

Adjusting Your Development Plan Due to COVID-19



MAP

MISSION ADVANCEMENT



Objectives for Today

- *Fundraising planning considerations for the next 3, 6, and 12 months*
- *Learning from the last 4 weeks*



ADJUSTING YOUR PLANS IN THE MIDST OF UNCERTAINTY

ADJUSTING YOUR DEVELOPMENT PLAN DUE TO COVID-19



PLANNING THROUGH THREE DIFFERENT LENSES

- 1 The next 90 days**
- 2 The next 6 months**
- 3 The next 12 months**



The Next 90 Days

Finding Short-Term Success



KEY QUESTIONS TO DEVELOP A 90-DAY PLAN

- What is your actual need?
- Who is your audience?
- What resources do you have available?



DETERMINING YOUR SHORT-TERM NEEDS

- Budget – financial “gap”
- Tangible needs
- Programs impacted



WHAT IS YOUR FINANCIAL GAP?

- Forget budget line items!
- Review expenses and forecast adjustments
- How much do you need to raise to close the gap between newly forecasted expenses and actual revenue YTD?



WHO IS YOUR AUDIENCE?

- Who cares the most?
- What do they know?
- What is the best way to communicate with them?
- What is your story?



WHAT RESOURCES ARE AVAILABLE TO UTILIZE?

- Traditional plans/campaigns
- Virtual “versions” of previous plans
- People resources and skills
- Volunteers



Case Study / Exercise



TRI-CITY CHILDREN'S SERVICES – CURRENT SITUATION

- Fiscal Year ends 6/30; annual budget of \$5 million
- Spring Gala cancelled – usually nets \$700,000
- Development staff and CEO working from home
- Unable to give tours or ask donors (in person) to join annual giving programs



TRI-CITY CHILDREN'S SERVICES – DEVELOPING A 90-DAY PLAN

- Crunch the numbers – what is our gap?
- Develop talking points for our story – ensure they are embraced across the organization and communicated consistently
- Bring development team together to discuss gap and strategies we can execute
- Identify key donors and communication plan for each



TRI-CITY CHILDREN'S SERVICES – DEVELOPING A 90-DAY PLAN

- Develop timeline for execution
- Clarify roles & responsibilities...this is not business as usual!
- Manage expectations of staff and board leadership



The Next 6 Months

Planning in the Midst of Uncertainty



KEY QUESTIONS TO DEVELOP A 6-MONTH PLAN

- What is on the fundraising calendar through October?
- What fundraising practices are most at risk?
- How is your fiscal year influenced / impacted?
- How is your mission impacted by potential revenue loss during this time?



WHAT IS ON THE CALENDAR & WHAT IS AT RISK?

- List ALL fundraising activities: online, mail, events, seasonal campaigns
- Determine those at greatest risk
 - Events MUST have a “Plan B”
 - Review traditional messaging – is it relevant?
 - What do current supporters think?



FISCAL YEAR CONSIDERATIONS

- If your fiscal year ends in the next 6 months:
 - Take the 3-month “gap” approach
 - Be prepared to pivot to alternative plans if traditional events cannot be executed



FISCAL YEAR CONSIDERATIONS

- If your fiscal year continues beyond the next 6 months
 - Develop “Plans A, B, and C”
 - Review historical ROI / effectiveness of lower-revenue activities
 - This may be the time to remove activities with low return or low impact on the bottom line
 - Use the resources you have on highest value activities



HOW IS YOUR *MISSION* IMPACTED BY REVENUE LOSS?

- Challenge your messaging
- What will *not* happen as a result of revenue loss?
- Be positive – not negative
 - People do not want to give to a sinking ship
 - But they do want to know that their gifts are impactful
 - Donors want to *solve a problem!*



The Next 12 Months

**And Learning from
the Last 4 Weeks...**



Learning from History



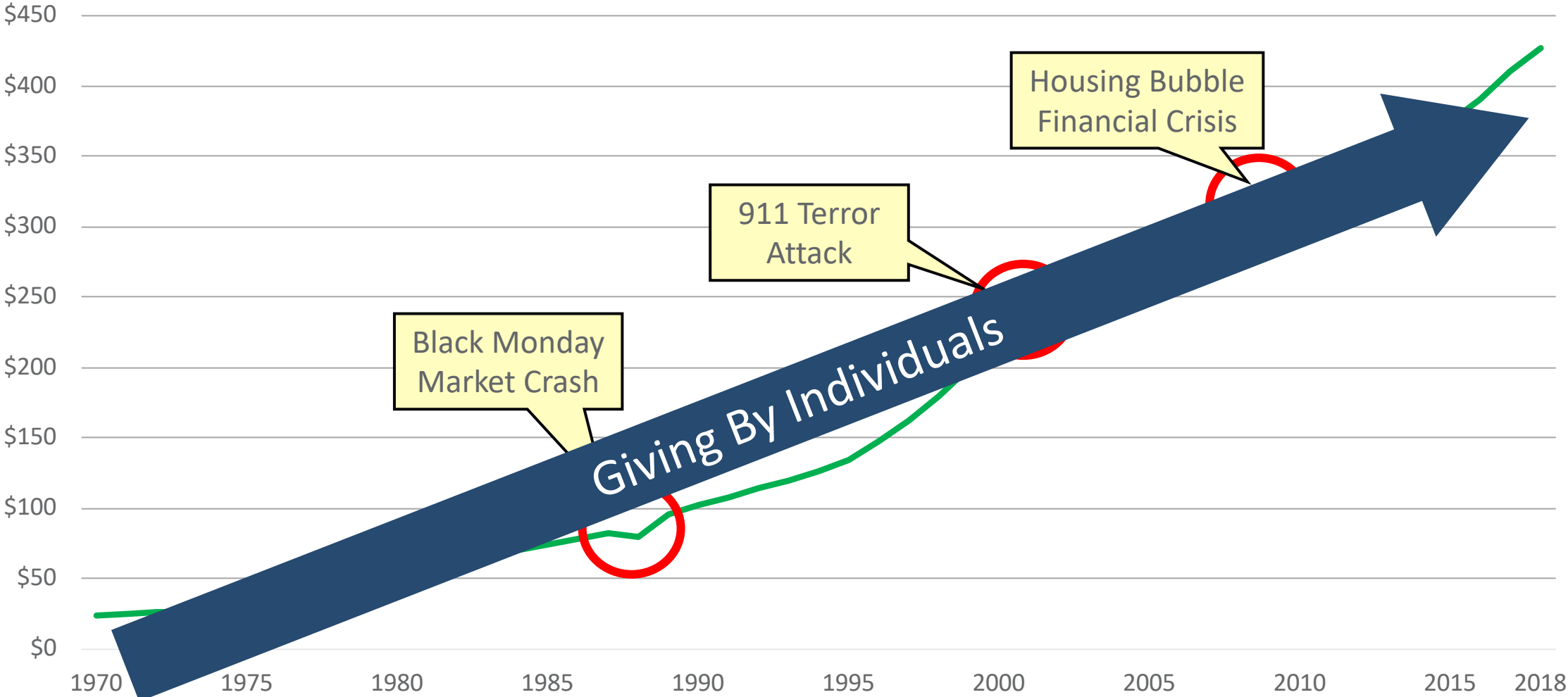
WHAT DO WE KNOW ABOUT PEOPLE?

INDIVIDUALS WILL GIVE...

- Giving in the U.S. has risen consistently over the past 60+ years
- There are two exceptions to this year-over-year growth – 1987-88 and 2007-09
- Philanthropy in America in those two time periods fell less than 4% in each instance
- But giving from individuals did not drop in either instance
- Giving from individuals accounts for over 70% of all philanthropy in America and has been the most consistent and sustainable funding



USA Giving in Billions



Learning from the Last 4 Weeks



IN THE LAST 4 WEEKS....

- Who has responded?
- What has mattered?
- What has *not* mattered?
- What has been a stabilizing factor?
- Which organizations have fared well?



IN THE LAST 4 WEEKS....

- Who has responded? ***Those who know and trust you***
- What has mattered? ***MISSION***
- What has *not* mattered? ***Parties, auctions, entertainment***
- What has been a stabilizing factor? ***Relationships***
- Which organizations have fared well? ***Those who have developed deep, trusting relationships with their donors***



PLANNING FOR YOUR NEXT 12 MONTHS

- Review all of your funding strategies and ask these questions:
 - Who is our audience?
 - What is our message?
 - What are the non-financial objectives?
- Who are your Top 100 donors?
 - Are you in relationship with them?
 - Do you know what they care about?
 - Why do they support you?
 - Is their support sustainable/growable?

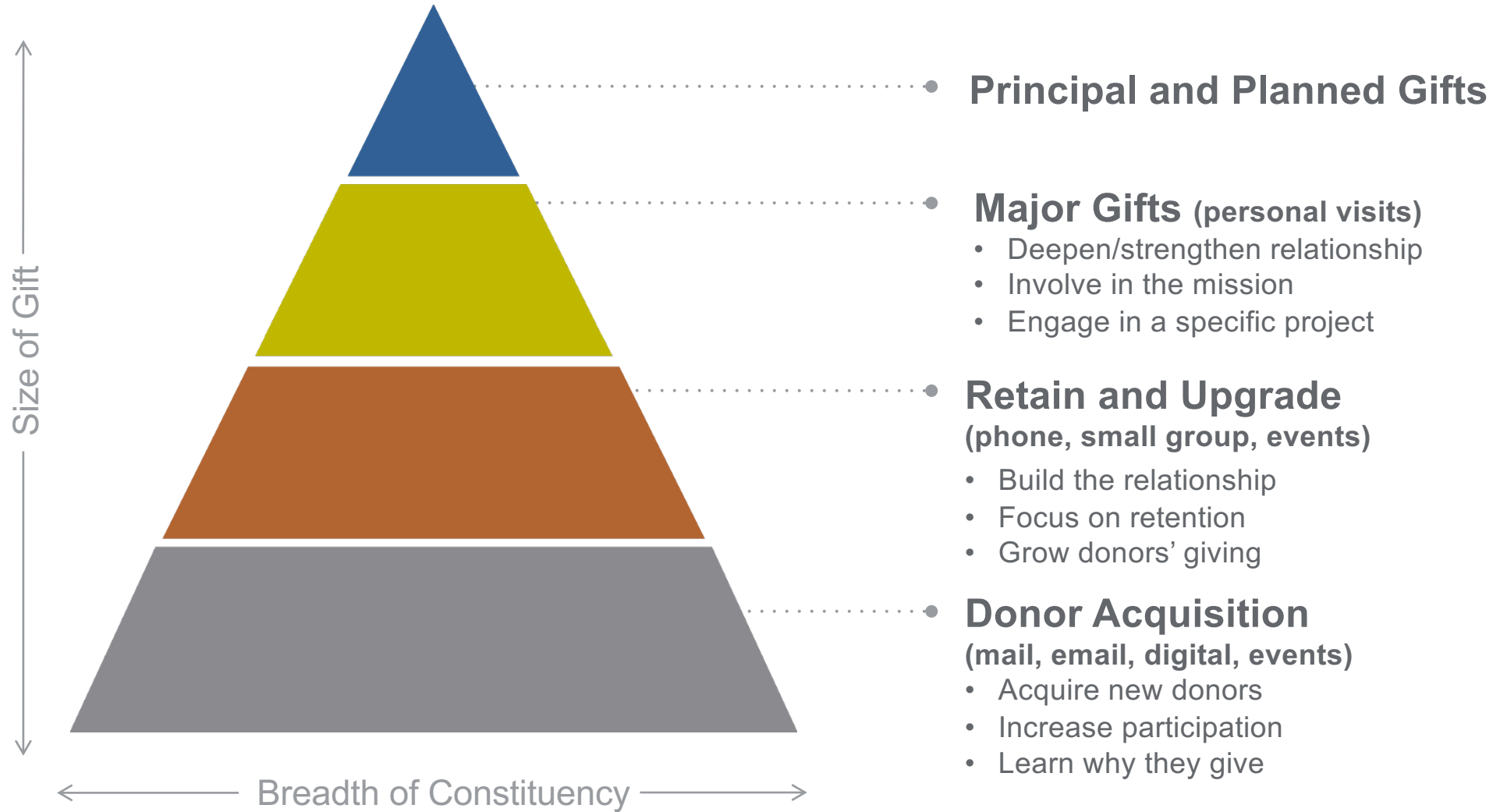


PLANNING FOR YOUR NEXT 12 MONTHS

- › Take this opportunity to challenge strategies that are not:
 - › Mission focused
 - › Relationship driven
 - › Designed as part of a broader strategy
- › Be Bold!!



ALIGNED DEVELOPMENT STRATEGIES



*Six months from now, what
will you wish you would
have done more and/or
better during this time?*



Regardless of your current situation, evaluate your short-, mid-, and long-term planning to maximize relationships and mission impact!





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Go to our website: MissionAdvancement.com

Development Strategies During COVID-19 Crisis

Mission Advancement is offering you and your organization a free 30-minute consultation with one of our development professionals – no strings attached.



YOUR QUESTIONS

