising plans. Yet.
- Develop a short-term Action Plan

Taking The Right Steps

Your Donors

- The most reliable and renewable source of support
- Want to Know How COVID-19 is Affecting you
- Want to know how you are taking care of your clients and your staff
- Are right now contemplative about what's most important to them
- Are available and interested in continuous communications

Taking The Right Steps

Knowing Where You Sit

- An important context for your fundraising decision-making
- ALL nonprofits are impacted by and responding to COVID-19
- Front-line: food, shelter, medical care, childcare
- Second Responders: schools, disability services, arts, environment, spiritual
- You are a spokesperson for the mission, not just your agency



POLL:

*Has your organization
Postponed, cancelled,
or gone to virtual events?*

Taking The Right Steps

Events

- Primary Questions to Consider:
 - What is/was the primary goal -- \$, coming together, tradition?
 - How critical is the net income from the event?
 - How embedded is the event in your culture?
 - How far down the road are you– sponsors, vendors, contracts, deposits?
- Evaluate Your Options:
 - Cancellation until next year. Is there enough event resiliency?
 - Postponement. Recommend not before spring 2021
 - Reinvent as Virtual. Requires:
 - The technology
 - The time to pivot
 - Different focus, e.g. silent auction vs. Fund-A-Need
 - Collaborate with a Mission-Aligned Agency.
- Good Resource – The Chronicle of Philanthropy [Article](#) on Event Cancellations



POLL:

*Has your organization
issued a specific
COVID 19 Appeal?*



POLL:

*Has your organization
Experienced a Surge
in Individual Gifts?*



POLL:

*Has Your Organization
Established a Specific
COVID Emergency Fund?*

Taking The Right Steps

Appeals

- Questions and Tips:
 - Is/was there an existing plan for an appeal this time of year?
 - How critical is the income from that appeal?
 - If I primarily use direct mail, can I capably convert to an online appeal?
 - Use where you sit in the community landscape as your guide on timing
 - Avoid asking for a bail-out. Even loyalists don't want a sinking ship.
 - Appeals aren't the only way. Put your DONATE button in all communications.



Let's Address The Poll

Taking The Right Steps

Communicating With Your Donors

- Continuous Non-transactional Communication; Err on the Side of More
- The opportunity we've all been waiting for: Getting Closer to Your Donors
- Always Reinforce 3 Things:
 - *Your mission and why you exist*
 - *How COVID 19 and the recession is impacting your clients*
 - *What your agency is doing in response*
- Bring the message alive with real stories. People are ready to listen.
- Use your technology (and intuition) to segment your donors. Prioritize ROI.
- Now's the time to expand or initiate use of social media
- Establish a Communications Calendar and engage all your assets – staff, Board & volunteers

Q&A Session

At this time we would like to invite your additional questions.

Time permitting we hope to respond to everyone's inquiries



Partnership Resources Group

Additional Resources

partnershipresourcesgroup.com/covid-19_resources

cvnl.org/covid-landing-page



Partnership Resources Group

Thanks for joining us!



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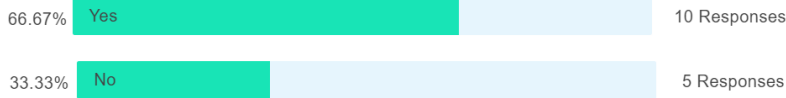
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Recording & slides will be available after the presentation at cvnl.org

1 of 9. Have you applied for any relief connected to the CARES Act?

15 of 28 Attendees responded

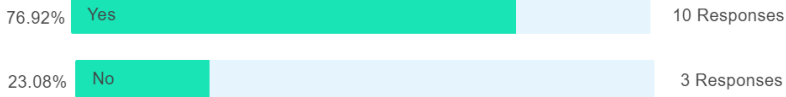
Multiple choice with single answer



2 of 9. Was one of your applications for the SBA loan?

13 of 28 Attendees responded

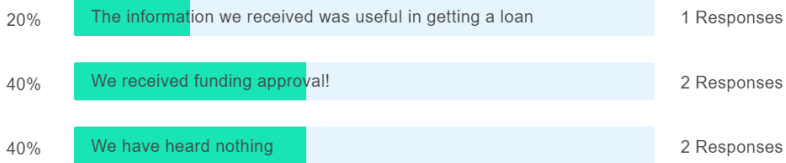
Multiple choice with single answer



3 of 9. For those of you who have applied for SBA loan, please choose one of the following answers:

5 of 28 Attendees responded

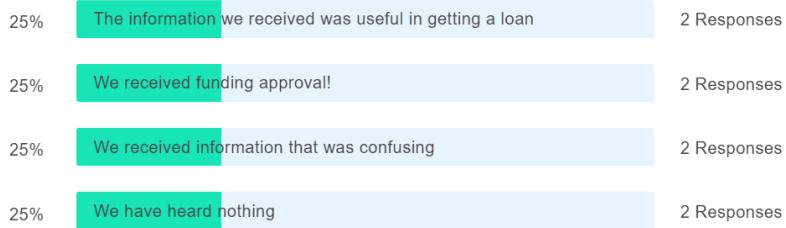
Multiple choice with single answer



1 of 7. For those of you who have applied for SBA loan, please choose one of the following answers:

8 of 30 Attendees responded

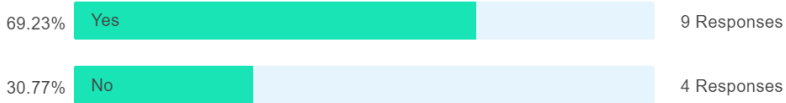
Multiple choice with single answer



4 of 9. Have you received any unsolicited emergency relief funds from corporations or foundations?

13 of 28 Attendees responded

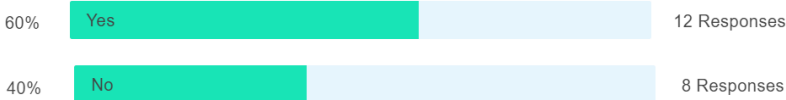
Multiple choice with single answer



2 of 7. Have you received any unsolicited emergency relief funds from corporations or foundations?

20 of 30 Attendees responded

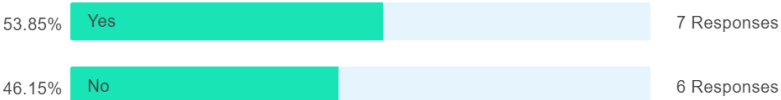
Multiple choice with single answer



5 of 9. Are you in conversation with other organizations to collaborate in any way and have collective mission impact since COVID-19?

13 of 28 Attendees responded

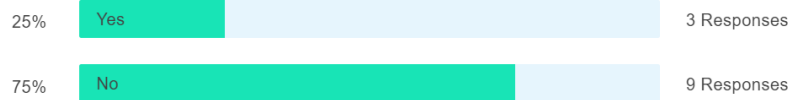
Multiple choice with single answer



3 of 7. If you are in a collaboration with other organization(s), have you asked for or received funding as a result?

12 of 30 Attendees responded

Multiple choice with single answer



6 of 9. Has Your Organization Postponed, Cancelled or Gone to Virtual Events?

20 of 28 Attendees responded

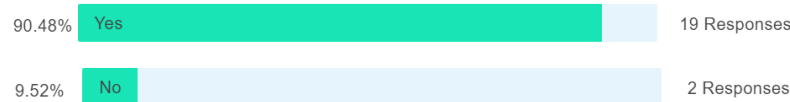
Multiple choice with single answer



4 of 7. Has Your Organization Postponed, Cancelled or Gone to Virtual Events?

21 of 30 Attendees responded

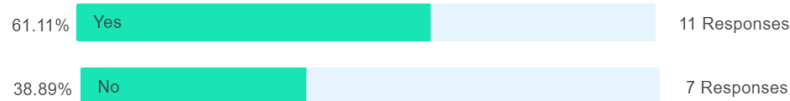
Multiple choice with single answer



7 of 9. Has your organization issued a specific COVID-19 Appeal?

18 of 28 Attendees responded

Multiple choice with single answer



5 of 7. Has your organization issued a specific COVID-19 Appeal?

22 of 30 Attendees responded

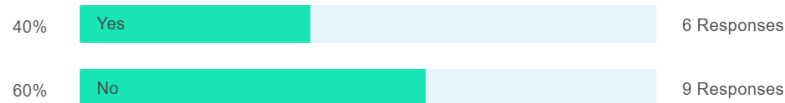
Multiple choice with single answer



8 of 9. Has Your Organization Experienced a Surge in Individual Gifts?

15 of 28 Attendees responded

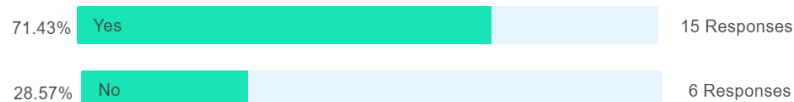
Multiple choice with single answer



6 of 7. Has Your Organization Experienced a Surge in Individual Gifts?

21 of 30 Attendees responded

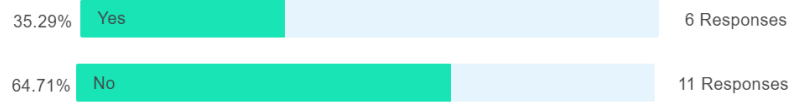
Multiple choice with single answer



9 of 9. Has Your Organization Established a Specific COVID-19 Emergency Fund?

17 of 28 Attendees responded

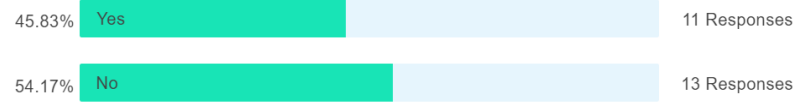
Multiple choice with single answer



7 of 7. Has Your Organization Established a Specific COVID-19 Emergency Fund?

24 of 30 Attendees responded

Multiple choice with single answer





PRG's 7-step Path for Meaningful Donor Conversations in the COVID-19 Era

The Critical Context: The donor who has contributed to you prior to this crisis already believes in your organization and the mission is important to them. You don't have to convince them of why your work is important. They trust you to use their money effectively. You can trust that they will continue to invest.

- **Step 1: *Segment and Assign Your Donor List.*** That way you can prioritize your contacts and know who you're talking to. Sample segments:
 - Major Donors
 - Those who give regularly, regardless of gift size
 - Members of your Legacy Society (if you have one)

Talk to all segments. Then, match the right donor with the right caller – you, a fellow staff member, a Board member, a trusted volunteer.

- **Step 2: *Ask How They Are Doing.*** It's important to understand how the crisis is affecting them, not only sheltering in place but the impact on their job, their business and their family.
- **Step 3: *Thank Them for Their Last Gift and their History of Support.*** Tell them how you spent that gift and, most importantly, how your clients benefited. This is simple, effective stewardship.
- **Step 4: *Describe How Your Clients/Participants Have Been Affected by this Crisis.*** Share a personal story of one of them.
- **Step 5: *Describe How Your Organization Has Adapted to Serving More Clients or Different Needs.*** This is your chance to spotlight your creativity and innovation, while reinforcing your core mission.
- **Step 6: *Tell a Story About a Staff or Volunteer Hero.*** The toll the crisis has taken on the workforce is important to donors.
- **Step 7: *Explain What Your Major Challenges Are.*** Like: managing a remote workforce AND on-site workers, deciding whether to cancel or postpone your Gala, loss of income from government contracts, the uncertainty of when the SIP will end, navigating the complex government loan processes.

Some Final Tips...

- ***Remember, this is not a solicitation.*** It's an honest conversation, a great cultivation opportunity, and now is the perfect time to tell it. BUT, you are providing them with a tacit invitation to make a gift or ask how they can help.
- ***Ask for their advice.*** Knowing what they know about your agency and what you've told them, what would they suggest can be valuable? Draw on their experience. You're not obliged to enact their suggestions but make them a thought partner.
- ***Log the conversation.*** There's information captured that will be important later. Make sure it's entered into their file. The timing and level of an ask will be guided by this invaluable discovery.