Stronger Together Webinar Series

Welcome! We'll be getting started in a few minutes.
Closing an Unforgettable 2020: Finding the Money

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Center for Volunteer & Nonprofit Leadership

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Partnership Resources Group

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

- Change your screenname, Add a Profile Pic, or join via video (everyone will be muted during the webinar, unless called on by the moderator by raising your hand)

- Provide non-verbal feedback throughout the webinar (open up the “Participants” tab in your dock)

- Type a public message or ask a private question (just toggle the “To” section in the Chat Box)
AGENDA

1. What’s Been On Your Minds
2. Virtual Events
3. Donor Conversations
4. Practical Tips for End-of-Year
YOUR PRE-SESSION FEEDBACK

(most frequently mentioned, N = 46)

- 60% of you have had direct conversations with donors.
- 50% of you have done or will be doing virtual events; 43% won’t come near them.
- Most of you are concerned about timing and donor fatigue from election, fires, the call for racial justice, and 6+ months of COVID.
- Consensus that the fundraising landscape has fundamentally shifted post-COVID – are we ready?

“Donors want assurance that their gifts are making a real difference in these times”
Virtual Events

- Trends and Practical Tips
- Voices from Colleagues on the Front Lines

Serena D’Arcy-Fisher
PRG Associate
I. Define Your Objectives

• Set Realistic *Expectations*
• Consider Staff *Time & ROI*
• *Engage significant stakeholders early*: donors, volunteers, sponsors

II. Choose Your Platform

• Research user-friendly *platforms and mobile apps*
• Sign-up and *attend other events* to evaluate their platforms
• Hire a *trusted tech pro* from the get-go. Good resource: [https://www.charitydynamics.com/](https://www.charitydynamics.com/)
III. Sponsors

- Virtual is new world for Sponsors
- Engage them early in the planning
- Be creative in recognition
- Offer them something special in the show
- Ask for outright donations

IV. Engage Your Audience

- Invite them early (lots of competition)
- Make it easy to register
- Provide help with tech issues
- Encourage fun!
- Mix pre-recorded and live
- Heartfelt mission-focused storied messaging
- Keep short, sweet and flowing
V. Fund-A-Need

• It’s *why* most attendees come!
• *Secure pre-event gifts* to ensure success
• Talented *emcee/host*
• Inspirational mission *video*
• Use *chat rooms* to build energy and inspire giving

VI. Auctions

• Weigh-up *ROI*
• *Limit* live items
• *Flexibility* for item redemption
• *Continue silent auction* after event
• Encourage auction *link sharing*
• Open *bidding in advance*
VII. Your Winning Team: Checklist

- **Event Captain** – key decision-maker
- **Host/MC** – the glue
- Recognizable, *on-camera leader*
- Pro *videographer*
- **Auctioneer**
- Social Media “*friends*”
- Chat Room *Hosts*
- **Tech Support**
- Q&A/Participation – *Input Manager*
SUMMARY

• Plan and rehearse!

• Be creative and on-point in 30-60 minutes

• Virtual events are here to stay – develop your skills!

• Incorporate into your annual campaign plan
Voices from the Front Lines:

- Patricia Gill
- Noelle Moss
- Miguel Ruelas
PRACTICAL TIPS AS WE CLOSE 2020 & PREPARE FOR 2021

I. Donor Conversations

II. Year-End Appeals

Elliot Levin, President
Partnership Resources Group
PRG Survey – May 2020:

88% of respondents said they’ve had direct conversations with donors and 26% of them have said donors will increase their donation.
DONOR CONVERSATIONS in the COVID ERA: The Basics

- Current donors are **10X more** likely to give
- **You don’t have to convince them** of your org’s value
- People are **giving to what they’ve given to before**
- You have **access more than ever before**
- Best practice: **3 “touches” for every ask**
- Even the **most reticent leaders can do it**
1. **Segment & Assign.** Matching is the key.

2. **Ask How They Are Doing.** True Discovery!

3. **Thank Them For Their Last Gift.** You’d better know!

4. **Tell Them How Clients Have Been Affected.** It’s not about your organization!

5. **Describe how your Agency has Responded.** Now, it is about you.

6. **Tell A Hero Story.** Staff, client or volunteer

7. **Describe Your Challenges.** Be authentic!
And a few general Tips….

- Remember, *this is not a solicitation* but be prepared to ask, if asked!

- Don’t be surprised to discover *Legacy Gifts*

- *Ask for their advice.* It’s a mark of respect

- Be ready to *suggest sustaining gifts*

- *Log the conversation!*
Voices from the Front Lines:

- Yvonne Roberts
- Marge Limbert
- Lisa Cannon
9 Strategic Considerations

- **Previous Bets Are Off** – It’s Not to Late to Plan
- **Treat It Like a Campaign.** A multi-step strategy, not a one-off
- **Timing? Hold Off Until There’s Less Noise.** Hah!
- **Let Giving Tuesday (Dec. 1) Give You Bounce.**
- **Build Internal Consensus on the Purpose**
- **Determine Your Audiences.** Is it everyone this year?
- **Write Your Case and Gather Client Stories – NOW!**
- **Know What Channels Your Tech System Can Handle & Provide**
- **Determine Your Offerings.** More is better this year!
7 Practical Tips

- Segment the audiences and their messages
- **Create the Campaign Calendar** – DM, emails, social media, text reminders
- Precede the appeal with a no-ask update
- **Change up the look!** Less copy, more images
- Leverage Social Ambassadors
- Put “You” in the Subject Line
Q&A Session:

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

*Time permitting we hope to respond to everyone’s inquiries*
Resource Pages

cvnl.org/covid-landing-page

partnershipresourcesgroup.com/covid-19_resources

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

Peer Learning Networks
Convened and facilitated virtually by CVNL staff members, these supportive networks of like-minded nonprofit professionals include guest speakers, facilitated conversations, networking, and other learning opportunities.

- Finance and HR
- Marketing & Communication
- Volunteer Services
- Fundraising

Learn more at cvnl.org/peer-learning-networks

Excellence in Leadership Program
Fall 2020 cohort just started – delivery entirely online! Pre-register for Spring 2021.

Dare to Lead™- begins 10/13
Based on Dr. Brené Brown’s research, led by Certified Facilitator Ana Estrada Daniels. Registration by invitation only (express interest).

Fearless Fundraising Online Bootcamp
Hosted by Mallory Erickson
WHEN: October 21, 9:00am-12:00pm
RSVP Today
Thanks for joining us!

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