**Step 1 (From Task 2: Realign Fundraising Goals)**

**Apply** the “Crisis Fundraising Assessment” to your own organization for your top 5-10 funding sources (e.g. Government, Foundations, Major Donors, Monthly Donors, etc.) by completing the chart below.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Organization’s Name | | |  | | |
| Fundraising Target Summary | | | Approved | |  |
| Reassessed | |  |
| **Funding Source** | **Projected Revenue** | **Original Assumptions**  **(pre-pandemic)** | **Revised**  **Assumptions**  **(current)** | **Possible Actions Steps** | |
|  |  |  |  |  | |
|  |  |  |  |  | |
|  |  |  |  |  | |
|  |  |  |  |  | |
|  |  |  |  |  | |
|  |  |  |  |  | |

Note: Should you have question about completing this Action Plan please email: [clayton.rowe@saben.ca](mailto:clayton.rowe@saben.ca)

**Step 2 (From Task 3: Understand Donor Expectations)**

**Review** the following checklist of important donor engagement resources (tools, initiatives, and systems). **Check** the boxes which apply to your organization

|  |  |  |  |
| --- | --- | --- | --- |
| **Key Elements** | **Tools, Initiatives, and Systems** | **Implemented**  **Pre-pandemic** | **Reviewed, Updated, or Created** |
| **Articulate Mandate** | Statements of Values, Mission and Vision that shape our decision-making and communications |  |  |
| **Report the Impact** | Up-to-date cost/participant (or similar) calculations for our key programs |  |  |
| Key findings from recent program evaluations are easy for staff/stakeholders to access |  |  |
| Participant stories and community impact stats inform your public-facing communication platforms |  |  |
| **Invite to Participate** | Up-to-date Covid-19 Impact Messaging that is reflective of both our organizational strategy and how are participants are being affected |  |  |
| Covid-19 Messaging training to equip Board/Staff/Volunteers to reinforce our key themes |  |  |
| Communication/Engagement plans for each key stakeholder/donor group |  |  |
| **Invest in Relationships** | Up-to-date CRM system and clear procedures for implementation while working remotely |  |  |
| Offering specific opportunities for input from key stakeholders in light of Covid-19 |  |  |
| Annual donor acknowledgement / gratitude plan |  |  |
| © The Saben Group | | | |

*What specific action steps or research does this checklist lead you to consider for your own organization?*

Action Steps

**Step 3: (From Task 3: Understand Donor Expectations)**

**Evaluate** how your organization has integrated these approaches into your pandemic-informed fundraising.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Donor Retention Good Practices** | **Strong** | **Average** | **Poor** | **N/A** |
| Plan for thanking donors, including acknowledging donor’s giving history |  |  |  |  |
| Clear presentation of how donor funds are being spent and current need for funds |  |  |  |  |
| Regular opportunity for donors to express or update preferred method / frequency of communication |  |  |  |  |
| Plan for opportunities for engagement beyond financial investment |  |  |  |  |
| Pro-active management of organizational reputation in public sphere (e.g. media stories, endorsements from public figures) |  |  |  |  |
| Clear benchmarks for response time to donor questions or requests |  |  |  |  |
| Updates on innovation, learning and the organization’s strategic adaptation |  |  |  |  |
| Compelling project impact metric reporting |  |  |  |  |

**Capture** 3-5 potential action steps based on the checklist above

Action Steps

**Step 4: (From Task 4: Examine Online Fundraising Practices)**

**Evaluate** how you have engaged “good practices” in your online crisis fundraising.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Engaging Online Fundraising** | **Implementation** | | | |
| **Good** | **Average** | **Poor** | **N/A** |
| **Social Media Platforms** | | | | |
| Promote engagement via Facebook |  |  |  |  |
| Post regular Instagram Stories |  |  |  |  |
| Produce media-friendly content: articles, podcasts, teaser videos |  |  |  |  |
| Generate updates for institutional donors and partners via Twitter / LinkedIn |  |  |  |  |
| Actively encourage communication via chatbot or website interaction platform |  |  |  |  |
| Facilitate creation of 3rd Party fundraisers (e.g. Facebook / GoFundMe / Fundly) |  |  |  |  |
| Livestream and/or produce regular video content |  |  |  |  |
| **Email Communication** | | | | |
| Welcome communication for new subscribers |  |  |  |  |
| User-friendly communication optimization process for stakeholders |  |  |  |  |
| Consistent email signature strategy for staff |  |  |  |  |
| Open, click-through and unsubscribe rates directly inform your email strategy and ongoing learning |  |  |  |  |
| **Donation Options** | | | | |
| Donation process optimized for both desktop and mobile |  |  |  |  |
| Consistent messaging across all donation portals (e.g. Canada Helps, EchoAge, Fundly) |  |  |  |  |
| *Source: 2020 Nonprofit Communication Trends* | | | | |

Action Steps

**Step 5: Prioritize Your Actions**

**Review** your possible actions from steps 1 to 4. **Choose** 3-5 priorities you will complete in the next 60-Days. **Write** your priority action steps in the space below. **Consider** accomplishing priority action steps 1 and 2 before the end of July and priority action steps 3-5 before the end of August.

|  |  |  |  |
| --- | --- | --- | --- |
| Action Step Priorities | Action Step Description | Before  July 31 | Before  August 31 |
| Priority 1 |  |  |  |
| Priority 2 |  |  |  |
| Priority 3 |  |  |  |
| Priority 4 |  |  |  |
| Priority 5 |  |  |  |

**Step 6: Create Work Plans**

**Create** a work plan for each action step priority. **See** Annex C for an example for a completed work plan

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Work Plan** | | Priority Action Step 1 |  | | | | Date |  |
|  | *Tasks* | | | *Who is responsible?* | *Who will support?* | *Who to consult?* | *By When?* | *Status* |
| 1 |  | | |  |  |  |  |  |
| 2 |  | | |  |  |  |  |  |
| 3 |  | | |  |  |  |  |  |
| 4 |  | | |  |  |  |  |  |
| 5 |  | | |  |  |  |  |  |
| 6 |  | | |  |  |  |  |  |
| 7 |  | | |  |  |  |  |  |
| 8 |  | | |  |  |  |  |  |
| **Key** | | **On Target** | **Delayed** | | **Cancelled** | | **Completed** | |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Work Plan** | | Priority Action Step 2 |  | | | | Date |  |
|  | *Tasks* | | | *Who is responsible?* | *Who will support?* | *Who to consult?* | *By When?* | *Status* |
| 1 |  | | |  |  |  |  |  |
| 2 |  | | |  |  |  |  |  |
| 3 |  | | |  |  |  |  |  |
| 4 |  | | |  |  |  |  |  |
| 5 |  | | |  |  |  |  |  |
| 6 |  | | |  |  |  |  |  |
| 7 |  | | |  |  |  |  |  |
| 8 |  | | |  |  |  |  |  |
| **Key** | | **On Target** | **Delayed** | | **Cancelled** | | **Completed** | |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Work Plan** | | Priority Action Step 3 |  | | | | Date |  |
|  | *Tasks* | | | *Who is responsible?* | *Who will support?* | *Who to consult?* | *By When?* | *Status* |
| 1 |  | | |  |  |  |  |  |
| 2 |  | | |  |  |  |  |  |
| 3 |  | | |  |  |  |  |  |
| 4 |  | | |  |  |  |  |  |
| 5 |  | | |  |  |  |  |  |
| 6 |  | | |  |  |  |  |  |
| 7 |  | | |  |  |  |  |  |
| 8 |  | | |  |  |  |  |  |
| **Key** | | **On Target** | **Delayed** | | **Cancelled** | | **Completed** | |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Work Plan** | | Priority Action Step 4 |  | | | | Date |  |
|  | *Tasks* | | | *Who is responsible?* | *Who will support?* | *Who to consult?* | *By When?* | *Status* |
| 1 |  | | |  |  |  |  |  |
| 2 |  | | |  |  |  |  |  |
| 3 |  | | |  |  |  |  |  |
| 4 |  | | |  |  |  |  |  |
| 5 |  | | |  |  |  |  |  |
| 6 |  | | |  |  |  |  |  |
| 7 |  | | |  |  |  |  |  |
| 8 |  | | |  |  |  |  |  |
| **Key** | | **On Target** | **Delayed** | | **Cancelled** | | **Completed** | |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Work Plan** | | Priority Action Step 5 |  | | | | Date |  |
|  | *Tasks* | | | *Who is responsible?* | *Who will support?* | *Who to consult?* | *By When?* | *Status* |
| 1 |  | | |  |  |  |  |  |
| 2 |  | | |  |  |  |  |  |
| 3 |  | | |  |  |  |  |  |
| 4 |  | | |  |  |  |  |  |
| 5 |  | | |  |  |  |  |  |
| 6 |  | | |  |  |  |  |  |
| 7 |  | | |  |  |  |  |  |
| 8 |  | | |  |  |  |  |  |
| **Key** | | **On Target** | **Delayed** | | **Cancelled** | | **Completed** | |

*Please Note the additional resources in Annex:*

* *Annex A: Crisis Fundraising Assessment*
* *Annex B: 4 Elements of Resource Development*
* *Annex C: Work plan Example*

**Annex A: Crisis Fundraising Assessment Cycle**



© The Saben Group

**Annex B: 4 Elements of Resource Development**



© The Saben Group

**Annex C: Work Plan Example**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Work Plan** | | Priority Action Step 5 | Volunteer Re-engagement | | | | Date | **June** |
|  | *Tasks* | | | *Who is responsible?* | *Who will support?* | *Who to consult?* | *By When?* | *Status* |
| 1 | Assess new volunteer opportunities during current crisis | | | John | Mary & Said | Leadership Team | June 3 |  |
| 2 | Develop volunteer profiles to connect to priority areas | | | Mary | Said | Department Managers | June 10 |  |
| 3 | Update Health and Safety protocols for staff and volunteers | | | Said |  | The City | June 15 |  |
| 4 | Create online training materials for volunteers | | | Carmena | Rachel | Said & Mary | June 20 |  |
| 5 | Send volunteer engagement communication update to all staff | | | ED | Rachel |  | June 22 |  |
| 6 | Send communication update to all volunteers | | | ED | Rachel |  | June 24 |  |
| 7 | Application deadline for new volunteers | | |  |  |  | June 30 |  |
| 8 | Hold volunteer training and orientation | | |  |  |  | July 7 |  |
| 9 |  | | |  |  |  |  |  |
| 10 |  | | |  |  |  |  |  |
| **Key** | | **On Target** | **Delayed** | | **Cancelled** | | **Completed** | |