Thank You

**Sponsors**

- Swafia Ames, Brighter Strategies
- Whitney Brimfield, Sparkpoint Fundraising
- Nadine Gabai-Botero, Focus Fundraising
- Kim Jones, Nonprofit Village
- Amanda Katz, JCADA

**Partners**

- Candid.

**Speakers**

- Loree Lipstein, Thread Strategies
- Carlyn Madden, Good Insight
- Elizabeth Madjlesi, Candid
- Jamie McDonald, #GivingTuesday
- Jeffery Tribble, The Musicianship
Today

**Morning**
Welcome, General Nonprofit Response to COVID-19, Keynote

**Afternoon**
Peer Conversations, Fundraising During COVID-19, Racial Justice Panel, Breakout Sessions

**Evening**
Virtual happy hour

**Unique Links**
There will be a new link and Zoom for each session

**Chat**
We encourage you in all sessions to chat thoughts and questions, but other than in the peer conversations, stay on mute for most of the presentations

**Questions**
lrosenbaum@cfp-dc.org
If you have any issues throughout day send Laura an email
Nonprofits and COVID-19
Planning Your Response

7/23/20
Impact of COVID-19 So Far

New Normal, New Challenges

**Finances**
Over ¾ facing major challenges or threats to long term stability

**In-Person**
2/3 have already cancelled in-person events

**Programming**
Nearly 90% have shifted virtual

**Decisions**
Over half have delayed major decisions or purchases
Impact #1: Working Remotely

Considering Reopening

**Upgrade**
- Consider work life experience of staff
- Small policies, items, or expenses that can remove pain points
- Consider small personal stipend for office upgrades
- Do tech/office supply check-in monthly

**Discuss**
- Continue weekly team check-ins and every has a 1-on-1 weekly
- Ask team what they want for short term and long term office
- Encourage peer to peer dialogue

**Plan**
- Have a flexible reopening plan if you’re going back
- Depending on lease/ownership, consider longer term office solution as well
- Try to give staff 4–6 weeks of certainty
- Re-evaluate monthly
Impact #2: Programming

Moving Both Options Forward

Communicate

• Need to be telling clients and supporters what is happening even if still undecided
• Try to give certainty at least for rest of summer
• Give a date you’ll make a decision about fall or initial reopening
• When reopening, explain changing circumstance and how to stay informed

All Options

• For many organizations, need to be planning in person and virtual programming for fall/winter
• Have two expense and revenue models for both options
• Work with staff to decide when decision needs to be made

Evaluate

• Have done virtual for 4+ months
• Start evaluating success
• Ask clients and staff
Impact #3: Fundraising

Stay Engaged and Relational

**Relationships**

- Need to stay engaged with donors even if not asking
- Send at least monthly updates
- Offer glimpse into what work looks like now
- Ask how they are

**Contact**

- Stay in touch across summer
- Virtual town halls or small events
- Write a thank you/update letter
- More engaged than normal summer

**Plan**

- Majority of major donors who have given for more than three years will continue to (80-90%)
- Middle levels donors will depend on engagement/stewardship (40-60%)
- Grassroots donors most vulnerable (20-40%)
## Impact #4: Events

<table>
<thead>
<tr>
<th>Timing</th>
<th>Virtual</th>
<th>Realistic</th>
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<tbody>
<tr>
<td>• In-person fundraising</td>
<td>• Many groups moving event online</td>
<td>• Set realistic goals (fundraising will likely be lower)</td>
</tr>
<tr>
<td>events through fall</td>
<td>• Options include livestream, recorded programming, or a straightforward</td>
<td>• Need 4 weeks of advertising minimum</td>
</tr>
<tr>
<td>should be postponed</td>
<td>fundraising campaign</td>
<td>• Ask likely attendees what they want</td>
</tr>
<tr>
<td>• Ensure flexible contracts</td>
<td>• As things reopen, there is an increasing competition for attention,</td>
<td></td>
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<tr>
<td>for events through fall</td>
<td>which requires shorter, more focused events</td>
<td></td>
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<tr>
<td>• If small event of less</td>
<td></td>
<td></td>
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<tr>
<td>than 50 people, may be</td>
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<td>able to in late fall</td>
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Impact #5: Individual Donors

Relationships and Specificity

Reach Out
- 1-2 touch points before end of year season
- For major donors, one personal and one group
- All should be invited to something

Be Specific
- If making an ask, be very specific about what it is for or why
- Donors face an uncertain financial future with jobs and stocks
- Need to cut through doubt with specificity
- Avoid feeling transactional

Make a Plan
- 3 people with 2 calls per day could call top 78 donors by mid August (117 if 3 calls)
- Offer “exclusive briefings” to groups of 40 donors or less
- Ask for feedback or advice through a poll

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Impact #6: Communications

Clear and Consistent

Make a Plan

• Everyone is communicating differently
• Need plan through fall
• Should include who is doing what, short-term goals, and any messaging details
• Time of engagement prior to end of year

Stay Relevant

• Need to have content to post through COVID-19 lens
• Can still engage and people are looking for positive content
• Right answer isn’t silence either

Explain Pivot

• Explain pivot if you have done or are doing so
• Don’t oversell, but focus on creativity, work, and impact
• Show message of hope despite challenges
## To-Do List

### Things to Do Now

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<tbody>
<tr>
<td><strong>1</strong></td>
<td><strong>2</strong></td>
<td><strong>3</strong></td>
</tr>
<tr>
<td><strong>Staff</strong></td>
<td><strong>Prioritize</strong></td>
<td><strong>Share</strong></td>
</tr>
<tr>
<td>Consider some engagement activity during Aug/Sept.</td>
<td>Lots of options for program shifts so focus on 1-3</td>
<td>Through email, calls, or social media, update others on work</td>
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<tr>
<td><strong>4</strong></td>
<td><strong>5</strong></td>
<td><strong>6</strong></td>
</tr>
<tr>
<td><strong>Plan</strong></td>
<td><strong>Thank</strong></td>
<td><strong>Long-Term</strong></td>
</tr>
<tr>
<td>Project plan and cash flow through 2020, communications through September</td>
<td>Staff, supporters, clients for their flexibility—show gratitude frequently</td>
<td>Consider 1-2 long-term projects you can make progress against right now</td>
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