



Fundraising During Covid-19



Voices of Summer Webinar Series



About NSLA

NSLA is a national, non-profit organization focused on the powerful impact of one achievable goal: investing in summer learning to help close the achievement gap. NSLA uses the power of research, advocacy, training, and policy to transform America's neighborhoods and communities, one child at a time.

Our work is based on the simple idea that summer—a time that is easily overlooked yet critical to educational development—is bursting with possibility, and instrumental in closing the achievement gap between privileged children and our most vulnerable children.





SUMMER PLAYBOOK

Summer Learning: A Bridge to Student Success and America's Recovery, a COVID-19 PLAYBOOK



Summer Learning

A Bridge to Student Success
and America's Recovery

A COVID-19 PLAYBOOK



Featured Guest



Nanette Fridman
Principal
Fridman Strategies

Fundraising During COVID-19
September 2020
Nanette R. Fridman



FRIDMAN
STRATEGIES



CORONAVIRUS

Goals

- ✓ Discuss how to reassess your fundraising strategy and refine your message in the context of COVID-19.
- ✓ Explore what is "appropriate" regarding fundraising now and how you can balance the tension between being tone-deaf and bold during this chaotic crisis.
- ✓ Talk about ways to engage your board.
- ✓ Leave with action items to do now and for year end.

Reassess your Fundraising Strategy

- Major & Board Donors - Line by Line assessment is required. Look at open pledges and multi-year gifts. One-on-One solicitation.
- Annual Campaign – Direct Mail, Email, Phone-athon, Text-athon, Peer-to-Peer, Days of Giving, Online Giving, Crowdsourcing
- Monthly/Subscription Giving
- Events – Reschedule/virtual
- Foundation grants
- Corporate grants, sponsorships, partnerships, cause marketing
- Government funding

Foundations

- 745+ Foundations have signed the Council on Foundations pledge
- Loosen or eliminate the restrictions on current grants
- Check-in
- Review and confirm commitments
 - Discuss ability to loosen or eliminate restrictions if applicable
- Discuss opportunities for special COVID and ongoing funding
- Explain how you pivoted and how you are meeting the needs of the population you serve now

Corporate Donors

- Depends on their business impact
- Check-in
- Review and confirm commitments
 - Discuss ability to redirect funds if applicable
- Discuss opportunities for COVID specific funding
- How does what you do support their brand or philanthropic priorities?
- Local cause marketing will be challenging post-pandemic because the crisis favors bigger established companies with deep pockets. (For example, McDonald's plans to spend \$100 million on marketing.) Let's face it: there will be fewer local businesses to partner with. – Joe Waters, <https://www.selfishgiving.com/blog>

Individual Donor Mindset

- People want to help
 - Giving brings meaning and fulfillment on a high level. It's something our brains are hard-wired to do.
 - People want agency.
- Don't decide for your donors if they want to give, ask!
- Historically, donors have not stopped giving to organizations they care about in times of crisis, but the amount and the timing might be different.

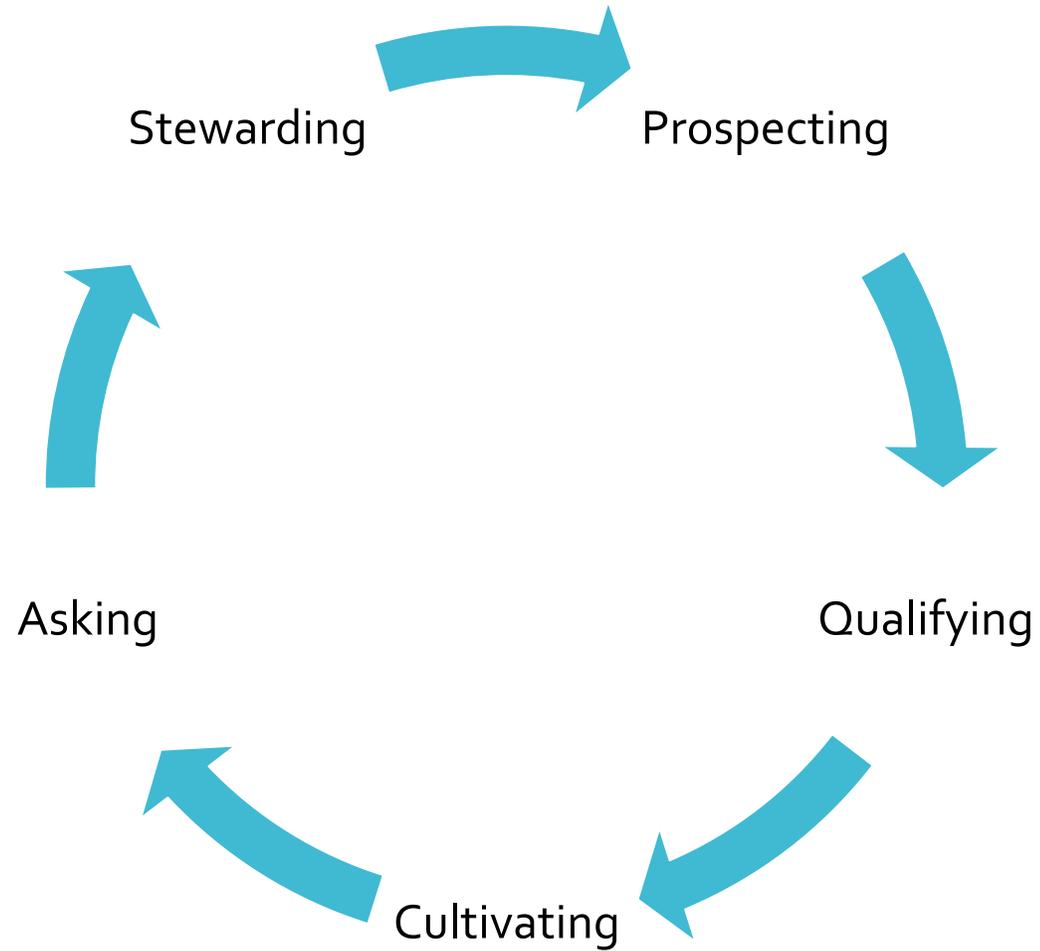
- Refine your message!
- What about your organization's mission is of most value in light of COVID-19?
- Are you experiencing increased need or demand?
- What are you doing to help? (If you are a national organization, how does it benefit front line programs?)
- How did you pivot and how are you creatively innovating and iterating to meet the evolving needs of the community because of this pandemic?
- Why is your organization qualified and situated to do so?
- How are the funds used to directly serve the people with need?
- What tough choices and steps has your organization already taken prior to coming to donors to reduce expenses?
- How does this translate to increased funding needs that you can present to your donors as opportunities for them to help?
- How are your donors valued?

Your Message

What Are You Asking For?

- Operating
- Emergency funding
- Specific programs

What is
Appropriate to
Be Doing
Now?



Stewarding

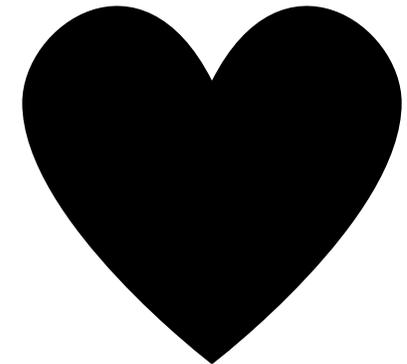
- Communicating
- Updating
- Providing Opportunities to Touch the Mission
- Relationship-building
- Sharing Impact
- Practicing Gratitude
- Recognizing

Principles of Strong Stewardship

- Honesty
- Clarity
- Transparency
- Timeliness
- Mission focused
- Regularity (but not too much to be annoying)
- Strike the right tone - realistic yet hopeful
- It's all about the stakeholder
- Use "We", "Us" and "Together"
- Tell stories
- Show impact
- Connectivity
- Gratitude

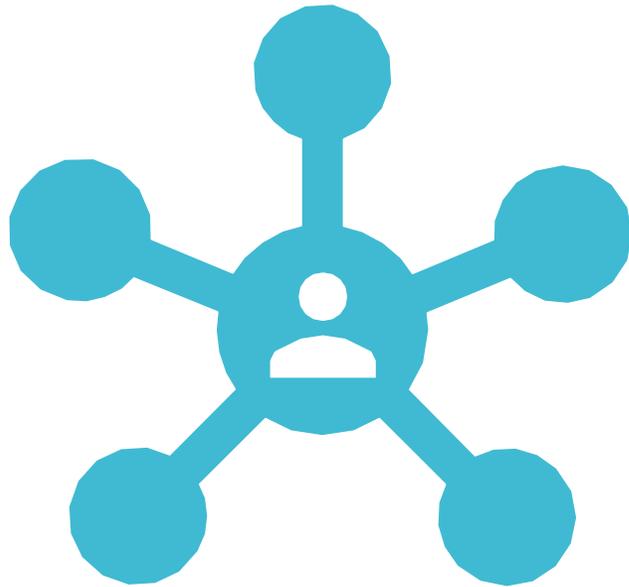
Stewardship Activities

- Call - You care about your donors!
- Record Messages and Send
- Email updates Useful Tips/Recs
- Videos
- Stories
- Testimonials
- Newsletters
- Invite Donor to Walk and Talk
- 1:1 Donor Video Meetings for Coffee or Drink
- Virtual Briefings from CEO/ED
- Virtual Town Hall
- Virtual Cocktail Party
- Virtual Field Trips to watch the Mission in Action
- Virtual Cultural Performances/Tours/Activities
- Watch Party
- Photo/video sharing campaigns
- Engage in thought leadership
- Volunteer opportunities



The Role of Your Board

- Board members are often reluctant to solicit. Every board member can steward donors.
- Give a script for thank you calls, texts or emails.
- Start with 5-7 names.
- Give a deadline.
- Create a tracker for accountability.



Cultivation Opportunities

Opportunity for creativity and innovation –
Start with your assets and build!

A chance to build relationships:

- Between organization and stakeholder

- Between individuals and stakeholder

- Among stakeholders

Reach new audiences and build list digitally and remotely

The Role of Your Board

- Ask every board member people to connect with people they know or prospect names you have and invite them to an upcoming online program or event or to learn more about your work.
- Start with 2-3 names.
- Give a deadline.
- Create a tracker for accountability.

Asking

- What is the need? Know your numbers! Be transparent.
- **Sustainability of your organization is a good reason even if you are not on the front-line.**
- Balance tension between being tone-deaf and bold during this chaotic crisis. *The future favors the bold!*

Who are You Asking?

- **Who are the Individual Prospects**
 - Board members – Past, Current and Future
 - Current donors
 - Past donors (Lapsed – LYBUNTS or SYBUNTS)
 - Consistent donors
 - Donor Advised Fund or IRA Donors
 - People who sign up for virtual programs/events or newsletters
- **Qualify the Prospects**
 - Capacity – Wealth Screen, Rating & Review, Zillow, PoliticalMoneyLine.com
 - Affinity
 - Frequency
 - Engagement
 - Connection to Staff/Board/Donor
 - Feedback from Conversation/Survey/Focus Group
 - Observation (Google Alert, Social Media)

The Role of the Board

- Some board members may be natural salespeople or experienced fundraisers. Put them to work as solicitors!
- Otherwise consider offering solicitation training to board members complete with role playing to get them comfortable making the ask.

End of Year Fundraising

- Decide on a powerful image, story(ies) and social media **slogan** to use for your year-end appeal.
- Send **season's greetings** to your staff, board, end-users, community, prospects, donors, foundations, corporations, and community partners.
- Run a year-end giving campaign with a **strong appeal letter** and have a social media component. Think multi-channel.
- Send **video season's greetings to donors** and/or invite large donors to appropriate year-end virtual events.

End of Year Fundraising

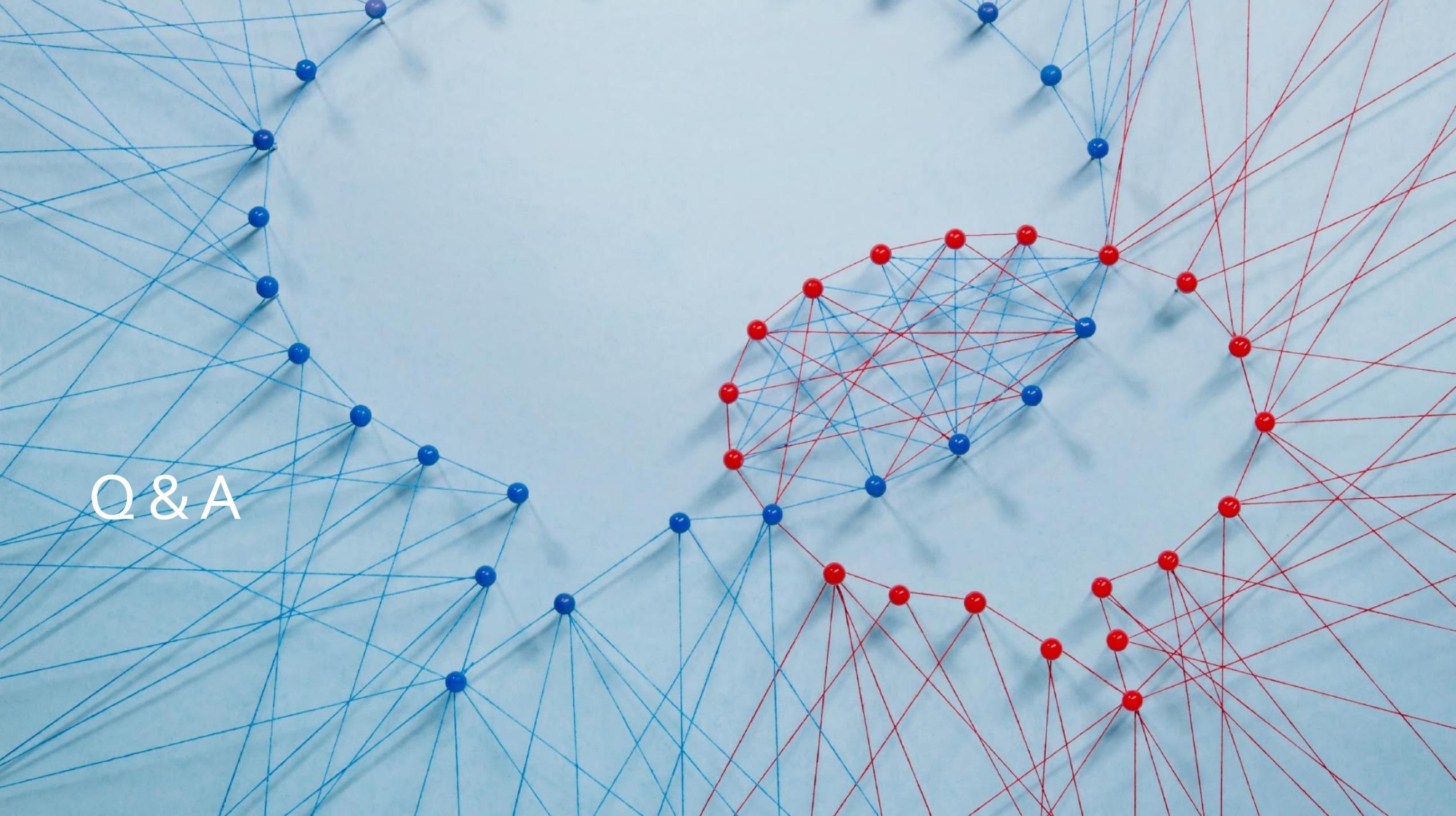
- Look at your top **lapsed donor lists** and identify the top 10-15 who have not given this year. The holiday season is busy but a time of generosity.
- Review your **top prospect list** and make as many one on one, virtual meetings as possible. Engage your board members!
- Make **pre-thank you for your past support and follow-up phone calls from your appeal letter** to your top annual appeal donors and lapsed donors.
- **Plan to send follow-up email appeals and post on social media during the last few days of December. Studies show that 40 percent of online donors make their gifts in December, and another 40 to 60 percent of those donations are made December 30 and 31.**

End of Year Fundraising

- Make sure your website is updated and has a great big, easy to locate **“donate now” button** and that making the actual donation is seamless.
- Make sure to focus on the donor – personalize and use the word **“you”** as many times as possible.
- Create **urgency**. What will happen if you raise this money? What will happen if you don't? Why should people act now?
- Use **charts and infographics** to convey your message.
- **Thank donors at least three ways, four is better.** Say thank you when they make a donation if online, by e-mail receipt, and by thank-you letter in the mail preferably with a hand-written note on it. Bonus: have a call thank-a-thon!

Action Items

- Engage development and finance committees in work of realistically re-forecasting fundraising projections and budgets
 - Requires line by line analysis informed by stewardship calls
- Update your message
- Communicate with transparency and frequency
- Update your fundraising plans with new strategies. Get creative.
- Engage staff, board and volunteers in stewardship, cultivation and solicitation
- Plan for year end fundraising
- **Don't stop fundraising !**

A network diagram consisting of numerous nodes and connections. The nodes are small, spherical beads, some colored blue and some red. The connections are thin, colored lines (blue and red) that link the nodes together, forming a complex web. The background is a light, solid blue color. The overall structure is dense and interconnected, with a central cluster of nodes and lines that branches out towards the edges of the frame.

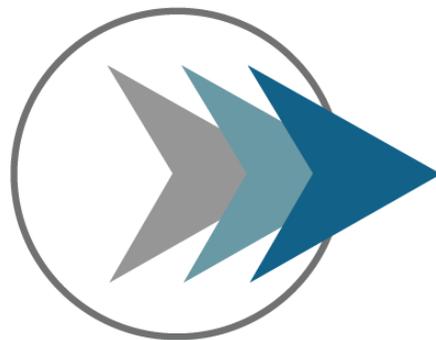
Q & A



Rough waters are truer tests of leadership. In calm water every ship has a good captain.

SWEDISH PROVERB

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F R I D M A N

STRATEGIES

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PLAN TO SUCCEED

HOLDING THE GAVEL

What **Nonprofit Board** Leaders
Need to Know



NANETTE R. FRIDMAN

*Author of On Board: What Current and Aspiring Board Members
Must Know About Nonprofits & Board Service*

Nanette Fridman has written the perfect book for board chairs. She provides a comprehensive outline of the role and succinctly and smartly describes exactly how to tackle what can feel like an overwhelming job. It is the indispensable guide for a difficult job.

Allison Fine

National Chair, NARAL: Pro-Choice America
Foundation, co-author, *The Networked Nonprofit*

Holding the Gavel is yet another gift to the nonprofit sector from Nanette Fridman. It is a clear, easy to digest, and complete roadmap for board chairs to help ensure their success in tackling the complex challenges of the role. As a nonprofit professional, I am especially grateful for the way in which Nanette frames the partnership between board chairs and their professional leadership.

Laura Fish

Executive Director, Douglas Institute Foundation

"If you've just been asked to join your first board or you're on ten boards, Nanette Fridman has written the book for you. On Board tells you everything you need, from A to Z and then some—and it's so readable!"
Peter Edelman, Professor of Law, Georgetown University Law Center

ON BOARD

WHAT CURRENT AND ASPIRING
BOARD MEMBERS MUST KNOW ABOUT
NONPROFITS & BOARD SERVICE



NANETTE R. FRIDMAN

Foreword by **Aaron Philip Dworkin**
President, After-School All-Stars National Network

Too often the expectations of board members and the workings of nonprofits have been vague or mysterious. Whether you are a professional or board member, *On Board* demystifies how nonprofits work and lays out in detail how board members can be responsible, effective and fulfilled.

Dr. Marc N. Kramer
Executive Director, RAVSAK

Nanette Fridman insightfully shares her experience with nonprofit boards to help individuals be more intentional, engaged and clear about their roles. Every governance committee should give this book to their new and ongoing board members.

Nancy K. Kaufman,
Chief Executive Officer, NCJW

Voices of Summer Webinar Series



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Voices of Summer Webinar Series

Good Nutrition Matters:

Experts Share Tips, Quick Meal Tricks and Back to School Strategies for Learning Success



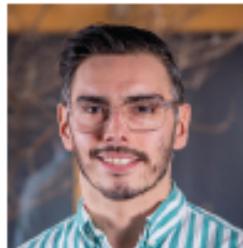
Moderator: Kim Doleatto,
Sarasota Herald Tribune,
Journalist and Mom



Cooking Demonstration
with Chef Kate Winslow,
Co-author of Onions Etcetera



Kelsey Boone, Child
Nutrition Policy Analyst,
Food Research & Action
Center (FRAC)



Daniel Hatcher, Director,
Community Partnerships,
Alliance for a Healthier
Generation



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