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Don't Disconnect During Challenging Times

"As uncertainty about the coronavirus pandemic continued to rattle markets and our psyches, a group of America's foremost experts on giving and fundraising happened to be gathered for a regular board meeting of Giving USA – and ended up shaping recommendations for how all nonprofits can respond. Their main advice: Don't stop talking to big donors just because the world is being shaken. Past experience shows some donors never forgive the charities that don't reach out in times of need."

- Eden Stiffman, "What We Have Learned from Crisis and Can Use in Coronavirus Age" in **The Chronicle of Philanthropy**, March 17

As a participant at the Giving USA meeting, I can say it was a timely gathering to gain the insight of colleagues as the seriousness of this challenge became clearer.

There are bright spots – even after the Great Recession in 2008, when the market had dropped 40%, overall giving declined only 7% that year and 6.2% the next year.

Obviously, with that average many organizations were harder hit. We always encourage and guide our clients to be far above the average! Our team gathered their collective insight on how our clients and other respected nonprofits can rise to this fast-moving challenge.

Fundraising really is all about relationships — genuine relationships that you build with donors on behalf of those you serve.

Relationships are neither meaningful nor effective when you turn them on and off as you need them. They are about shared values and goals. You partner with donors to change the world – to change and save lives!

Times of uncertainty — and, yes, even crisis like now — are the times that you should lean into these relationships. This is the time to continue to deepen relationships and enhance communications.

Coronavirus has disrupted daily life for billions around the world. Americans are increasingly seeing dramatic changes in their daily lives – from transportation, to work, to travel, to shopping and dining and worship. No one in the nonprofit arena will be unaffected, from schools and museums being closed to food banks having dramatically increased needs and beyond.

Although circumstances are rapidly changing and no one knows how brief or how long this challenge will continue, this too will pass. In just a few months, life should be closer to normal. The economy will be recovering. Some people will be suffering, and some will have more than enough resources to get through challenging times and to help others. As in other challenging times, there will be silver linings.

Here are tips from our team to deepen relationships and maximize your fundraising potential:

- ▶ Keep a long-term perspective. People who have a long-term perspective — and don't base their decisions on the daily or weekly horizon — have far better outcomes. If you are in a campaign or preparing for one, keep moving and keep adjusting to the circumstances. This may mean a pause in asking but not a pause in cultivation, refining your case, research, budgeting, communications and more.
- ▶ Adapt to changes. For example, social distancing has led to the canceling of events. Many nonprofits rely too heavily on fundraising events. If your event is cancelled, develop alternatives to replace the income. Use this time to deepen relationships with those who might have attended the event. Whereas meeting in person is not a current option, make a phone or video call to connect with them.

Several of our clients have been in a "cultivation tour" mode. While we are paused on tours, we can be sure that volunteers and staff know which donors and prospective donors they should be reaching out to. They also should know the messages, questions and timing for this outreach. What a perfect time for them to reach out to these friends just to check in!

If tours are on hold beyond a month, then move to video tours. How can you bring your organization through video to the prospective donor? We don't mean a polished campaign video. We mean a video tour – even a live one – that shows you are genuine and making the best of challenging times. This first round or two should be select and very personal. To cast your net broader, utilize Facebook Live, LinkedIn or a video call platform.

- ▶ Get creative. Social media and emails can be especially useful right now. Record a few brief video clips that can be posted throughout the next couple of months. The first could be an update about any changes your nonprofit has made. Then, create videos customized for your nonprofit. For example, share a story about how gracious gifts helped change the lives of those you helped or give an update on a project.

▶ Every nonprofit CEO should have a presence. They should be a recognized voice and expert in the field and in the community or communities their organization serves. They should be visible. Part of that presence should be showcasing their leadership, personality, sincerity and knowledge. It should position them as experts and showcase how donors are making (and can make) a difference through your worthy organization.

▶ Communicate consistently. First, reach out to all your constituents and check in on them, let them know you are concerned and make them aware of any changes being made with your nonprofit – programs etc. For those closest to you, that should be a call or video call from your CEO or another senior staff member right away. Use the most personal medium possible. And then calendar outreach regularly over the next few months as you would or should be doing without a crisis.

I've been receiving a lot of emails from restaurants I patronize about this crisis – unfortunately more than from nonprofits I support. Today, I did receive two from nonprofits. One was alarming and left my stress level higher. It never referenced me or my support. The other led with concern about me and included a soft ask. It was far better received than the first.

▶ Remember your staff. Times like this are why operational reserves and endowment are important. Even if you have these, staff may be adjusting to working from home and social distancing. Have backup plans for all positions (cross training) in case a team member is not able to work for a period of time. Communicate with your staff in these times of uncertainty and be as transparent as possible.

▶ Invest any downtime in areas that will give you impact. Few of us plan enough. Take time to review plans, update them. Organize your office, organize your electronic files, review and purge emails. As uncertainty surrounds the next few months, planning is going to be key. Again, we don't know the timing of the recovery; however, we find that few organizations are truly ready for a campaign planning process. If you had one on the horizon, use this time to prepare so that when the recovery is underway you will be ready to take steps toward a major campaign.

▶ Ask! So, we have to communicate a little differently. We can't be face to face, but we can connect by phone or video call, email and recorded video. Be sensitive to and know your donors' circumstances. But, by all means don't stop asking. If you had planned to ask through an event or face to face, make another plan to do this in the near future. Donors want to make a difference! When you ask, place a priority on your major donors. Then, involve all your donors and prospective donors at the right time and segment them to make the appeal as personal as possible

Provide opportunities for your board and other volunteers to engage with their friends and raise funds in a variety of creative ways. Consider constituency campaigns, challenge gifts, tribute and memorial giving, planned giving and virtual fundraising campaigns. Use technology to have a virtual cocktail party, dinner or reception – engage the creativity of your former event hosts!

▶ Be grateful and have fun. This is a very serious situation on many levels. But don't ever lose the focus of being vigilant for every opportunity where you can show gratitude ... and yes, in this serious environment people will appreciate a positive (not Pollyanna) perspective and the ability to have some fun.

▶ Don't cancel meetings. I serve on a few national boards and we serve national, regional and local organizations. It is often not practical to travel to every meeting or event — even if you would like to. So, for many, video calls, phone calls (we encourage the power of video) and other creative options are the norm. This is the future, and the challenging times will bring us all more fully into that future.

▶ Build your community. After news of a board meeting being cancelled, a member responded offering to host a time just to connect on her Zoom account. People are social animals. We want to be worthwhile members of a worthwhile group. We like it when we – and our opinions – are sought by others. Think of opportunities to celebrate holidays, anniversaries, birthdays and more – for your donors, volunteers and staff.

▶ Learn their stories. This is a great time to build a library of stories from people you serve and from donors. No organization can have too many compelling stories of its life-changing and life-saving impact. Build your library. Reach out to interview staff, those who benefit from your services and others. Keep these brief – so you can easily incorporate them into communications and so staff and volunteers can learn them. Plus, gather stories from those who help make your mission possible – your donors. In your conversations with them, take time to be sure you know about their values, dreams, goals and what made them successful. Learn how they first became involved with you and why they continue to support you.

I just reached out to a friend who has served on many nonprofit boards. She is fine, but bored. She is capable of making significant gifts, even now. Again – reaching out to your donors and prospective donors would be appreciated. For those who support you, what a great time to learn more about their life, their story, how and why they got involved. Have you had the time to pay enough attention to this critical area? You may now!

▶ Continually monitor how things are going. As recent as last week, we were identifying seven-figure gifts in campaign planning studies. Now, we are postponing beginning interviews for new studies – we are preparing for studies through processes such as case development, prospective donor identification and research and more.

We still don't know what impact this will have on the economy – and on those you serve. Some of your donors may be impacted, but others who have savings, investments and retirement plans will be just fine and still able to make significant gifts if they understand the need and the role that they can play. Donors want to help, and they want to know that you are ready to give them the opportunity to do so and that you are a dedicated and impeccable steward of their investment. As clarity and a sense of the horizon increase, be ready to invite investment!



Jeff Jowdy
President
Lighthouse Counsel