Fundraising in Times of Crisis

How to Seek Help When You Need a Lot of It

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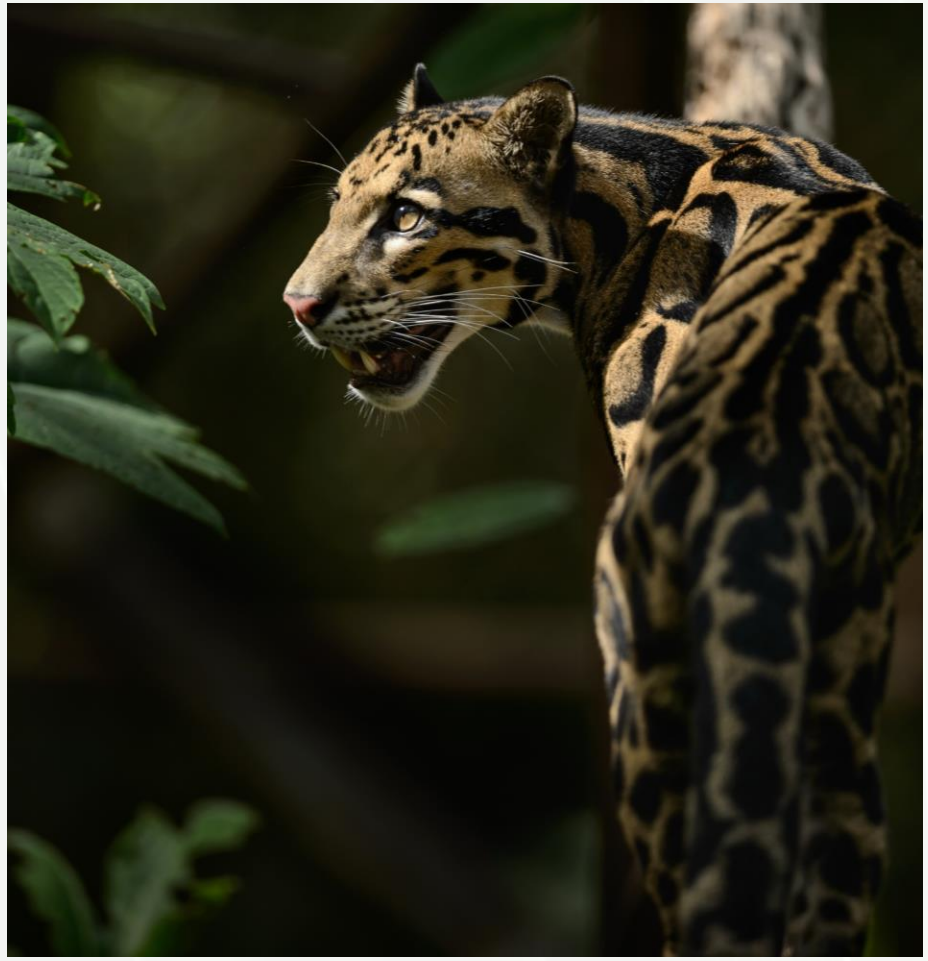
RAISE THE BAR
CONSULTING

Poll:

Who is in the Room?

Nonprofits are Facing Trying Times (to say the least).

How are your fundraising activities evolving to meet the challenge?



It’s time to…

Take Risks.
Be Bold.
Be Fearless.
Laser Focus on
Fundraising Success.

Group Breakout

(5 mins.)

Share a strategy you used to raise funds quickly in a time of crisis.

Need Quick Cash?

Unicorn Funder/Investor

Crowdfunding Campaign

Public Call for Support

Is your need systemic?

Do you seek sustainable income?

Using the Nonprofit Lifecycles Framework, what stage is your fundraising program?

IDEA PHASE

START UP

GROWTH

MATURE

DECLINE

TURNAROUND

EXIT

Understand Your Fundraising Lifecycle.

Use Where You Are to Get Where You're Going.

START UP

Your org is just starting to focus on fundraising.

CRM: None, just got one, or you have one but are not using most of the features.

Appeals/Campaigns: 0-2 per year.

Major Donor Meetings: 2 or less monthly.

Events: None, or this is pretty much all you do (No other fundraising).

Corp/Foundation: Write a few annually, or your only FR activity is writing proposals.

Board Fundraising: No formal program, maybe 1-2 Board/Founders keep the org funded.

Social Enterprise: Thinking about it!

GROWTH

More fundraising than in start-up phase

CRM: Use several features and have integrated other platforms for org efficiency.

Appeals/Campaigns: 3-4 ***multichannel*** fundraising appeals/campaigns per year.

Major Donor Meetings: 3-5 monthly.

Events: 0-2, evaluated for return on investment.

Donor Cultivation: some efforts.

Corp/Foundation: Turn-key program with a volume of funder meetings and proposal submittals.

Planned Giving: Put Gift Acceptance Policies in Place, begin evergreen marketing.

Board Fundraising: Formal campaign, Board give/get procedures established.

Social Enterprise: Onboarding ideas..

MATURE

Your fundraising program is rocking!

CRM: Use almost all features, conduct reporting and analysis, integrated systems.

Appeals/Campaigns: 6 or more ***multichannel*** campaigns annually, including segmentation.

Major Donor Program: 5+ meetings monthly. Includes moves management and middle donor strategies.

Events: 0-2, evaluated for return on investment. Integrated into donor cultivation and recognition strategies. .

Donor Cultivation: Robust turnkey program to build relationships and reward giving.

Corp/Foundation: Turn-key program with a volume of funder meetings and proposal submittals.

Planned Giving: Full program is in place, including lead generation, acquisition, and management strategies.

Board Fundraising: Formal campaign, Board give/get procedures established.

Social Enterprise: Some orgs have built profitable social enterprise strategies by this phase.

DECLINE

Something has affected the strength of your fundraising program. ***This can happen at any time***.

CRM: Disrupted use or conversion to another CRM reduced functionality.

Appeals/Campaigns: Reduced to <4, abandoned ***multichannel*** fundraising and/or segmentation.

Major Donor Program: Stopped meeting with donors or meet with fewer donors than in past..

Events: Refusal to let go of events that don't serve you. Double down on failed events.

Donor Cultivation: stopped conducting certain efforts but didn't replace them.

Corp/Foundation: Reduced or eliminated proposal writing and funder meetings.

Planned Giving: Dialed back efforts for one reason or another.

Board Giving: Your Board has reduced its fundraising expectations.

TURNAROUND

A changemaker notices things are "off" and becomes a catalyst for change. ***This can happen at any time***.

CRM: Resurrect full functioning and integration with internal systems.

Appeals/Campaigns: Onboards a plan to return to more robust campaigning.

Major Donor Program: Reassigns portfolios and resurrects in-person fundraising with middle and/or major donors.

Events: Leads the charge to (re)evaluate events for ROI, CDR and opportunity costs.

Donor Cultivation: Reinvigorates with new strategies and efforts.

Corp/Foundation: Returns to a systemic program of relationship-building and proposals.

Planned Giving: Refocuses effort and onboards promotional strategies.

Board Giving: The Board revisits its expectations and resurrects give/get strategies.

Help is out there!

Fundraising Assessments & Health Checks

Hire for Fundraising Lifecycle

Invest in Your Fundraising Program

Consultant & Fractional Support

Take a Fundraising Health Check

Review each core fundraising program areas.

What do you need to focus on first? Do you need help?

Hire for Fundraising Lifecycle

Prioritize skills you need to elevate your program to the next step.

Invest in Your Fundraising Program

Dedicate resources to grow. Include funds to pay for talent, professional development, Board training, donor engagements.

Activate Your Board

Turn your board into ambassadors to open doors and connect your group with high net worth (HNW) philanthropists.

Consultant Support

Third-party help can give you an objective review and guidance.

You pay staff with philanthropic dollars.

Work Smarter.
Resource Wisely.

Curate Your Team for Success.

Determine the volume of work for each fundraising area, the strengths of your current team, the amount of talent you need, at the price you can afford.

Staff up where it makes sense.

Outsource to supplement talent.

Fractional Development Support can optimize talent.

A full-time salary can overpay per hour if the person is disproportionately tasked with work that is typically compensated at a lower level.

Fractional Staffing almost always costs less than hiring a full-time worker at the same level.

Fractional Staffing Results

- Dev Directors, gift officers, event planners, foundation/gov grant writers, capital campaigns.
- Very often, a fractional staff member outperforms full-time staff in actual and proportional funds raised.
- ROI Improves. (For ex: RTB clients see a 10:1 to 30:1 ROI on their spend, surpassing 4:1 national average and lower ROIs at many organizations).
- Money saved / Budgeting pressure reduced.
- Organizations can reinvest expenses in mission or grow reserves.
- Orgs now has specialized, experienced staff for specific tasks but are not “overpaying them” due to title/market compensation for the rest of the tasks on their plate.
- Frees up resources to add a lower paid full-time staff in positions better suited for agency needs.
- Optimizes organizational functions and resources.
- Reduces over purchasing for the market.
- Reduced human resource issues.

Do More to Raise More.

Now, some quick fundraising hacks!

Get unstuck and get moving!

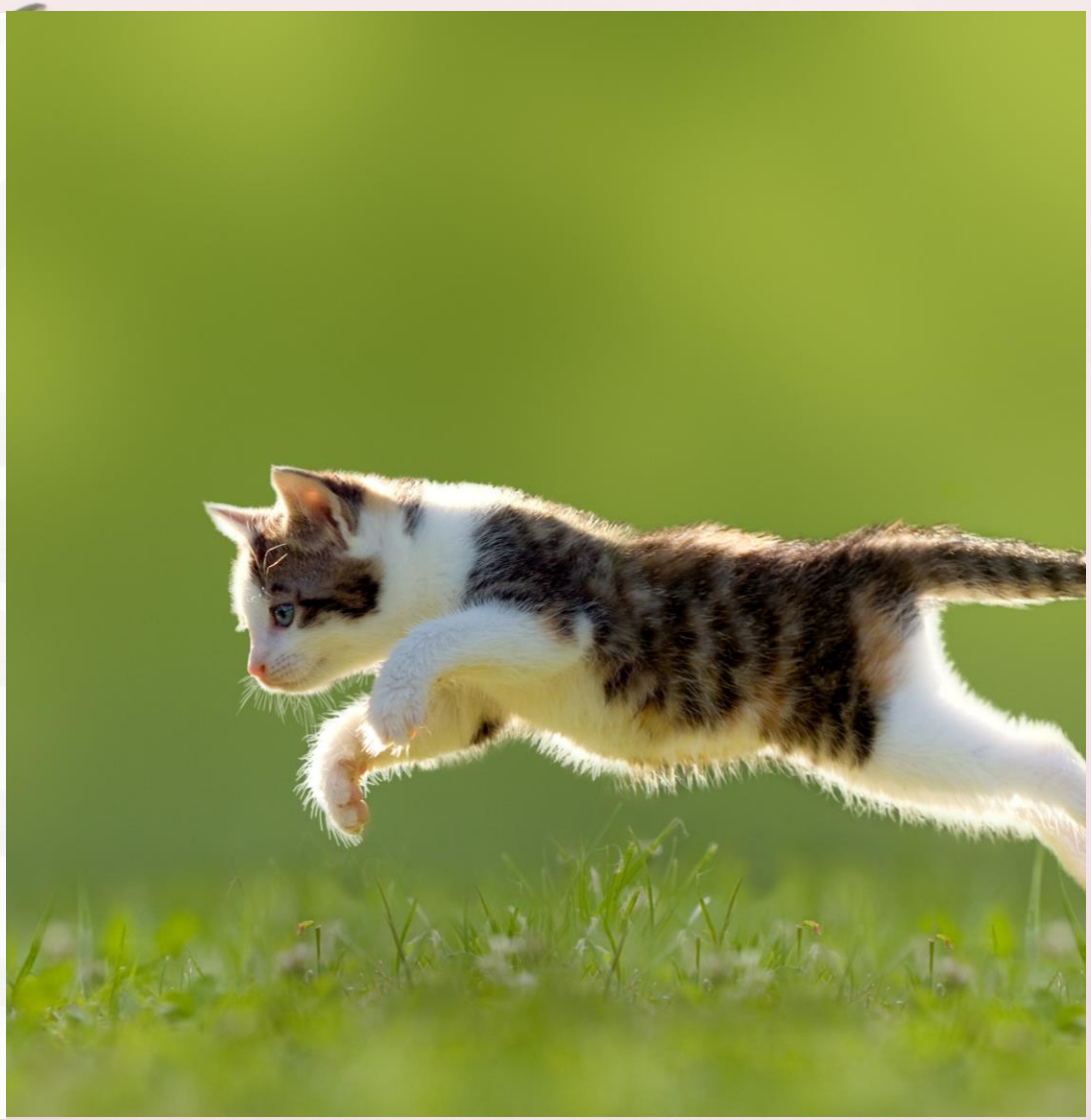
Turn meetings into messages.

Take the pulse of your stakeholders.

Speak to donors.

Drive around the speedbumps.

Jump Start Your Annual Giving



Boost Annual Giving (Open Your Funnels!)

- Implement at least 4-6 campaigns annually. No segmentation, send to everyone.
- Onboard text-to-give, peer-to-peer, and voice broadcast channels if you don't already have them. Integrate them into campaigns.
- Bring mail back if you abandoned it (strategically, of course). Send to donors in last 48 mo.
- Add crowd funding and social/web ad opportunities.
- Identify known middle donors ($1,000-$9,999) and major donors ($10,000+). Make this your donor cultivation short list. Add 2-4 VIP activities for mid/major donors.
- Run your data through analytics to identify HNW potential/current donors hiding in plain sight. Add them to your cultivation list.

Jump Start Your Donor Cultivation

Donor Cultivation & Engagement

- Onboard different first donation, second donation, and win back acknowledgement packages.
- Calendar at least two (2) VIP activities for middle ($1000+) and major (10,000+) donors.
- Onboard or resurrect your Board thank you call/text effort. Do it at Board meetings so it actually gets accomplished.
- Send holiday texts/cards/gifts to middle/major donors.
- Follow / invite donors on social media channels. Feature them in posts, videos, e-news.
- Send donors short mission-centric videos via text.

Jump Start Your Corporate & Foundation Giving

Boost Corporate/Foundation Giving

- Prospect for corporate and foundation leads. Build an annual calendar.
- Identify your top three fundraising needs/programs.
- Create case statement / proposal templates for each need/program.
- Look three months out and begin to contact companies and foundations to build relationships or visibility. Level up by engaging Board members as ambassadors with company/foundation VIPs.
- Churn proposals monthly.

Start Your Planned Giving Program

Start Your Planned Giving

- Establish Gift Acceptance Policies.
- Develop evergreen ads/messaging.
- Identify donors who made gifts in at least 7 consecutive years (at any level) and begin targeted legacy messaging.
- Hold an annual Make A Will Seminar.

It can work for you!

Org #1: 50-year-old 96% government funded agency "never did" fundraising

- Hired a consultant / contractor to grow annual individual giving and CFN giving.
- In three years, grew budget by 270%, and transformed revenue to 60% government/40% private.
- With ED/Board Coaching, started and ended a capital campaign "in 1 day" with large gift.
- Average spend of $30,000 annually.

Org #2: Mature fundraising shop with an underperforming grant writer.

- Onboarded a part-time contractor to replace full time staff position.
- Increased from 1 to 10 submittals monthly.
- Raised $450K more in one year.
- Cut staff costs by more than half to make better use of mission resources.

Org #3: *Nonprofit needed a fundraising overhaul.*

- Conducted a development assessment.
- Implemented annual giving, capacity building, and donor cultivation recommendations for two years.
- Saw a lift in giving from current donors by 38% in year 1.
- In two years, tripled their giving from individuals and raised their overall budget by 40%.

Org #4: *Nonprofit facing closure.*

- Made a public call for funds “or else” closure (highly effective but questionable by some).
- Raised enough money to buy themselves 6 months of continued operations.
- In early stages of developing a robust fundraising program.
- Time will tell.

There are many more examples of organizations that transformed their revenue and sustainability by doing more and being fearless.

Questions, Thoughts?

RAISE
THE BAR

Thank you

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