



FUNDRAISING

D U R I N G A C R I S I S

Tuesday, March 31, 2020



TODAY'S AGENDA

- **Progressive Pipeline & Portfolio Management**
- Betsy Chapin Taylor & Heather Wiley Starankovic (Accordant)
- **Showing Value & Fundraising With A Purpose**
-Daniel Cohen (Graduway)
- **Remote Teams, New Data, & Principal Gifts**
-Bonnie Devlin & Chris Biehn (Washburn & McGoldrick)
- **All Hands on Deck**
-Trent Beattie (iWave)
- **Crisis Communications: What Now?**
-John Brodeur (Brodeur Partners)

TODAY'S PRESENTERS



Trent Beattie
trent.beattie@iwave.com
VP of Strategic Alliances



Chris Biehn
chris.biehn@wash-mcg.com
Senior Consultant



John Brodeur
jbrodeur@brodeur.com
Chairman



Daniel Cohen
daniel.cohen@graduway.com
CEO & Co-founder



Bonnie Devlin
bdevlin@wash-mcg.com
Managing Principal



Adam Martel
adam@gravityty.com
CEO



Heather Wiley Starankovic
heather@accordantphilanthropy.com
Principal Consultant



Betsy Chapin Taylor, FAHP
betsy@accordanthealth.com
CEO



PROGRESSIVE PIPELINE & PORTFOLIO MANAGEMENT



Betsy Chapin Taylor, FAHP
betsy@accordanthealth.com
CEO



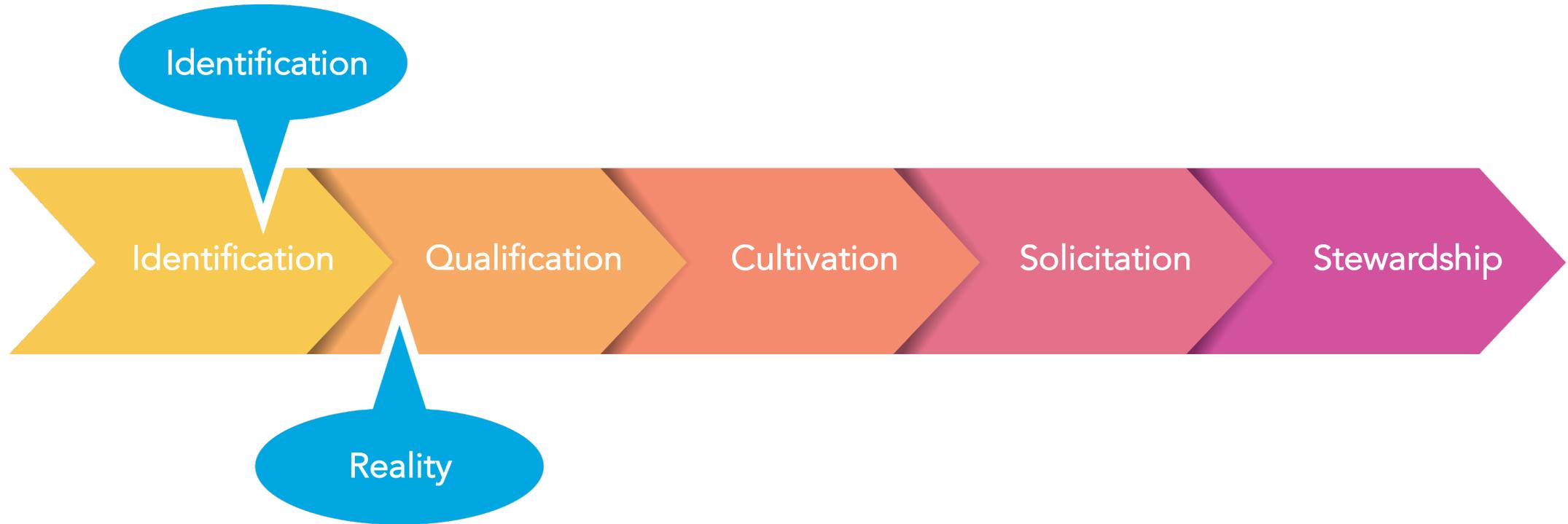
Heather Wiley Starankovic
heather@accordantphilanthropy.com
Principal Consultant



Progressive Pipeline and Portfolio Management



Progressive Pipeline and Portfolio Management



SHOWING VALUE & FUNDRAISING WITH A PURPOSE



Daniel Cohen

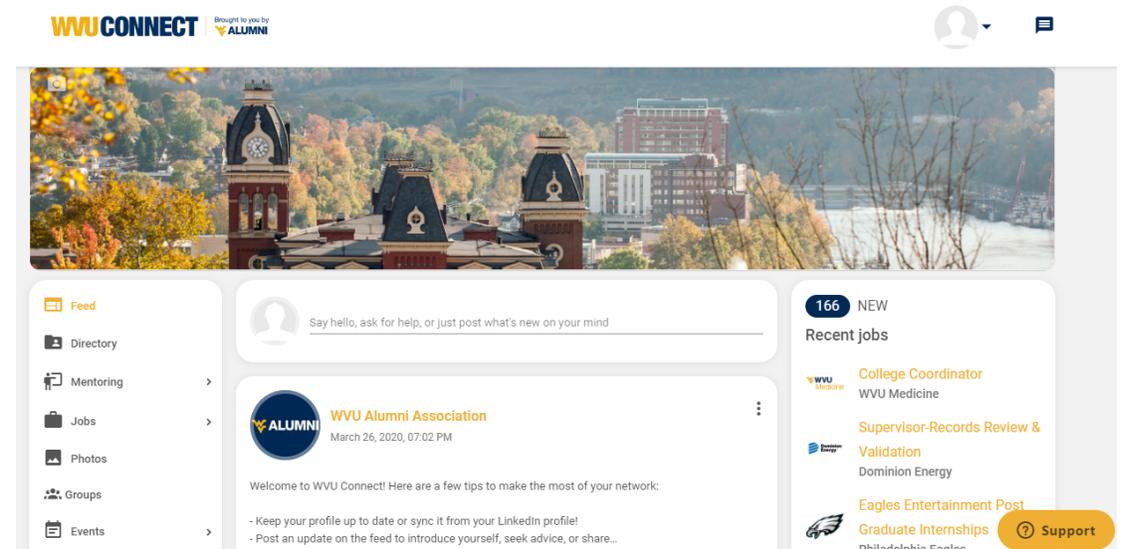
Daniel.cohen@graduway.com

Co-founder & CEO



Show Your Value!

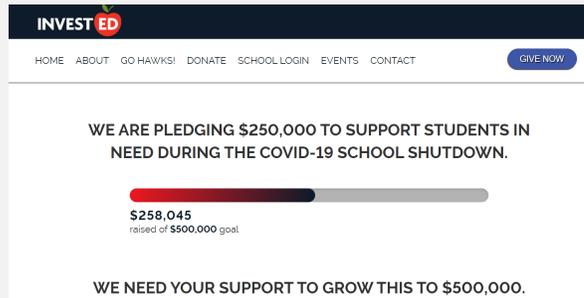
- **Engage First. Ask Second.**
- **Show Your Value!**
 - **Support** – digitally and bring your community together with opportunities to help one another.
 - **Careers** – space to find new talent, request career guidance etc.
 - **Businesses** – promote and support alumni/donor businesses



<https://www.linkedin.com/pulse/its-time-rally-troops-mountaineer-nation-sean-frisbee/>

Fundraise With Purpose!

INVEST ED



INVEST ED

HOME ABOUT GO HAWKS! DONATE SCHOOL LOGIN EVENTS CONTACT [GIVE NOW](#)

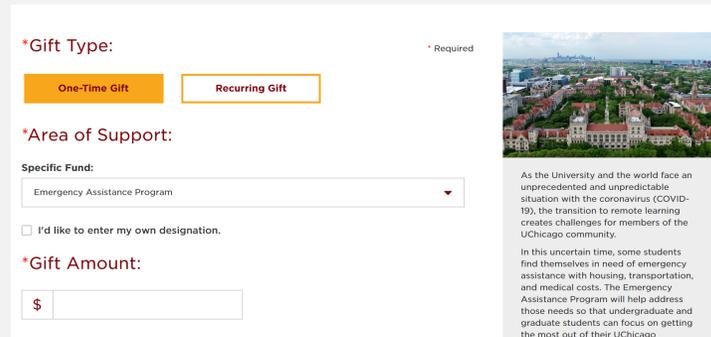
WE ARE PLEDGING \$250,000 TO SUPPORT STUDENTS IN NEED DURING THE COVID-19 SCHOOL SHUTDOWN.

\$258,045 raised of \$500,000 goal.

WE NEED YOUR SUPPORT TO GROW THIS TO \$500,000.

Supporting students, focused on **nutritional health and enabling remote learning**

University of Chicago



*Gift Type: One-Time Gift Recurring Gift * Required

*Area of Support:

Specific Fund:

I'd like to enter my own designation.

*Gift Amount:

As the University and the world face an unprecedented and unpredictable situation with the coronavirus (COVID-19), the transition to remote learning creates challenges for members of the UChicago community. In this uncertain time, some students find themselves in need of emergency assistance with housing, transportation, and medical costs. The Emergency Assistance Program will help address those needs so that undergraduate and graduate students can focus on getting the most out of their UChicago

School medicine **health care workers on the frontline** – family support, hospital equipment and student assistance with housing and medical costs

Elmhurst College



Elmhurst College @ElmhurstCollege · Mar 23

Bluejays, thank you for supporting each other through these challenging times. Stay safe, stay healthy, and stay virtually connected with your family and friends. #BluejayNation



Helping students with **food and/or housing** deficiencies

REMOTE TEAMS, NEW DATA & PRINCIPAL GIFTS



Bonnie Devlin

bdevlin@wash-mcg.com

Managing Principal



Chris Biehn

chris.biehn@wash-mcg.com

Senior Consultant

CELEBRATING
WASHBURN  MCGOLDRICK
YEARS OF SUCCESS



MANAGING REMOTE TEAMS

- Life/Work balance – What just happened
- Technology as a tool, not as a crutch
- Managing different teams remotely
- Having fun while working hard

DATA FROM THE FIELD

- WASHBURN & MCGOLDRICK survey
- Top concerns for fundraisers since moving to remote
 - Momentum
 - Economy
 - Virtual engagement
- Confidence around organization reaching goals
 - ◆ More than 75% are somewhat confident or less

PRINCIPAL GIFTS & COVID-19

- Stay in close touch with your organization's most generous donors, especially board members
- Check in first, if you haven't already done so
- Provide personal "insider" updates on both the impact of COVID-19 and ways your organization is responding. Tell stories of the heroes among your staff, clients, volunteers. Tie to their interests
- Respectfully ask permission to follow up on oral commitments, pending proposals, and postponed solicitations. Follow their lead, but don't assume "no" for them

PRINCIPAL GIFTS IN RECESSIONS

- Keep in mind that donors don't stop giving in recession but do give to fewer organizations, the ones they care about most
- Principal gift donors are most likely to care about the long-term health of your organization
- Articulate clearly the top fundraising priorities, especially if you are pivoting to focus on new or expanding needs
- Consider who among your top donors would be able to provide a challenge or matching gift to spur others to help
- Be flexible about timing, assets, and payment schedules

ALL HANDS ON DECK



Trent Beattie

Daniel.cohen@graduway.com

VP, Strategic Alliances



Your Resources – All Hands on Deck

- Knowing the Resources Available
- Thinking Differently About What You Have
- Using What You've Got



All Hands on Deck – What We've See

- The Reality and Pace of Change
- Philanthropists' Response
- Organizations' Activity



CRISIS COMMUNICATIONS: WHAT NOW?



John Brodeur

jbrodeur@Brodeur.com

Chairman

BRODEUR
P A R T N E R S

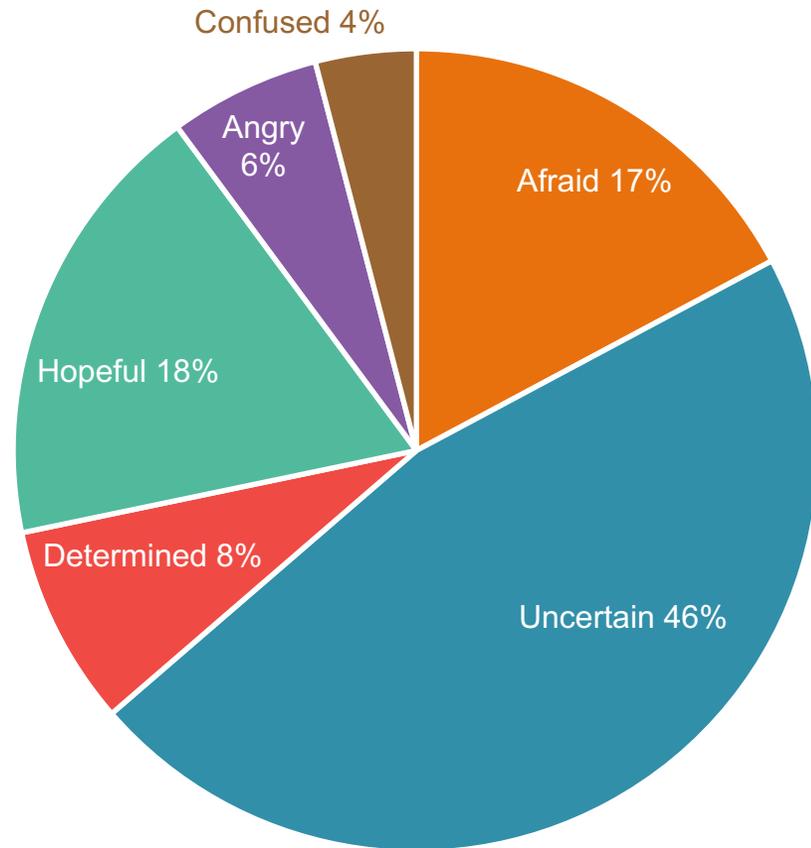


The background features several glowing, stylized virus particles in shades of blue and cyan, scattered across a dark blue field. The largest virus particle is centrally located, showing a textured surface with numerous protrusions. Other smaller virus particles are visible in the upper left, upper right, lower left, and lower right areas.

CRISIS COMMUNICATIONS: WHAT NOW?

March 31, 2020

In thinking about your business/organization and the current COVID-19 pandemic, which of the following words best describes OVERALL how YOU personally feel?



IN A WORD: “FUD”

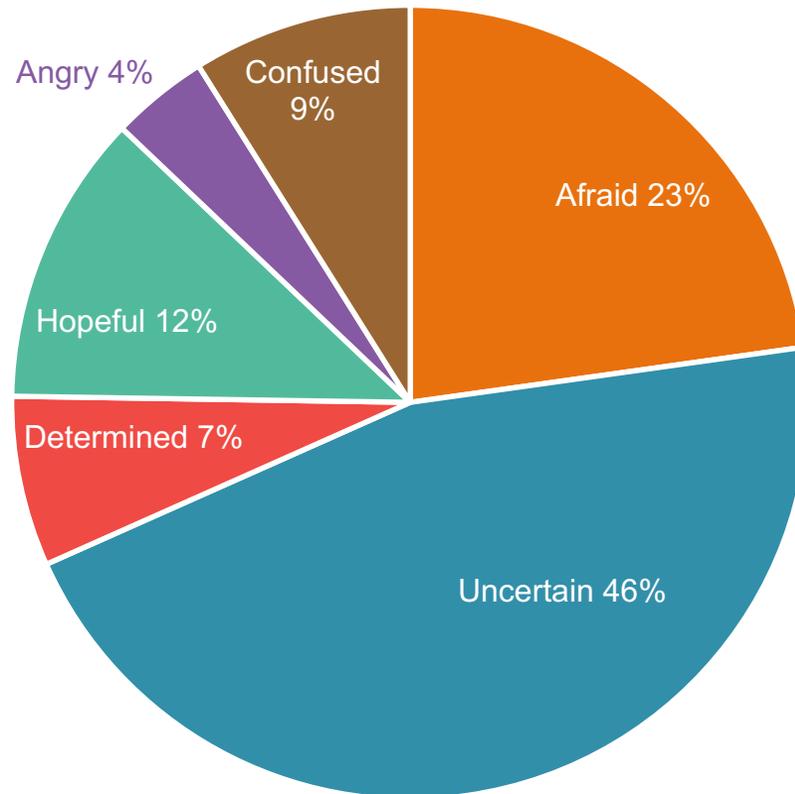
Today we are experiencing a global “FUD” factor

Uncertain and afraid are the words that best describe the way upper- and mid-level management feel right now.

Only one quarter (26%) say they are hopeful or determined.

Survey conducted March 21-22, 2020 among n=449 high-to-mid level professionals in the United States. Approximately 2/3rds (64%) were full-time employees, with the remainder either part-time (18%) or self-employed (18%).

In thinking about your business/organization and the current COVID-19 pandemic, which of the following words best describes OVERALL how your CUSTOMERS or CLIENTS feel?



Those emotions – uncertainty and fear – are even more pronounced among clients.

Nearly one quarter (23%) say that that “fear” is the best way to describe how customers or clients feel right now.

Less than one in five (19%) are hopeful or determined.

Survey conducted March 21-22, 2020 among n=449 high-to-mid level professionals in the United States. Approximately 2/3rds (64%) were full-time employees, with the remainder either part-time (18%) or self-employed (18%).

CASE: COLLABORATION IN THE UNKNOWN

- Struggling to stay open for most needy
- Changing the business model on the fly
- Community, organizations, government, volunteers joining
- GoFundMe...home run



WHAT'S NEXT?

- Start planning now for post-Covid world
- Stewardship and listening front and center
- Involve top leaders, public officials, celebrities, donors, Board to tell the story in “future lean” tense
- Ensure your values/purpose are reiterated/embraced

Q&A



FUNDRAISER SURVEY



<https://www.surveymonkey.com/r/CRISISFUNDRAISING>

TODAY'S PRESENTERS



Trent Beattie
trent.beattie@iwave.com
VP of Strategic Alliances



Chris Biehn
chris.biehn@wash-mcg.com
Senior Consultant



John Brodeur
jbrodeur@brodeur.com
Chairman



Daniel Cohen
daniel.cohen@graduway.com
CEO & Co-founder



Bonnie Devlin
bdevlin@wash-mcg.com
Managing Principal



Adam Martel
adam@gravityty.com
CEO



Heather Wiley Starankovic
heather@accordantphilanthropy.com
Principal Consultant



Betsy Chapin Taylor, FAHP
betsy@accordanthealth.com
CEO

