



Fundraising in Unparalleled Times: Resources for Navigating Philanthropy during COVID-19

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Handout: Virtual Help Session

“What are the fundraising best practices for times like this?” Not surprisingly, recently, we’ve heard this question many times. Well, no one really knows until we get to the other side of this crisis.

Nevertheless, we do know the best practices that are fundamental to great advancement work. And, they will continue to remain so even during the most uncertain times. So, let’s revisit them, with a renewed commitment! We will most certainly study this season in years to come to understand practices that stood the test of the time. For now, past experiences navigating through crises help inform our work.

The 2008 great recession resulted in a downturn in giving for a time. Other disasters resulted in an uptick, especially to those organizations central to disaster relief. A Virtual Help Session held on March 31, 2020 addressed lessons learned from past crises and the special circumstances produced by the current pandemic, social distancing, distributed or remote work and the economic downturn. Our goal is to provide resources and guidance that will help optimize your fundraising program during this extraordinarily difficult time. A video recording of the March 31 virtual help session may be found on our website at visionphilanthropy.com. We hope you will visit it!

Recommendations for framing your work:

It is easy to become overwhelmed and paralyzed by the enormous amount of information; the change in work style to “distributed” work; the inability to connect with donors, prospects and colleagues personally face-to-face, combined with the great uncertainty of the time. Our work can be further confounded because we don’t know when the current circumstances will change or what the world will even look like afterwards. Below are a few suggestions for framing and keeping your work moving forward.

Frame your work and actions by the following:

- **What must we do right now?**
 1. Conduct a deep dive of your portfolio and the team’s portfolios.
 2. Analyze of those people, households and organizations that are top priority for outreach by select members of your institution, or for small group outreach.

3. Create an action plan for consistent and timely outreach.
 4. Revise metrics and adapt for today's environment. It is important that measurables remain in place.
 5. Remember, "Connection is Protection". I heard this recently in the context of human behavior and social connection. It stands to bear that connection is protection for your organization's mission and vision. The philanthropy program offers ways to connect with constituents in meaningful and mission driven ways.
- **What must we do next?**
 1. The new ways of working and conducting business have changed vastly. These changes are undoubtedly with us at least for the next 12 months, and indeed they may forever change the way we work. We must analyze and understand the implications for philanthropy and for the way we conduct the fundraising program.
 2. Review your strategic fundraising plans and adapt accordingly.
 3. Revisit goals with your colleagues, the CFO and President. Create institution-wide understanding and buy-in. Make sure the full team is on-board and understands how we are moving forward together!
 4. Continue to build community, a new community, with your greatest stakeholders. Make sure they are contributing ideas and that together you are aligned.
 5. Create ways for on-going interaction with your institutional leadership.
 - **What must we plan for the future?**
 1. Remember this is a very important planning time as you continue to lay the foundation for forward momentum.
 2. With your institutional team, explore what the new normal will look like for your organization, the implications for philanthropy and how you can be ready!
 3. One thing you can count on, the world will not be the same after this time. It is time to be proactive!

What are the Fundraising Principles that Will Remain Constant and What Will Change?

It is helpful to remind yourself that not everything is changing, there are many fundraising principles that remain unchanged and should continue to be central to your work:

- **Leadership:** Manage your leaders' outreach to the top donors, orchestrating the right calls, letters, outreach and convening small groups with key leaders
- **Relationship Building:** This is a time to deepen meaningful relationships through transparent conversations
- **Stewardship:** Always lead with stewardship

- **Clear and Concise Messaging and Communication:** This is needed more than ever as you represent your mission and vision even during uncertain times.
- **Sensitivity to Your Donors and Constituents:** Using “Pre-solicitation conversations” where proposals are moving forward is more important than ever.
- **Gratitude and Hope:** Opportunities to provide expressions of gratitude to your donors, and likewise from donors to your staff. Moments of inspiration that provide hope during challenging times.
- **Flexibility:** being able to pivot. The need for unrestricted funds may be greater than ever. Be ready to describe the need to pivot even more so to unrestricted gifts (if this is the case) and the business practices and decisions the institution is taking to address the changes required of the times.
- **Exercise: Work with your team to develop your own list. Post it where everyone can see it and keep these central to your work!**

Lessons Learned: Navigating through Past Crises

Bob Wilkens, VPG Senior Consultant, lead Memorial Sloan Kettering Cancer Center’s fundraising program during 9/11 attacks and subsequent anthrax attacks. Their response and lessons learned included:

- **Direct Mail Campaign**
 1. Restructured mail campaign in October following 9/11 to avoid being “tone deaf”. Continued an aggressive mail schedule.
 2. Addressed the crisis but talked about mission and still asked for support.
 3. Learned that donors and constituents were concerned that the institution’s programs would go on. Addressed this in their appeals.
 4. Direct Mail program regained its momentum and returned to the same level as previous giving by the end of the year.
- **Communications**
 1. Shifted all messages and communications in response to the current situation. MSK provided clarity around their operations and the impact of the terrorist attacks on the institution.
 2. Immediately called major donors personally to inform and connect. Most importantly, asked how they were doing during this time.
 3. Did not ask for gifts during these calls.
 4. Recognized that direct and transparent communication can ease the minds of donors who want to ensure the things they care most about will continue.
- **Team Building**
 1. As a leadership group and team, they focused on the health and well-being of their team, and pulled together. In the case of MSK, they provided counseling and team-building lunches when people were able to return to work.
 2. MSK focused on providing the support to each other: Insight for this time: This is a time to plan for the future as well as conducting virtual conversations about value and gratitude with staff, revisiting and reaffirming the commitment to each other.

Lessons Learned: Impact on Philanthropy in Past Crises

Individual Giving:

Individual giving tends to be more volatile and susceptible to stock market changes, but several things have held true over various times of crises:

- Research has shown that the day to day variation in the stock market doesn't predict changes in household giving year over year. Rather, it is the long-term economic trends that matter more so. Research demonstrates that giving has been tied more to year-end to year-end stock market.
- A Study by the Philanthropy Panel from the Lilly Family School of Philanthropy demonstrated that while the percentage of households who gave declined during the Great Recession, households that tended to give consistently, gave consistently during economic crises. Make sure you are connecting with your most loyal donors and friends, keeping them informed and letting them know how they can help. [Lilly Family School of Philanthropy](#), current philanthropy research from Indiana University.
 - *Remember the principles of stewardship as you are reaching out to this group!*
- **Different channels of giving is typically employed by high net worth individuals during crisis times:** Research also shows that high net worth individuals may change giving from stock assets to giving more aggressively out of income or other assets and from different channels and assets. In other words, **don't** count them out!
- **We now have a new opportunity: Donor Advised Funds, which have increased substantially in recent years.** This provides a vehicle and opportunity for current donors who have already given those funds but likely have unallocated funds. (See below)

Foundations:

Many foundations have pivoted during times of crisis to address the needs of their community or even more broadly nationally. Many even increased grant making to address the enormous challenges. To fully understand what opportunities are available, speak to your Foundation partners and step up your research and outreach to others to learn of what programs they may roll out. With that knowledge, you will be prepared to jump on those opportunities as they become available.

- Have conversations with foundation officers closest to you is one of the most important things you can be doing now.
- Involve others in your institution in these conversations as appropriate, including your institutional and board leadership.

Corporations:

Giving by corporations were linked to industry type and varied greatly depending upon the sector. In this time, corporations will be much more tricky due to the enormity of the economic crisis. Again, reach out to those that are closest to you to take their pulse and get

their advice. At the very least, share your concerns, the state of your institution and maintain the relationship.

Opportunities and Best Practices for this Time:

- Absolutely, continue your fundraising program in the most humble, authentic and donor-centric outreach that first preserves the relationship. Pivot where appropriate, honing your message and **most of all**, be sensitive to your donors' circumstances, fears and uncertainty. This is a time we need to all "be there" for each other while making sure our institutions are secure!
- Special Reminders:
 - **Relationship building: Identify and establish action plans to reach out to major donors. It is especially important to connect with some of your friends during this time of isolation.** This is a window in time to be connecting especially with older donors and stakeholders, alumni, patients or constituents. Another study found that charitable subsectors were effected differently during economic downturns. **The number of million gifts actually increased to human services and gifts to public benefit during periods of recession.**
 - One of the most important lessons that we've learned: don't make assumptions, talk frankly and transparently with donors, prospects and constituents closest to you about their intentions and giving to your organization.
 - **Donor Advised Funds: Make sure your messages and appeals include gifts from DAFs. These are funds your donors have already relinquished. Although the donor may choose to wait for the assets to return, it is a great vehicle to speed up giving to your organization.**
 - **Universal tax deduction in the Cares package.** Includes a provision for all taxpayers to deduct up to \$300 whether they take the charitable tax deduction or not.
 - Other from **CARES Act:** Delays IRA required minimum distributions in 2020 for an additional year. Remember, under the SECURE Act, for distributions required to be made after 12/31/19, the age was changed from 70-1/2 to age 72. We do not provide financial advice to individuals! Donors should consult with their financial advisor. But, keep in mind that charitable distributions from an IRA may still provide an option for some donors eager to find charitable solutions. Please advise them to consult with their advisor for the most meaningful tax solution!
 - **Foundation funding pivots.** Potential huge opportunities here. Make sure you are reaching out!
 - Virtually convene your board, development committee to provide real-time updates. Provide simple, but specific and actionable items for partnering together to move the philanthropy program forward. This is a time to revisit and rebuild their "Signature Language" (values, gratitude and mission). It is an activity that can help re-center and reaffirm your Board and volunteers during uncertain times.

- **Large pledge payments delayed?** When the time is appropriate, reach out to the donor. Each circumstance will vary, but these are the donors with whom you hopefully have your closest relationships. Begin with offering condolences on the impact on them or their business. Discuss options with sensitivity. Remember, they will be with you for the long-term, so keep this in mind. We found this to be especially true when working with loyal donors who had lost significant wealth with Madoff. Our sensitivity was appreciated and remembered later.
- **Be sensitive to multi-year commitments:** Many donors will be unwilling to commit to multi-year pledges. This is sensitive. Focus on basic needs. Be ready and flexible to pivot. This is the time many may be pivoting from campaign programs to more operating support. Perhaps reallocating gifts for a period of time that is going to be most important to the organization.
- One of the take aways for the future: **remember, the habit of giving is very important. Make sure you are instilling this for the future.**
- **Psychology tells us that we all have a strong drive for social connection.** This drive especially has an impact on giving now. People want to help, stay mission driven and connected. Recommended reading: [Social](#), book by Dr. Matthew Leiberan.
- **Practice your “Signature Language” (what you value, are grateful for, your institution’s mission)** with colleagues, through virtual means, before reaching out to your donors! **Remember to practice active and deep listening.**

Forming new alliances and partnerships: A Special Opportunity

Evaluate what you should seize now: internally and externally.

- Remember to reach out to your colleagues in marketing and communications, and strategic planning leaders.
- They are likely producing content that can and should be multi-purposed. And, they are likely looking for partners during this time.
- **Where are your mutual wins?**

Distributed (Remote) Work: thoughts and resources

The entire world is coming up with creative ways to work from home, communicate with donors, and continue serving constituents. We recommend the following resources:

- Peter Attia’s podcast, “The Drive”, with Ryan Holiday, “Finding Stillness Amidst Chaos”, including lessons from the life of Winston Churchill
- [Ten Percent Happier](#) podcast by Dan Harris, Ep. 232 “How to Actually Get Work Done at Home”
- Sam Harris “Making Sense” podcast, #194, “[The New Future of Work, A Conversation with Matt Mullenweg](#)”. (Highly recommended!)
- [Running Masterful Virtual Meetings](#) post by Leadership Strategies

- [Working home from is awesome. Here's how to excel at it.](#) Article from L.A. Times
- [CoviCore](#), online giving campaign platform
- [Broadcast Med](#), digital broadcasting platform for healthcare organizations
- [Slack](#), co-working tool with colleagues to enhance your collaboration
- [Microsoft Teams](#), co-working platform by Microsoft
- [Two Things Killing Your Ability To Focus](#), another working at home resource.

Taking care of yourself and your family: resources

Our world has turned upside down. Social connections are interrupted. The end of the pandemic is unknown. Economic volatility seems to be here with us for a while. But, we know that this too shall end and we can come out on the other side even stronger together. The following are resources we've found helpful in this moment:

- Dan Harris: 10 percent Happier podcasts and Coronavirus [Sanity Guide](#). Also, daily live YouTube talks and meditations (3 p.m. ET) to navigate the time. Sign up through the website. Will send reminders for daily talks, emails and meditations
- Dr. Laurie Santos: [The Happiness Lab](#) podcasts: Helping through the Coronavirus. Dr Santos is a Yale professor who teaches one of Yale University's most popular courses on happiness. Dr. Santos' podcasts also have relevance for philanthropy and giving.

About [Vision Philanthropy Group](#)

VPG is a full service philanthropic consulting firm specializing in major and transformational gifts, culture of philanthropy, comprehensive, capital and endowment campaigns, and education, training and coaching in major gift philanthropy through our Bold Asking® program. The training program is designed for boards, institutional leaders and philanthropy staff. We have adapted the program to answer the unique requirements of this crisis and to provide the support and training needed by staff, leaders and boards.

We invite you will reach out to us to discuss how we can partner with you through this time. In the meantime, best wishes in your noble pursuits and for continued good health!