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Fundraising in this Quickly Changing Reality
Or, How to Keep Calm & Pivot
Or, Stick to the Basics but in Novel Ways
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Back in March, 2020 I wrote that “we are facing a new reality in terms of many areas of school management,” including your fundraising efforts. It appears that it would not be as temporary as many of us hoped it would be, but may now be the “new reality”.

However it develops, some things do not change; relationships and face-to-face meetings as the leading factors to long-term success in fundraising. And a good rule of thumb has always been to first meet with a donor on neutral ground (restaurant, coffee house, etc.) or on their turf (home, office, etc.), then bring them to your campus (school tours, events, etc.)

But now we are in a world where there may be concern with personal visits. Even with proper social distancing, many of your donors and prospects may not be comfortable with restaurants for lunch, coffee house visits, school tours with students, or even have an office to meet in. Zoom has probably landed a permanent piece of our future “hybrid” offerings, blending in-person with a Zoom option for those concerned. And perhaps, even as meeting options loosen, the traditional “flu season” may have a very similar look to COVID 2020.

Besides Zoom, where does that leave us? As one post noted, and I will use it as our rallying cry, “Keep Calm & Pivot on.” Stated in another way, *stick to the basics but in novel ways*.



Below are some general discussion points and things to consider that are as true now as they were in March, and are proving to provide ways for schools and churches to continue to engage donors and solicit the needed support to survive and thrive. So, we continue to encourage you to focus on specific ideas for our schools and associated churches to stay calm, keep the basics of donor relations in mind, but look at new and different ways to keep moving forward.*

Below are general and specific areas to consider, as well as a section near the end focused only on Events/Auctions.

But if you are in a hurry, below is the document summed in 5 main points:

1. People don't give unless they are asked. (You miss 100% of the shots you don't try, Wayne Gretzky.)
2. Keep moving forward. It is better to be imperfect and try something than to do nothing or cut what you are doing.
3. People are naturally inclined to give. It's American. It's Christian. It's human. Give people a reason to give.
4. Keep Calm and Pivot.
5. Stick to the basics but consider novel approaches, solicit new ideas, consider ways to blend the old and new delivery methods.

GENERAL DISCUSSION

1. First of all, Let's start with What Happened Last Time: while today is different in several ways, we can learn from stories and research from other economic downturns that can give us at least a guestimate of what can happen, as well as from those early adopters that didn't wait when COVID first hit.
2. COVID-19 is not the first threat the nonprofit sector has encountered. There are 3 or 4 notable economic downturns in recent memory:
 - a. Dot-Com bust in the 1990s
 - b. Y2K in 2000.
 - c. 9/11
 - d. 2007-2009 real estate bubble and Great Recession

Research and results we found of note are the following *with basic tenets related afterward*:

- e. Giving tends to lag changes in economic conditions: that is, donors still supported charities at similar levels, even up to 12 months after the start of the downturn. *Don't stop asking.*
 - f. Per Penelope Burk, research shows that donors continue to support not-for-profits that they trust and they find it much easier to drop those that they don't. *Continue to build that trust.*
 - g. Existing donors remained loyal: your donors loved you enough to support scholarships and endowments and operations last year, last month, maybe last week, and they will still continue to love you today and tomorrow. *Keep communicating with them.*
 - h. Fortune favors the prepared: *start now and engage your constituencies across multiple channels.*
 - i. Most reports note that organizations who've gone to their donors in crisis see better than expected results. Donors want to help a cause they care about at a time when their help is especially needed. *You, therefore, need to ask.*
 - j. Even during the Great Depression (past most of our memories) when the economy took a hit, people still gave at a relatively consistent rate. They may have stopped some of giving to lower-tiered organizations, but they stuck with the groups where they had a long-standing or beneficial relationship. *Give them a reason to give.*
3. Next, Avoid some of the usual mistakes that organizations tend to default to in times of trouble:

- a. Don't cut fundraising and marketing budgets. One post explained it best with the analogy: "We have to drive across the country. So we are not going to put any more gas in the tank." It doesn't work.
 - i. If your non-profit loses some donors or some big gifts during this time, you will need your fundraising program to nimbly respond by working to find new donors and new revenue streams
 - ii. You need to keep raising funds in order to carry out your mission and programs.
 - iii. You need to cultivate and communicate with donors.
 - iv. Stick as closely as you can to your current fundraising plan.
 - v. And don't cut the size of your fundraising team.
 - vi. Don't cut your donor acquisition efforts until it's clear they're really not working. Organizations who slow new donor acquisition efforts will struggle much more and for years longer than those who keep acquisition going. History shows that securing the future requires investing now.
 - b. Avoid negative attitudes. Being realistic is different than being negative.
 - c. Don't apologize for asking.
 - d. Don't stop your efforts.
 - i. Some donors will circle the wagons and stop all activities and communications, but most don't shut down. They care very much about the financial well-being of your organization.
 - ii. We wouldn't be surprised if some of your most loyal donors contact you first and ask what they can do to help during this difficult time in the next couple of weeks. In fact, some groups are reporting an increase in donors asking, "what can we do to help?" Be ready to answer those questions.
4. Fight Assumptions about your donors: to paraphrase Wayne Gretzky, you are guaranteed zero revenue for requests you never make:
- a. Don't try and think for your donors.
 - b. Don't assume donors won't give.
 - c. Donors have continued to give and will continue to do so.
5. Keep Communicating with Your Donors: This isn't the right time to go silent on your donors or feel sheepish about sending out things like donor newsletters

and other communications right now. It's important to keep communicating with your donors.

- a. If you stop now, it will be hard to restart when the crisis passes... if your donors don't hear from you for a few months, chances are, you'll lose them.
 - b. Your donors are a key part of your team...contact during this difficult time reinforces that fact and helps to build your relationship with them further. Plus, if they're stuck inside their house, they may welcome having something extra to read from an organization they care about.
 - c. Be Sensitive with Your Messaging and Your Donors
 - i. Many donors are still anxious right now, and some of them may be dealing with relatives or friends who are ill. Your donors may also be dealing with financial stress caused by the economic impact of COVID.
 - ii. But being sensitive does *not* mean that you shouldn't be making asks.
 - iii. Be patient, be sensitive, but continue asking.
6. Stay the Course, but with a Current Focus: All the usual proven methods of fundraising still work:
- a. Be honest.
 - i. Believe it or not, they're likely worried about your situation too.
 - ii. Mention the effect of the pandemic on your finances and fundraising, and remind your donors that your work must continue.
 - iii. Even if you have no direct connection with COVID, silence may not be golden here. It is all folks are thinking about right now.
 - b. Build trust.
 - i. Acknowledging that donors, not just not-for-profits, are negatively affected in a crisis.
 - ii. Offering sincere, personal gratitude whenever donors give.
 - iii. Facilitating direct contact from the people in your organization that have influence with donors.
 - c. Be thankful.
 - d. Show the donor impact.
 - i. Your donor still wants to be the hero.
 - ii. Share stories, videos, etc.; what is happening at your organization now.
 - iii. Give "shout-outs" to your sponsors, foundation donors, vendors, etc.

- iv. Thank your staff as well... they are doing amazing things!
 - e. As one post noted, "Be understanding, polite, and pleasantly persistent."
 - f. It's not just your clients and staff who need you now; your volunteers need you too.
 - g. Stay connected with your board; as one person noted, "Social Distancing" does not mean "Leadership Inactivity".
- 7. But... this is a perfect time to try something new: As stated before, our options with meeting donors in person are severely hampered by opportunity and social distancing (it is hard to look someone in the eyes when they are 6+ feet away from you!) So:
 - a. Be creative
 - b. Have you been wanting to try a different email appeal or start a newsletter? Why not now?
 - c. Be creative.
 - d. Be creative.

SPECIFIC ACTIVITIES

8. You better check any already-scheduled or planned communications; that fundraising copy you'd already prepared to send out in April just may not sit right with folks today. Some groups schedule posts a day or week or month in advance.
9. This is a great time to make donor thank you phone calls: if you can't see them, talk to them!
 - a. Leading donor researcher Penelope Burk illustrates how a simple thank-you call can boost fundraising well-beyond expectations.
 - b. Get our SGO donor list from Go.SGO and contact your donors over the last twelve months. Or those that supported your last capital campaign. Or those that have given to your endowment for the last 5 years.
 - c. Don't ask for money. Just show your gratitude and give them the opportunity to ask how things are going.
 - d. If you get their voicemail, leave a similar message. As one person noted, "Gratitude overcomes fear. Because gratitude rekindles hope."
 - e. Isolated lonely donors may welcome phone calls.
 - f. This is also a great time to contact board and committee members and ask them to make some calls, too.
10. Hand-write letters to donors: The Lutheran SGO of Indiana harps on the importance of writing thank-you notes to donors, so:
 - a. Dedicate 15 minutes a day, starting with your most recent donors then moving out, and drop them a note.
 - b. After about the 4th letter, you will get re-accustomed cursive writing again.
 - c. But don't lick envelopes closed. Use a wet paper towel. (yes, I saw that posted somewhere.)
11. Consider a mass mailing appeal:
 - a. Use a mailing house to print and stuff and mail. You can't gather volunteers together now and it will actually cost less in many ways.
 - b. Provide an update on what is going on with your school.
 - c. Be honest. Share what your teachers are having to do in this new teaching environment. Illustrate how you miss Chapel. Explain that you are now running home-based education, not closed as the media states.

- d. Tell stories. Send a picture of a teacher engaged in online instruction. Show a child waving back from a Zoom screen. Ask parents to share videos of their children engaged in activities promoted by your school.
 - e. although you should definitely keep an eye on the news; if snail mail becomes the next worry...
12. ... Emails!: Email is the only digital channel where you own the data, and therefore the relationship. Studies show that each usable email address on your list is worth \$14.90 in annual revenue. And email is safe both for social-distancing needs and for working from home.
- a. If you already have a robust [online fundraising program](#), keep it up...
 - b. if you don't currently do much fundraising online, now might be a great time to start.
13. Hmmm... Social Media: This is hard one for me; in a past Monday Morning Musing post, I noted that expert research states (at least it did in early March) that social media should not be considered a strong contender for fundraising success (at best social media helps with awareness and moving people somewhere else for action.)
- a. But now, social media may be a growing way to communicate with your donors.
 - b. There is talk about a second wave?!
14. Crowdfunding: Watch a few Youtube videos and online forums to see if this fundraising method could work for you.
- a. Tom Ahern told me once that the average GoFundMe or Kickstarter raises \$6,000; so don't expect the Bucket Challenge, but who knows?
 - b. I do know that it takes lots of volunteers and "influencers" (people with lots of followers) willing to share the effort to get it kickstarted (pun intended.)
15. Go all-in and Multi-Channel: research illustrates how utilizing direct mail, email, websites, and social media together can raise your responses rates well above what each effort could do separately.
- a. Send mail, then send a matching email the next week and share on Facebook and send them to your website for the full story.
 - b. Facebook users are experiencing massive challenges as it relies ever more heavily on algorithms for moderation... diversification is key.

- c. Regarding social media, keep in mind that “digital” is not synonymous with Facebook only! Twitter, Instagram, LinkedIn, and others are out there.
- 16. Giving by Text, Anyone? Can’t hurt to try. The gifts in general will be smaller, but they will still be gifts.
- 17. You’ve been thinking about a Wills/Estate Plan System: This is a great time to remind donors about gifts in their Wills. And reports show people are contacting their attorneys in recent weeks... they want to know everything is how they want it to be, should anything happen. We have samples to consider.
- 18. Take Advantage of Online Fundraising Training: If you or your team have some extra time in your schedule right now, it could be a great time to take advantage of fundraising training opportunities that will supercharge your development program.
- 19. Maybe revisit your Fundraising Plan and Case for Support: now is an excellent time to
 - a. Write or update your fundraising plans
 - b. When is the last time you read your Case
 - c. Reaffirm your Vision, Mission, and Core Values
 - d. LT strategic vision

AUCTION/GALAS/EVENTS

20. Your Auction may be the main avenue you planned to raise your endowment challenge match, or perhaps it is a huge component of your budget. Your committee needs to make some hard decisions.

- a. Contact those involved; This is your chance to convert event attendees to mission-based attendees, from ticket-buyers to actual donors.
- b. Now, more than ever, it is important to connect, reconnect, and engage even more deeply – everyone. That means all your sponsors, event attendees and auction buyers.
- c. Use this opportunity to talk more about your work, and less about the event itself.
- d. Make sure if your event is cancelled or postponed or changed in any way that you have stopped or updated any scheduled mailings or email updates.
- e. Maybe make a video and share it via Youtube to give everyone an update on your plans.

21. Is it canceled? I have a sample appeal letter from a school that opted for a mailed appeal instead of running an auction a few years back. The letter raised close to what the auction would have provided (after removing costs and staff time) without having to spend 6 months planning an event. Donors will understand if you change things now.

- a. Ask people to donate the cost of their ticket. When you let everyone know that the event is cancelled, offer everyone an opportunity to make the cost of their ticket a contribution to your work.
- b. If you already had sponsors lined up for your event, ask them if they will turn their sponsorship from an event sponsorship into a website sponsorship or other type of corporate sponsorship of your work. Create some marketing packages and present them to your sponsors to give them options for continuing their support.
- c. Cite real numbers about your operating budget. It's ok to share these numbers with your event ticket buyers and helps you talk about impact. You can reveal how much your auction or event makes each year – and how important this contribution is to your operating budget. It might be the first time an event attendee ever heard this type of information about what you do.
- d. Be transparent and honest about the situation. When you write your donors – again, it's ok to be totally transparent. When you are this open

and honest, and cite real numbers, it enhances your credibility. You build trust with your donor or event attendee. Share specifically what you do with the money. Try to be specific about a program or project that the event helps to fund. This type of specific information can help open a donor's heart and incline them to contribute.

22. Or, has it been postponed and moved to another season?

- a. Plan a mailed appeal during the original date. Donors will understand and it helps spread the word of the new date/time.
- b. And discuss with the committee if you will keep the new date of the event in the fall for 2021 or plan to do another effort again in the spring as Gala 2.0 or Gala Lite.

23. Considering moving your auction online? It can work, but

- a. you will probably want an auction software to help you. We have some suggested vendors, and some are providing discounts this Spring.
- b. But remember, the best return on investment during your gala is usually the live auction and the paddle raise/fund a need, and those don't transfer well online.
- c. If you already had auction items lined up, why not run an online silent auction as a fun (and profitable) way to stay connected with your donors? You may have 100+ gift cards, auction baskets, and trips to Florida (yikes!) sitting in your front office.
- d. You could also contact the donors of the auction items, especially experiences, and ask if you can use them next year/extend its expiration date.

24. Virtual Events: consider it a mix of online silent auction with live people on a stage in front of... no one.

- a. Need the tech/software/landing page to make it successful.
- b. Having your donors together via an online platform to hear from your executive director and see a short video of your work is a good idea.
- c. Get everyone virtually together at the same time.
- d. Livestream from Facebook, YouTube, etc.
- e. Live auction is a bit different... and auctioneers look perplexed.
- f. Fund a Need/Paddle raise is a bit different...
- g. Mix in videos of teachers, students, programs, etc.
- h. If you are the first to do this in your neighborhood, the novelty alone could make it successful.

- i. Not a bad option if you don't want to postpone or move your event (see above).
25. I once helped an organization do a "No event-event": support our event by not coming to an event. Stay safe and support scholarships. It was tongue-in-cheek, but it can work.
26. Blended Events: This may be the new reality. As people emerge from their bunkers and embrace the options to gather as Christians again, others are either not ready or do not consider it safe yet. By offering a combination of above ideas, such as virtual viewing and online auctions combined with in-person events, you get the best of both worlds, or at the very least give the decision to the attendee on how they are comfortable with supporting your organization. And we do think this, to borrow from *The Mandalorian*, Will Be the Way for the future.

Please know that I am praying for you all daily and I'm here to help. Feel free to suggest ideas and share drafts.

**Many thanks to the schools and churches that have followed some or all of these suggestions as we encouraged them along, and to the collective experience of leading fundraising practitioners and researchers, including Penelope Burk, the late Jerry Panas, the IU Lilly Family School of Philanthropy, Bloomerang, Claire Axelrod, CCS Fundraising, and others.*