

Fundraising During the Crisis



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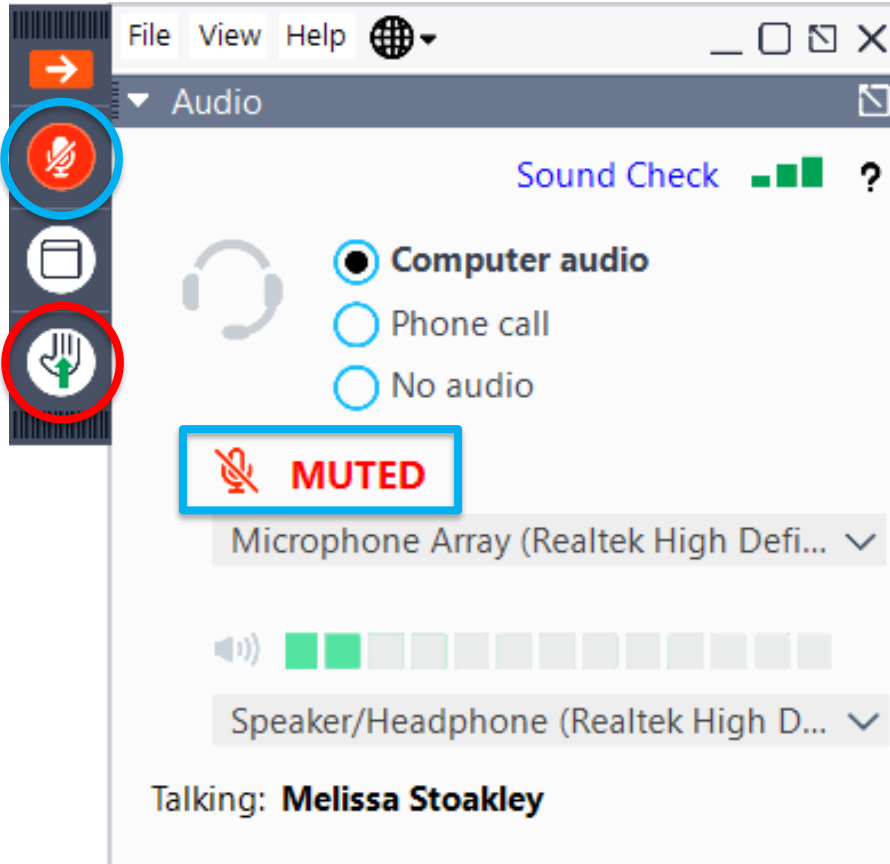
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Technical Tips:

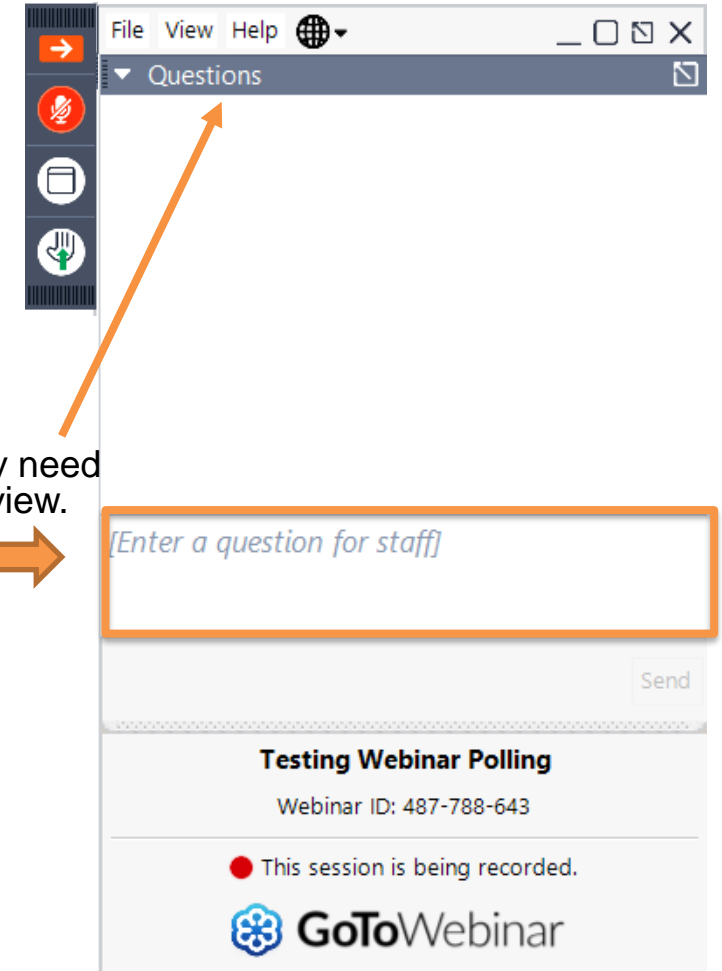
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(it will turn green)



Raise those hands!



Q&A Portion
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AGENDA

1. **Lessons,** from Disasters & Recessions
2. **Sources of Funds,** New & Traditional
3. **Taking the Right Steps,** Practical Recommendations

Issues Most Cited In Pre-Seminar Survey



- Overcoming Uncertainty
- What Happens to Giving in a Recession or any Crisis
- Tips on Sources of Funds – New & Traditional
- What to do about Fundraising Events
- If & How to Ask for Gifts (and ask again)
- Competition Between Agencies
- How Do We Best Support Each Other

Relevant Lessons

From Disasters & 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 & Traditional

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



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 & Traditional

- **Government**
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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?*



Sources Of Funds

New & Traditional

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



POLL:

*Collaborating:
If you are in a collaboration with other
organization(s), have you asked for or received
funding as a result?*





Let's Address The Poll

Sources Of Funds

New & Traditional

- Government
 - CARES Act Main Provisions
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 - Foundations, Corporations And Donor Advised Funds (DAF)
 - **The Agency's Donors**
-



Useful Links

New & 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

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 In The Landscape

- An important context for your fundraising decision-making
- ALL nonprofits are impacted by and responding to COVID-19
- Some are “Front-line:” food, shelter, medical care, childcare
- Others are “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



Let's Address The Poll

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-19 Emergency Fund?*



Taking The Right Steps

Appeals

- Questions & 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

Lay Leadership & Stewardship

- **It's a New Day for Board Members too.** How are they being engaged?
 - Board members should be mobilized as a part of the fundraising “workforce”; most now have the time.
 - Consider a zoom training just for trustees
 - Many who have been on the fundraising sidelines can now jump in
- **Donor Stewardship is everything right now.**
 - Evidence that many donors are reserving funds for the long haul
 - Board members are ideal stewards
- **Reserves and Endowments are Critical Now** – and everybody knows it.
 - Now is a great opportunity to add planned giving to donor conversations
 - Planned Gifts are “plus” gifts

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

The image shows a screenshot of the GoToWebinar interface. On the left is a vertical toolbar with icons for chat, microphone, document, and hand. The main panel is titled 'Questions' and contains a text input field with the placeholder text '[Enter a question for staff]'. Below the input field is a 'Send' button. At the bottom of the panel, it displays 'Testing Webinar Polling', 'Webinar ID: 487-788-643', a red dot icon with the text 'This session is being recorded.', and the GoToWebinar logo.

File View Help

Questions

[Enter a question for staff]

Send

Testing Webinar Polling
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● This session is being recorded.

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Additional Resources

partnershipresourcesgroup.com/covid-19_resources

cvnl.org/covid-landing-page



Partnership Resources Group

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

Thanks for joining us!



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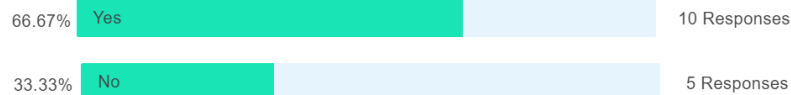
Elliot M. Levin
elliott@prgonline.net
415.485.6265

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

15 of 28 Attendees responded

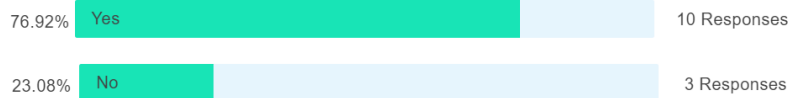
Multiple choice with single answer



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

13 of 28 Attendees responded

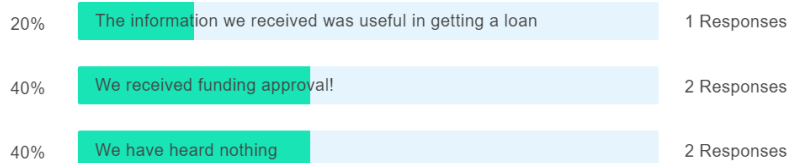
Multiple choice with single answer



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

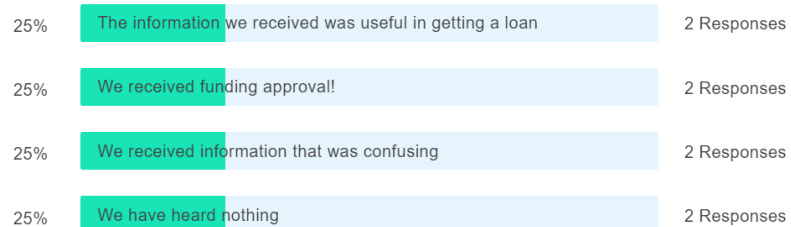
Multiple choice with single answer



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

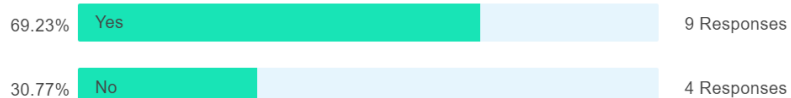
Multiple choice with single answer



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

13 of 28 Attendees responded

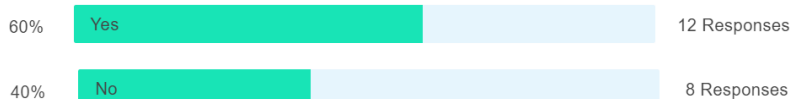
Multiple choice with single answer



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

20 of 30 Attendees responded

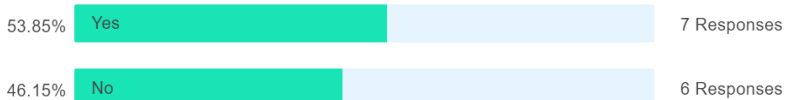
Multiple choice with single answer



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

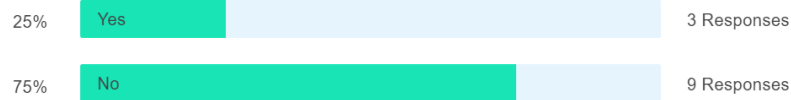
Multiple choice with single answer



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

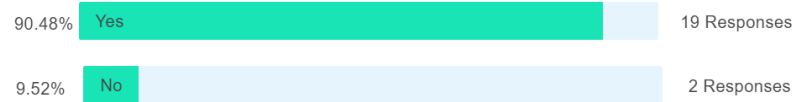
Multiple choice with single answer



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

21 of 30 Attendees responded

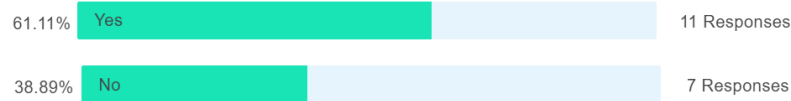
Multiple choice with single answer



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

18 of 28 Attendees responded

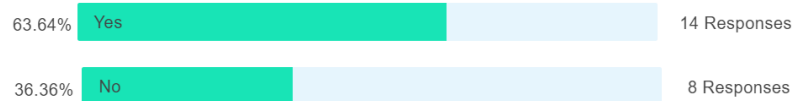
Multiple choice with single answer



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

22 of 30 Attendees responded

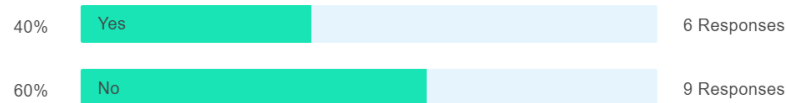
Multiple choice with single answer



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

15 of 28 Attendees responded

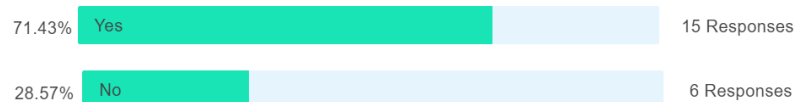
Multiple choice with single answer



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

21 of 30 Attendees responded

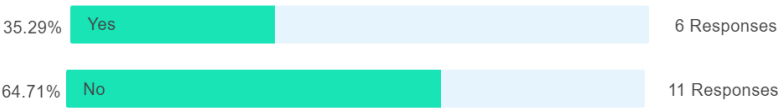
Multiple choice with single answer



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

17 of 28 Attendees responded

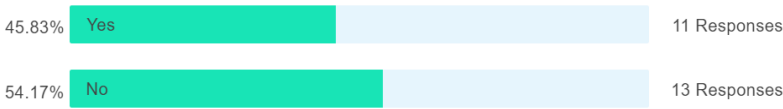
Multiple choice with single answer



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.