



Fundraising Strategies Going Forward

Angela Seaworth, Ph.D., ACFRE

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How do we begin?



- Information overload about fundraising techniques
- **How can we be strategic** rather than following trends?
- We have to think about this situation differently and benefit from multiple perspectives... ones we don't think about in daily fundraising efforts and planning
- For me, that means looking to history and strategy to help us frame this situation before we think about tactics

History Reassures Us



War of 1812

Innovation to sell couple in-kind gifts with manufacturing of linens and commodities to make orphanage financially secure

Used state funds and quasi-governmental activities to secure asylum

World War I

Women fully funded hospitals

Started new organizations to meet needs

Taught nonprofit leadership, helping other countries start service organizations

Kitchen soldiers

Philanthropy Played a Role

Spanish Flu Pandemic

Volunteers produced surgical dressings

537 volunteers made 83,606 masks in 17 days

Motor Corps volunteers delivered meals to homes

Distributed pamphlets about coughing and distancing

Great Depression

Campaigns were completed

Many limited giving to labor, homemade goods

Annual gifts decreased from 1932-1935 and rebounded

Government was concerned emergency funds would cease private philanthropy



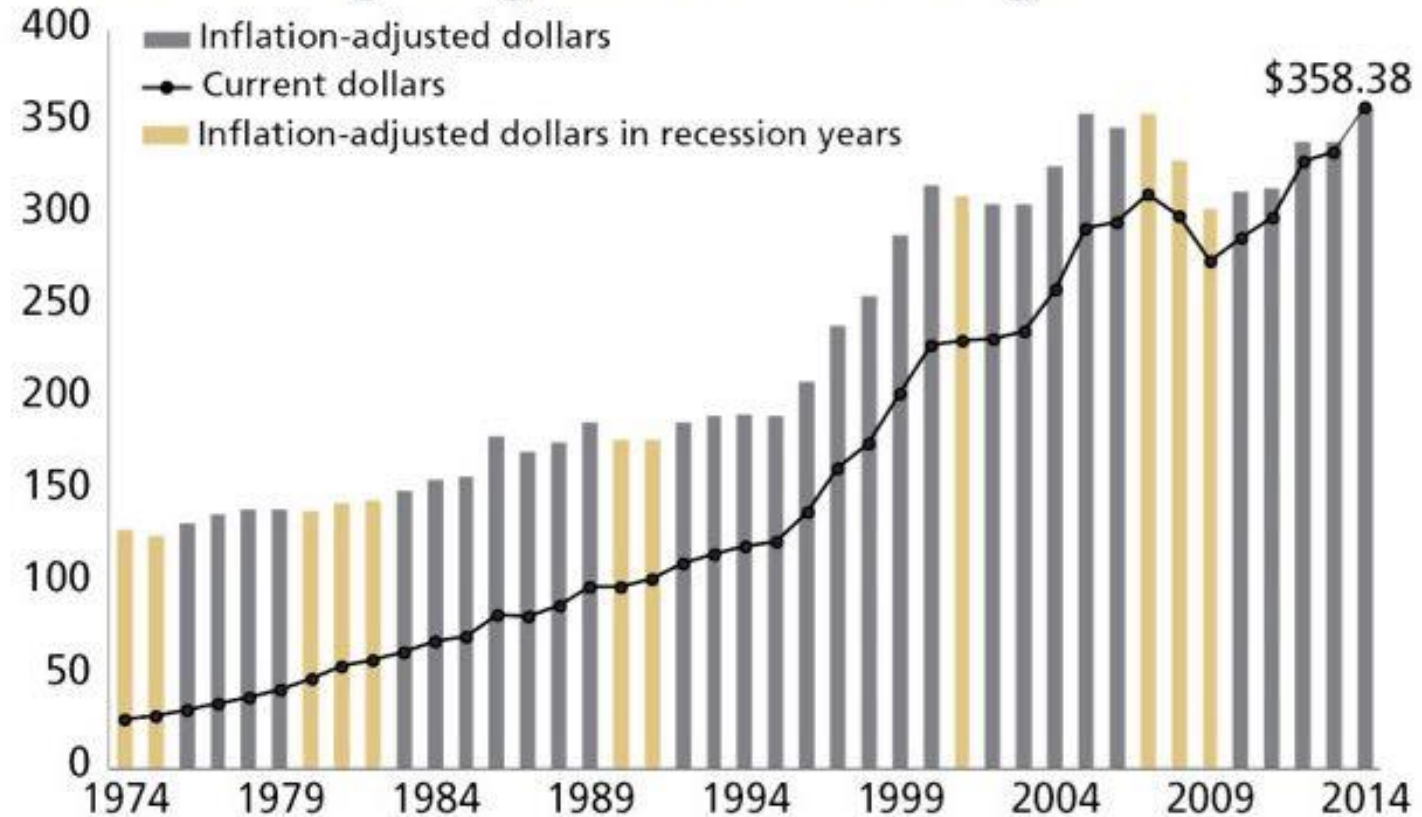
History Reassures Us



Positive giving trend over the past 40 years

Giving dropped for two years after the Great Recession before it started to recover

Charitable giving hits a record high



SOURCE: Giving USA Foundation | GIVING USA 2015



What is a Strategic Approach to Fundraising?

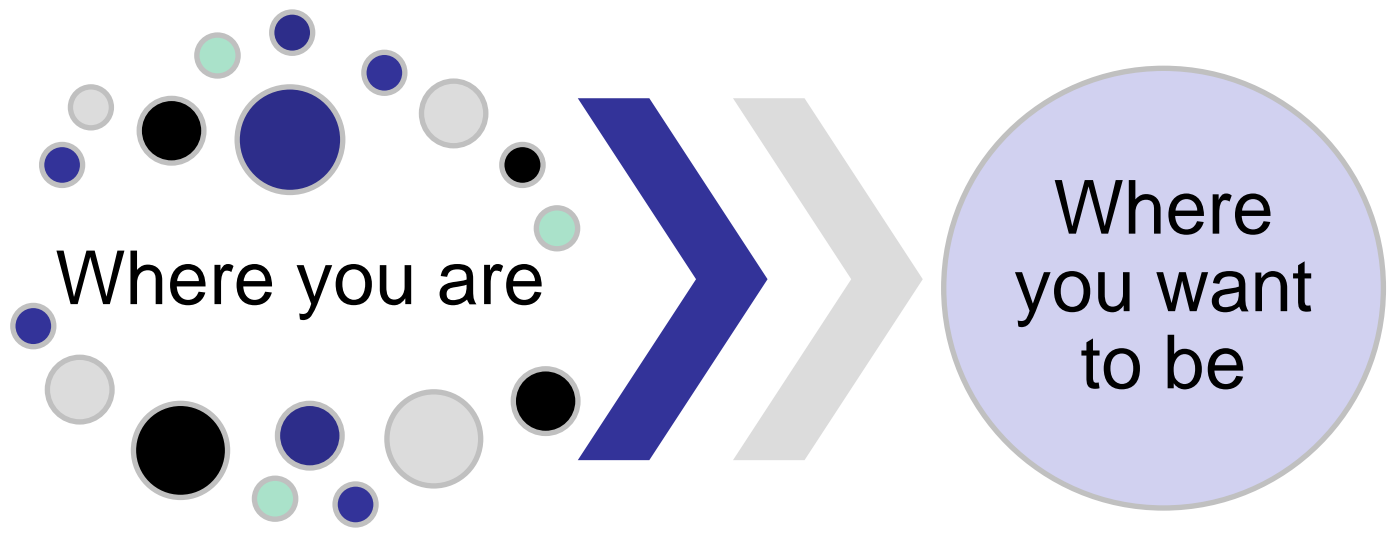


To be strategic, we have to stop and ask ourselves: “what is happening?”

Our Strategy



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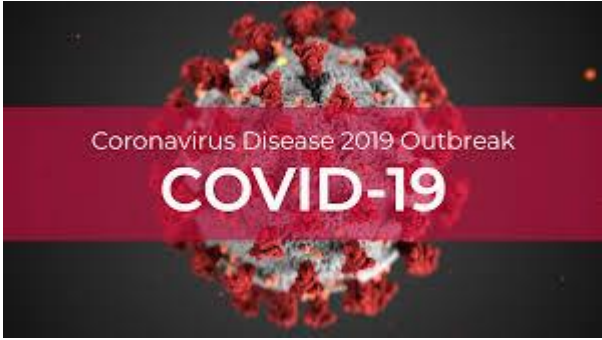


- Intentional and based in data, not trends
- Aligns with your organization's mission and values
- Meets best practice standards for the profession



Assess Your Fundraising Environment

- Understand your organization’s place in the nonprofit ecosystem and figure out how your mission contributes to our current problems
- Be transparent about your finances, realistic about your organization’s role in the current situation, and **sensitive to donors who may be dealing with many issues**





If Your Mission Was Important A Month Ago, It Still Is

Revise (or develop) a Fundraising Plan



- Educate the CEO, CFO, and Board so they can see the actions you are taking produces results
- Demonstrate what will not happen if you layoff the fundraising staff; philanthropy is going to help you rebuild after COVID-19 so you need people to do it
- Be specific in the plan and provide examples of goals such as maintaining donors and adjust revenue projections for events
- Use the plan as a tool to present the value of the development office without appearing self-interested or defensive
- Create an opportunity to talk about diversify fundraising and revenue streams

What is Happening in Fundraising Today



- Organizations are raising money
- GivingTuesdayNow was on May 5
- Galas moved on line in Houston, and one exceeded goal and raised over \$560k
- Innovation solicitations – video and text are producing results
- Corporations and Foundations are still figuring out how to help
- People are giving from their Donor Advised Funds (DAFs). Fidelity reported May 5, that their clients have increased their DAF giving by 18% over the same time as last year, and have made grants to 8,000+ nonprofit organizations. \$236 million specifically directed toward COVID-19 response since January 2020 (*Chronicle of Philanthropy*, May 6, 2020.)

Fundraising Tips



- **Overcommunicate** with your donors. Pick up the phone. Call to check on them. Ask if you can help them, and **listen!** Thank them for their support.
- **Inform your constituents** about how your organization is doing and how you are adjusting to serve them. Assure them your organization is assessing and adapting to the situation.
- **Talk to your most loyal donors.** Yes, include major donors, but also those who have given 5 years+ consecutively. Those loyal donors are who we can go to in times of challenge.
- **Frame the needs** of your new case for support in terms of the needs of those you serve. People are persuaded by knowing organizations are meeting clients' needs, not by organizations that have needs.
- **Use social media** to stay connected with all your constituents, and be sure to share good news and stories with your audience.
- **Be sensitive** to current conditions, but do not stop fundraising and do not assume that donors will not want to support your good work.

Pivot your Case for Support



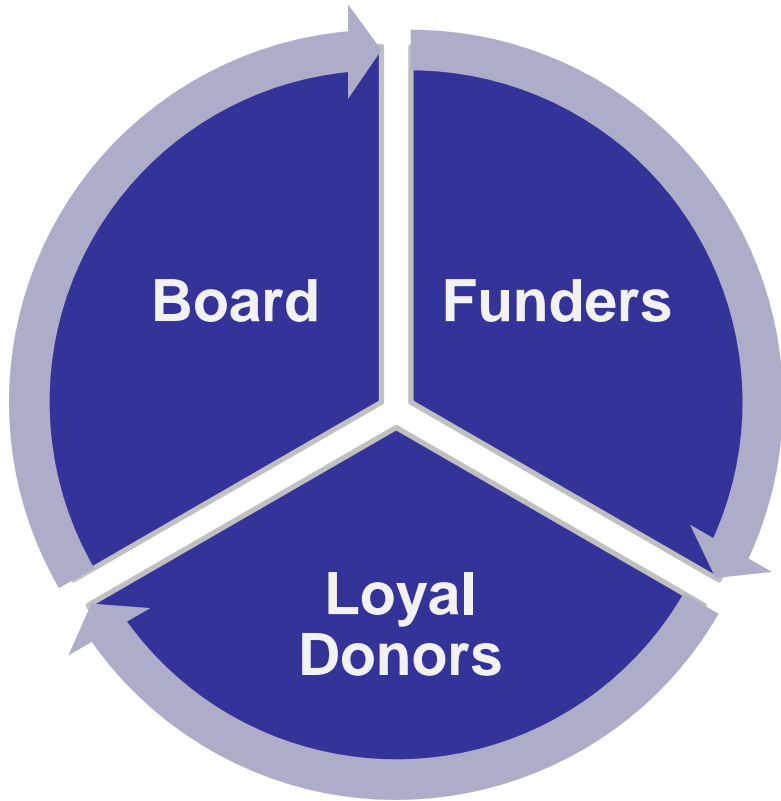
Be transparent and only ask for what you need to continue carrying out your mission and serving others now

- Sharing your needs may lead to questions from donors about your organization's financial stability – such as “why don't you have a 6-9 month reserve to absorb this shock?”
- Prepare talking points any staff or board member can use while talking with donors
- Have a sustainability plan to show you are a good investment

Frame needs as those of the individuals you serve

- People are persuaded by knowing organizations are meeting the needs of clients, not by an organization having needs or being in crisis
- Explain how their gift will support others and your mission
- For example “*Please give now so we can continue to provide after school programs when we can all meet in person again*” is more persuasive than “*give now or we will have a reduction in staff*”

Fundraising First-Steps



Now is the time to assess your organization, and be in communication with your top and most loyal constituents – those who have given five or more years.

Donors still care about your mission, so do not assume they will not give.

Managing Fundraising Remotely



- In the future, we may not see as many regional gift officers as we and donors learn virtual visits are productive.
- Look to best practices we may have used in regional officers
- Check in weekly as a team
- Making sure everyone on the team has access to same resources that they normally would if in the office
- Build time into each meeting for the team to catch up with each other, and allow them to share their life and space
- Rely on your metrics/dashboards to see progress
- Make time for one-on-one calls to encourage and mentor

Fundraising from a Distance



- **Leverage technology**
 - In-person meetings can be virtual meetings
 - Use podcasts or videos to communicate with donors
 - Virtual reunions and stewardship events
- **Communicate more on social media outlets**
 - Share good stories and let people see how your organization is adapting
- **Use digital fundraising**
 - Many platforms for peer-to-peer
 - *Engage By Cell* is texting service you can use to send messages, video links and collect donations (get a free demo, 50% discount and money back guarantee by contacting Christa Mallard at christa@engagebycell.com with code ANGELA50)

Can we recover from cancelled events?



- Can make it a virtual event
- Can cancel the event, but ask people to donate the cost of their ticket, table or registration
- Can postpone the event
- Can choose to move away from reliance on events and diversity your funding streams

Lessons from Veteran Fundraisers



- During check in calls, about 10-30% of donors will want to know how they can give
- Tax benefits may influence timing of large gifts you did not expect
- Be willing to do whatever it takes to help your organization's
- LISTEN
- Talk to more donors, with more frequency than usual
- Be clear about what your organization needs to carryout the mission
- Focus on quarterly fundraising plans because the future is uncertain
- Campaigns can continue, but expect to have delayed results
- Invest in your staff and reward the behaviors you want to see
- Take advantage of this time to improve systems, gift entry, reporting and analytics
- Keep doing prospect research
- Engage volunteers remotely

Direction from Top Four Fundraising Textbooks



External

- Your Organization and the Outside World
- Campaigns More Than Money
- Stewardship
- Telling Your Story and your Case for Support
- Discipline of Gratitude
- Earning the Public Trust

People

- Nurture Relationships
- What Donors Value
- Involve Volunteers
- Human Resources
 - Recruitment
 - Retention
 - Motivation
 - Managing Teams

Tactics

- Structuring Fundraising
- Managing the Fundraising Process
- Art of Solicitation
- Types of Giving
- Information
- Ethics and Doing the Right Thing

Ten Steps for Fundraising Going Forward



- 1) Be intentional in all that you do
- 2) Educate and encourage your leadership to continue fundraising
- 3) Take the time to assess your organization
- 4) Create a relevant case for support
- 5) Develop a fundraising plan (knowing you will have to adapt quickly)
- 6) Communicate with and listen to as many donors as possible
- 7) Experiment with technology as new ways to cultivate and solicit donors
- 8) Catch up on database maintenance and reporting
- 9) Reimagine your development operation and processes
- 10) Take care of your team, your volunteers, and your donors



Our incredible stories of giving are unfolding every day and, as a nonprofit professional, you get to be a part of creating these.



Center for Nonprofits & Philanthropy Bush School of Government and Public Service Texas A&M University

Phone: (979) 862-3195

Fax: (979) 845-4155

Email: bushschool.nonprofitmanagement@tamu.edu

<https://bush.tamu.edu/nonprofit/>

Contact Dr. Angela Seaworth with questions at aseaworth@tamu.edu