

FUNDRAISING IN THE TIME OF COVID: CANADIAN-BASED GLOBAL SMOS

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Our Learning Journey



- 1 Explore Crisis Fundraising Opportunities
- 2 Realign Fundraising Goals
- 3 Understand Donor Expectations
- 4 Examine Online Fundraising Practices
- 5 Draft Your Crisis Fundraising Action Plan
- 6 Move Beyond the Workshop

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TASK 1 | Explore Crisis Fundraising Opportunities

- A. On your own, take a few minutes and **recall** 2-3 new fundraising opportunities your organization has pursued since the beginning of Covid-19 restrictions. Briefly **describe** these opportunities in the space below:

New Opportunities We Have Pursued

*We'll **hear** a sample in the large group. What trends do you notice?*

- B. The 2008 “Great Recession” is the most recent example of a sharp economic downturn that affected non-profit and NGO fundraising. Please **listen** to the following summary of what worked well amidst this challenging backdrop:

2008: Fundraising Lessons Learned

1. Re-affirm your Shared Mandate (Values Mission and Vision)

Crises should not shift the *raison d'être* of your organization. Dig-in to your shared mandate and re-focus on how you steward this ‘sacred trust’ in difficult times. Any formal re-articulation of your organization’s foundation should wait until this crisis has passed.

2. Revise your fundraising strategy

The assumptions that underpinned your current strategy have changed. Your strategy must reflect new financial realities. Postpone longer-term initiatives in favour of channels that will stabilize the immediate revenue crisis.

3. Revisit your fundraising targets and plans

Support your revised strategy with new/adjusted fundraising targets and tight deadlines.

4. Reclaim the narrative

Ensure all communication is reflective of the wider context (both needs and opportunities), and how your participants are currently accessing support. Organizational crisis appeals (e.g. we need funds or else...) were generally perceived to be ineffective as many donors wish to avoid contributing to a “sinking ship” scenario.

5. Re-equip your team (staff, board, and volunteers)

Train your staff, board, and key volunteers to support new messaging. Maintain an updated “Frequently Asked Questions” link which reinforces: How participants are

accessing needed support, your creative and adaptive revisions to organizational strategy, and to the new challenges your organization faces.

6. Reach-out to donors and partners

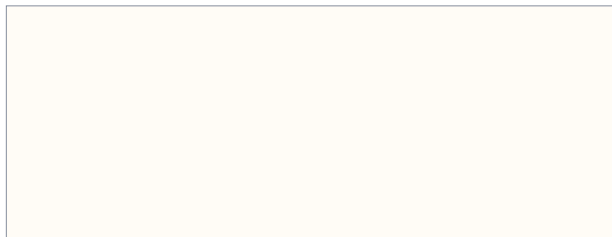
Donors and partners want to help you address challenges. Initiate transparent and consistent communication about the impact of the crisis. Thank them for their concern and support while identifying opportunities for their input, involvement, and donations.

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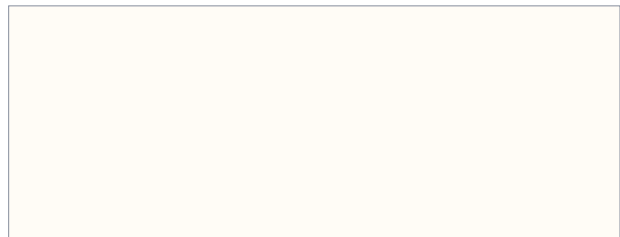
C. In breakout groups,

- **Introduce** yourself to the group by stating your name, location, and your role with the organization you represent.
- **Discuss** the following questions about Fundraising Lessons Learned from Task 1B:
What stands out as being the most helpful insight for the Covid-19 era?
What lessons learned would you add to (or challenge from) this list?
- **Nominate** a volunteer to report back to the large group.

Insights from Our Group



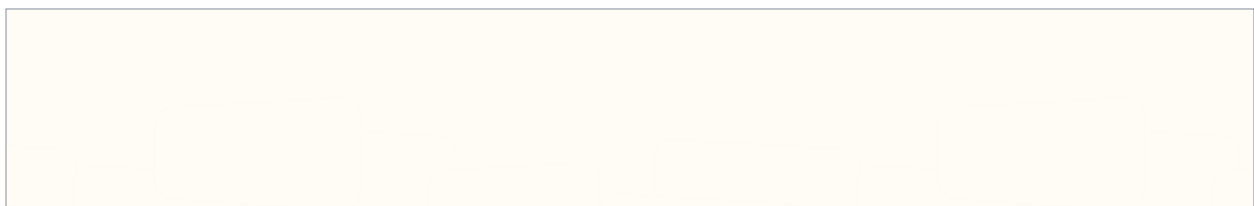
Insights from Other Groups



We'll **hear** a short report from each group.

- #### D. On your own, **consider:** *What insight or idea could lead your own team to significant impact for your organization's fundraising in 2020?*

High Impact Discussion Point



Breakout Rooms

Invite one group member to “Share Screen” for the Lessons Learned summary from Task 1B to draw upon during your discussion.

TASK 2 | Realign Fundraising Goals

- A. Establishing your 2020 fundraising goals required thoughtful dialogue and discussion. None of us built our fundraising models anticipating a global pandemic.

Review the comments we collected from participants via the pre-workshop survey.

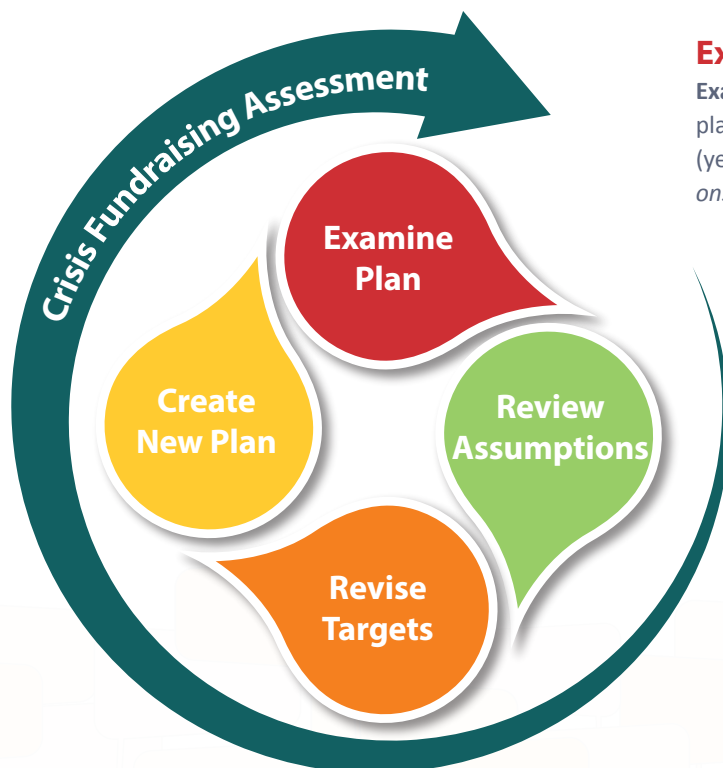
What similarities and differences do you see? What would you add?

Jot down any ideas that resonate with your own organization's situation:

Our Organization's Unique Fundraising Challenges (in light of Covid-19)

- B. *How do we test the crucial assumptions embedded with our fundraising plans?*

Consider the "Crisis Fundraising Assessment" tool below:



Examine Plan

Examine your organization's current 2020 fundraising plan. **Calculate** actual revenue against target revenue (year to date). *Pay attention to performance since onset of pandemic restrictions.*

Review Assumptions

Review the assumptions and commitments for each of your top 10 pre-pandemic revenue sources. **Affirm** or **adjust** these assumptions and commitments.

Revise Targets

Revise revenue targets for the remainder of the year based on new assumptions and current plan performance trends.

Create New Plan

Create new fundraising plan, informed by new targets.

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What are your questions or comments?

- C. In your breakout groups, **examine** the following case study for the NGO Caring Canadians International. **Identify** the actions you would recommend as they realign their fundraising targets for the second half of 2020.

Caring Canadians International (CCI)				
Fundraising Target Summary		Approved:		December 2019
		Reassessed:		June 2020
Funding Source	Projected Revenue	Original Assumptions	Revised Assumptions	Possible Action Steps
Jim Horton's Foundation	\$150,000	<ul style="list-style-type: none"> Long-standing donation (10+ years) 	We have received this year's donation	<ul style="list-style-type: none"> No action for this year In Sept, reaffirm commitment for 2021
GAC (Healthy Hearts Project)	\$105,000	<ul style="list-style-type: none"> Last year of funding agreement 	Final payment due Sept 2020	
Dr. J. Smith	\$45,000	<ul style="list-style-type: none"> 1st time donor pledge 	Received 50% of 2020 pledge	
Harvest Gala	\$35,000	<ul style="list-style-type: none"> Annual Event 	Cancelled	
Monthly Donor Program	\$30,000	<ul style="list-style-type: none"> 2.5% growth from 2019 	5% cancellation since pandemic	

Note: Caring Canadians International (CCI) is a fictitious NGO for case study purposes.

We will **hear** a sample of "Possible Action Steps" in the larger group when we return in 5 minutes.

- D. On your own, **apply** the “Crisis Fundraising Assessment” to your own organization by completing the chart below. You will have 5 minutes to draft some initial ideas for this assessment.

Organization's Name:				
Fundraising Target Summary			Approved:	
			Reassessed:	
Funding Source	Projected Revenue	Original Assumptions	Revised Assumptions	Possible Action Steps

TASK 3 | Understand Donor Expectations

- A. **Consider** the following advice from non-profit fundraising author Kim Klein:

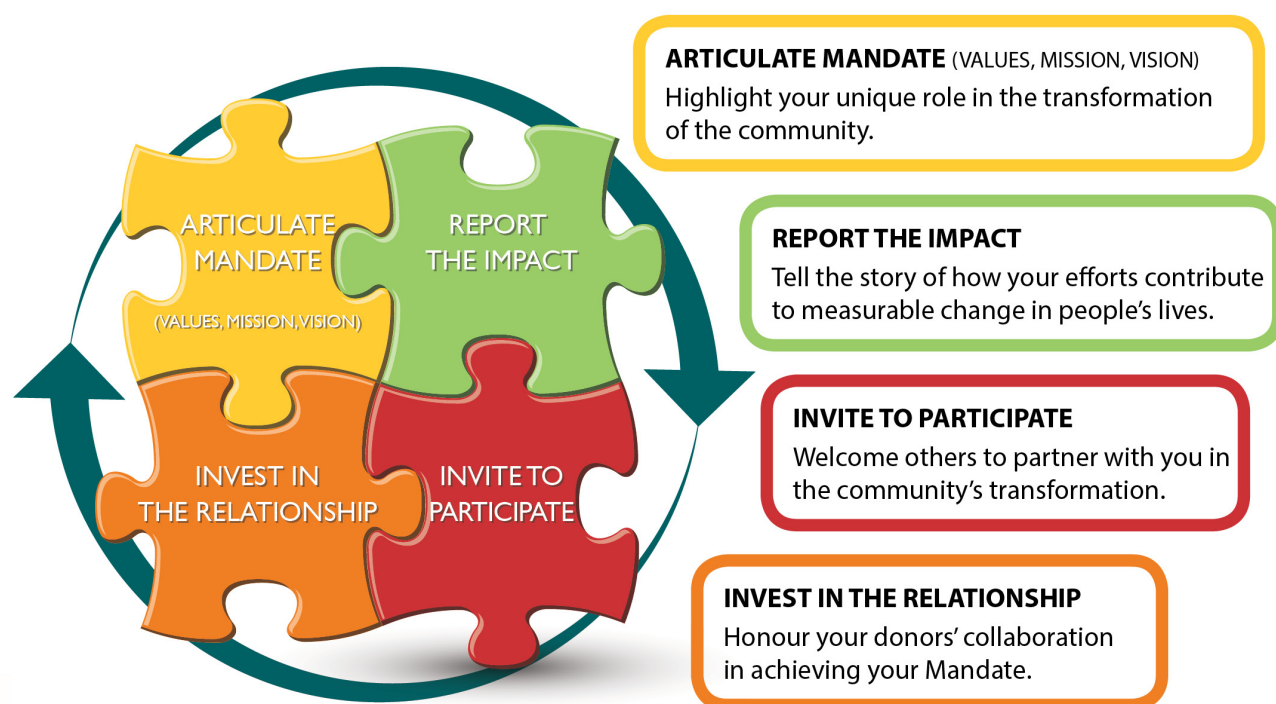
“An organization needs to see its donors as the equivalent of family and friends – they take time, they have their idiosyncrasies, some of them are very different from you, but they are worth getting to know: they make your work possible.”

Kim Klein: Practical Ways to Build Relationship with Donors

What stands out for you?

*We will **hear** a sample from the group.*

- B. **Listen**, as your facilitator introduces our 4 Elements of Resource Development.



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What are your observations or questions about these 4 elements?

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

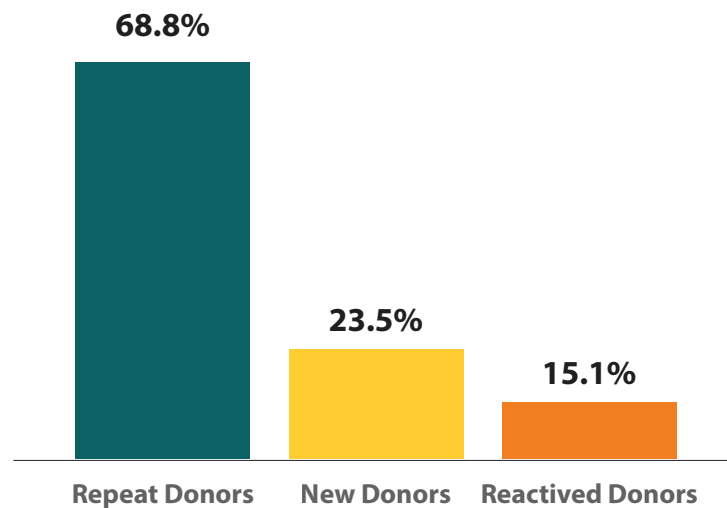
Key Elements	Tools, Initiative and Systems	Implemented Pre-pandemic	Reviewed, Updated or Created
Articulate Mandate	Statements of Values, Mission and Vision that shape our decision-making and communications	<input type="checkbox"/>	<input type="checkbox"/>
Report the Impact	Up-to-date cost/participant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

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

Action Steps

- C. **Reflect** for a moment on the info graphics from the Canadian Fundraising Effectiveness Project (2019).



Donor Retention Rates (2018-2019)

Source: Fundraising Effectiveness Project (Canada)

What insights or question do you have?

How does this resonate with your experience?

Donor Retention Research

The average donor retention rate – that is, the percentage of donors who gave in 2018 and then again in 2019 – was 50.8 percent. But there is a significant difference between new donors and repeat donors. Less than a quarter (23.5%) of brand new donors (those who gave to a charity for the first time in 2018) gave again in 2019. However, 68.8% of repeat donors (those who have given before 2018) gave also in 2018 and 2019.

Canadian Giving Report (2019): Charities Aid Foundation

- D.** Below you will find a summary of donor retention “good practices.” **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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clear presentation of how donor funds are being spent and current need for funds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regular opportunity for donors to express or update preferred method / frequency of communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plan for opportunities for engagement beyond financial investment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pro-active management of organizational reputation in public sphere (e.g. media stories, endorsements from public figures)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clear benchmarks for response time to donor questions or requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Updates on innovation, learning and the organization’s strategic adaptation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compelling project impact metric reporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Take a moment and **capture** 3-5 potential action steps based on the checklist above.

Action Steps

What additional practice(s) have you found fruitful within your own organization?



TASK 4 | Examine Online Fundraising Practices

A. Call to mind a successful “viral” online fundraising campaign such as:

- Ice Bucket Challenge (ALS Society)
- Movember (Men’s Health causes)

What stood out for you about these fundraising campaigns?

What contributed to their success? What are some limitations?

Type your responses using the chat feature.

*We’ll **discuss** in the large group.*

B. Consider the following charitable giving trends in Canada:

Snapshot of Recent Research

- International development is the 4th largest donor cause and this is growing, especially for emergency relief (Imagine Canada, CanadaHelps)
- Online giving is growing at 3 times the rate of overall giving, with mobile outpacing desktop (Giving Canada)
- More SMOs are encouraging donors to give specific amounts to micro-projects (NCFA)
- Non-profits are generally not adopting best practices for e-mail and social media (Nonprofit Marketing Guide)
- 91% of Canadians are internet users; 93% have mobile subscriptions; and (pre-pandemic) 66% have purchased online. (KCI)
- 34% of Canadians reported giving online in the past year (CAF)

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Tools and Guides

We have curated a list of Tools and Guides that will support you as you delve deeper into online fundraising. You will find these resources in Annex A.

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

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

Source: 2020 Nonprofit Communication Trends

D. What 3-5 potential action steps do you think you should research considering your current fundraising?

Action Steps



TASK 5 | Draft Your Crisis Fundraising Action Plan

- A. **Consider** the Action Plan for this workshop.
- B. On your own, **review** and **add** to the work you have drafted during the workshop.

What are your comments or questions? Send a “chat” note to your facilitators if you would like input or clarification about your next steps.



TASK 6 | Move Beyond the Workshop

- A. Together, let’s **reflect** on our learning journey today and the next steps timeline.

Note: *One-on-one coaching and feedback on your action plan is offered to each participant.*

- B. **Join** with us as we engage in a closing reflection of our time together.

ANNEX A | Curated Tools and Source Information

Tools for Crisis Fundraising Responses

[Beginners Guide to Email Appeals](#)

[Basics of Email Marketing for Non-profits](#)

[End of Year Fundraising Toolkit](#)

[Best Use of Special Events](#)

[Creating Virtual Fundraising for Canceled Events](#)

[Peer-to-Peer Fundraising \(Example from Plan\)](#)

[Guide to Online Fundraising Resources](#)

[Big Social Media Guide for NonProfits](#)

Source Information for Crisis Fundraising Responses

TASK 1: 2008: GREAT RECESSION LESSONS LEARNED

[10 Strategies for Recession Fundraising](#)

[2008: The Lessons Learned and Applying them Today](#)

[Fundraising in a Time of Crisis: Lessons from History](#)

[Seven Lesson from the Great Recession of 2008 that Apply Today](#)

[What Fundraisers Can Learn from the Great Recession](#)

TASK 3: DONOR RETENTION RESOURCES

[Individual Donor Benchmark Report](#)

[10 Strategies for Recession Fundraising](#)

[Canada Giving Report 2019 \(CAF\)](#)

TASK 4: ONLINE FUNDRAISING

[Fundraising in 2020 and Beyond](#)

[What to Expect in the Social Fundraising World](#)

[Imagine Canada: 360 Sector Stats](#)

[Quarterly Report \(Fall 2019\) Association of Fundraising Professionals](#)

ANNEX B | Acknowledgements

PROGRAM DESIGN

This work was specifically created for SPUR Change and its partners by W. Clayton Rowe and Hugh T. Brewster (saben.ca), and David Kupp (kabisa.ca)

WORKBOOK LAYOUT

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