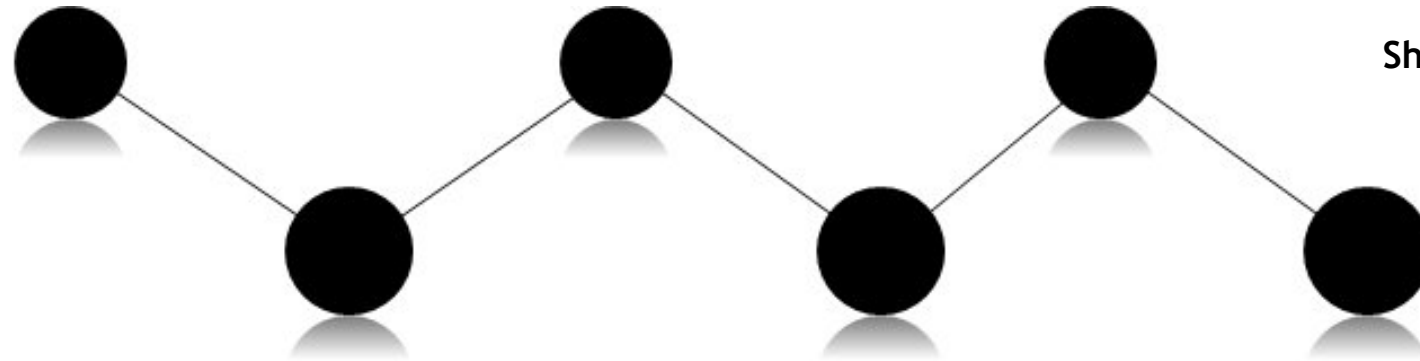
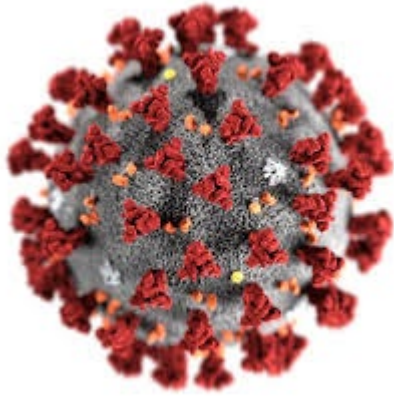


Fundraising in the Time of COVID-19



Presented by:

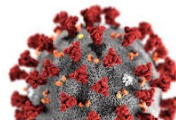
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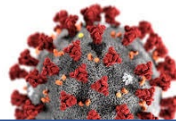
Today's Meeting

1. All participants will remain in Mute Mode until the end of each slide.
2. Once each slide each is completed, you will have the chance to ask a question by using either the Chat function or the Raise Hand function. If you use Raise Hand, then you will be unmuted to interact.
3. Chat will be recorded to make it possible for us to follow up with unanswered questions. Also, please feel free to send unanswered questions to the presenters via email.



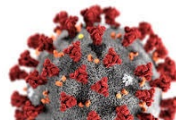
Staff Management

1. Staff meetings will need to be held by video conference or conference call. And if your institution's firewall security does not allow for this, get the IT people to change it and get you a webcam if needed. Check to see if your computer needs to be enabled for VPN access.
2. New protocol for meetings includes sensitivity to home situations including family members present and potential ongoing family responsibilities.
3. Gift officer metrics need to be adjusted with emphasis on donor and prospect contacts vs. fundraising performance. However, keep emphasis around meeting individual and institutional goals as much as possible.
4. Maintain morale in creative ways.



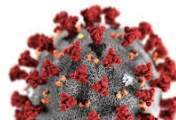
Board Management

1. Board engagement: Continue to work closely with institutional leadership to keep board members engaged during this challenging time.
2. Continue to hold board and committee meetings remotely if members are willing. If a board member does not know how to do video conferencing or does not have a webcam, get one for them and teach them how to communicate this way.
3. Support board members in their efforts to fundraise and communicate with the institution as much as possible.
4. Keep them in the loop with all communications to stakeholders.



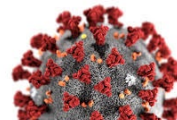
Major Gift Campaigns and Initiatives

1. Will need to adjust fundraising timelines and milestones, just like after 9/11.
2. Inform leadership of strategy changes.
3. Inform leadership of anticipated cashflow changes.
4. Emphasize fundraising from foundations, including COVID-19 related initiatives.
5. Keep in touch with your donors.



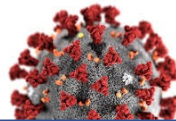
Donor Meetings

1. Great time to reach donors by phone. They are likely home.
2. Keep setting up appointments with your donors.
3. Continue to engage, cultivate, solicit and steward your donors.
4. Handshakes are out. Elbow bump and hands-together bow will soon be the norm even after the pandemic.
5. Air travel to see donors. Bad idea.
6. Don't assume high capacity donors are feeling the pinch.



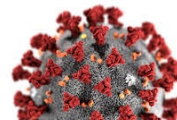
Annual Giving—Broad Considerations

1. Stay the course! Organizations that cut back appealing to donors in past crises (e.g., post-9/11) have more often done worse than those that continued to appeal.
2. Stay with your control (standard) approach and avoid risky testing. Not the time to launch a new acquisition package. Even successful test outcomes may not be valid in a “new normal” future.
3. Be authentic. Talk about your mission and core values—that what your donors support and what they expect! (And if you have a direct connection to the crisis, stress it!)
4. Express your concern for your constituents’ health in your copy, so your donors know you care.
5. Review/Rework copy to make sure it won’t seem inappropriate or out of touch.



Annual Giving—Digging into Details

6. Review Automated Messaging! Make sure your automated “thank you” emails and your inbound voicemail messages are appropriate to these times.
7. Be sensitive to donors’ economic concerns. Consider lower “ask” amounts, negotiate a “pause” if monthly donors call to cancel, and have a plan to answer economic concerns.
8. Capitalize on good will for relevant organizations such as health care and biomedical research institutions. Donor gratitude will be strong and will come through.
9. Mail smarter. Tighten your audience to the most responsive donors for best ROI. But also try to re-engage lapsed donors: your “now more than ever” appeal will resonate even more.

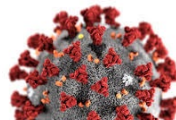


#GivingTuesday is BACK!

The folks who bring you #GivingTuesday every November have organized [#GivingTuesdayNow](#)

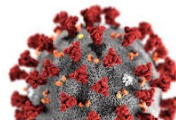
This global day of giving and unity is set for Tuesday May 5, 2020 and your strategies might include:

- Use a multichannel approach - website, embedded video, customized banners, email
- Use Social Media - fundraisers Facebook/Instagram!
- Use Direct Mail - send a postcard or even a mail appeal with a link to your #GivingTuesdayNow URL
- Use a matching gift offer - people are three times (3X) more likely to donate with a match
- Use a reminder - Send a calendar invite for May 5th to all of your contacts!



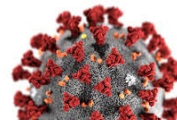
Fundraising Events

1. Galas - Do a non-event via mail or email with a nice invitation and a request for a contribution so your would-be attendee can remain healthy and safe and they can continue to support your mission.
2. Donor recognition events - Create a video about the honoree and send everyone a link to it (perhaps through the nice gala invitation above) with language that you are thinking of the health and wellbeing of our stakeholders.
3. Consider holding a full-blown virtual event employing a firm that specializes in this.



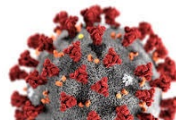
Donor Communication & Stewardship

1. Reminders of service and event cancellations is a good touch opportunity.
2. Centralize communications with consistent messaging and have a comprehensive communications plan that includes advancement.
3. Communicate your organization's opportunities and challenges to donors, and how you are considering staff and constituents.
4. Do brief weekly updates. Determine the best channels for your best donors. (e-newsletters, personal messages, web, text, etc.)



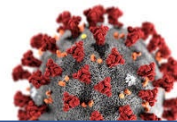
Update Operating and Communication Plans

1. Adjust your short term (3 months) tactical plan.
2. Reconsider your annual outcome objectives and annual fundraising goals by method.
3. Monitor and adjust annual operating budget quarterly.
4. Explore collaborating with other organizations for economy of scale, shared resources and joint requests to donors.
5. Be flexible and decisive. The fluidity of the circumstances requires that you continuously reassess the situation. Make your decisions based on the best information you have at the time, without second-guessing.



After the Crisis

1. The long-term question is how much of this change will or should remain the norm after the pandemic passes?
2. Find the silver lining and plan for the new normal.



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See this link for comprehensive and continually updated strategies:

<https://www.copleyraff.com/home-page/covid-19-fundraising-response/>

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