



MOVING FORWARD

Adapting for Success and Planning the Next 100 Days



TODAY'S PRESENTERS



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COVID-RELATED FUNDRAISING EVOLUTION



I. IMMEDIATE CRISIS

CHARACTERISTICS:

- Chaotic
- Urgent
- Fast moving while immobile

AREAS OF FOCUS:

- Continued Operations
- Special Appeals



II. STABILIZATION

CHARACTERISTICS:

- Methodical and slowing
- Planful

AREAS OF FOCUS:

- Program modifications
- Stakeholder engagement



III. RE-EMERGENCE

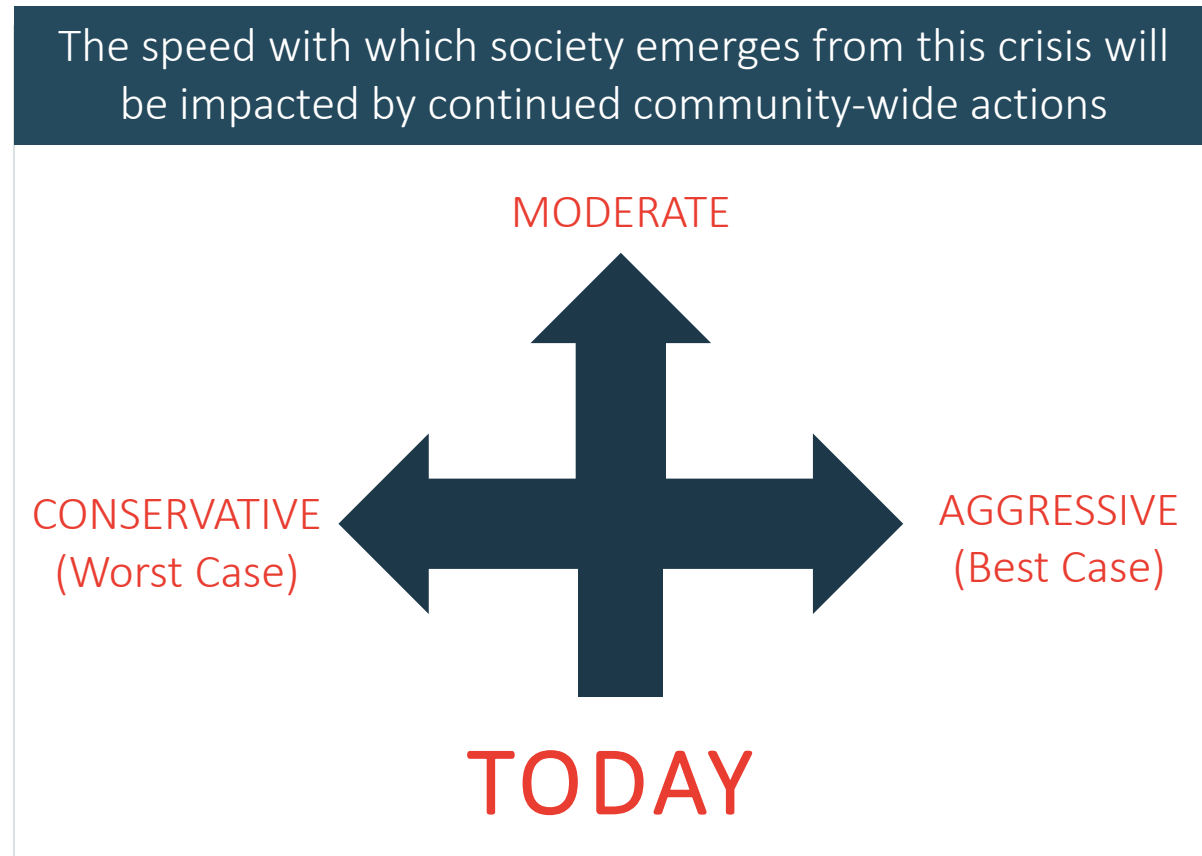
CHARACTERISTICS:

- Resembling pre-COVID

AREAS OF FOCUS:

- Campaigns and fundraising plans
- Metrics and evaluation

RE-EMERGENCE SCENARIOS



KEY CONSIDERATIONS

- Some of the most Aggressive models predict a **beginning of re-emergence during Q2 of 2020**
- More Conservative models suggest that **real re-emergence will not happen until Q2 of 2021**
- Your own organization will have to **consider sector-specific and region-specific elements** to craft your own scenario plans

SCENARIO PLANNING

HOW TO EVALUATE: "WHAT IF..."



Gather key decision makers, including a trusted Board member or two



Identify critical streams of philanthropic revenue over the next 6-9 months (e.g., major gifts, grants, fall events, fall appeals)



Identify a best case, worst case, and middle ground scenario that applies to your sector, and organizational dynamics



Assign primary decision-makers for each revenue stream

CONSIDERATIONS FOR FUNDRAISING IN THE NEW ENVIRONMENT



PLANNED ACTIONS AND APPROACH

UPCOMING ACTIONS



30 - DAY



60 - DAY



100 - DAY



CASE

Rationale behind the initiative – the “why”



LEADERSHIP

Those who advocate for the cause



PROSPECTS

Organization’s natural constituency



PLAN

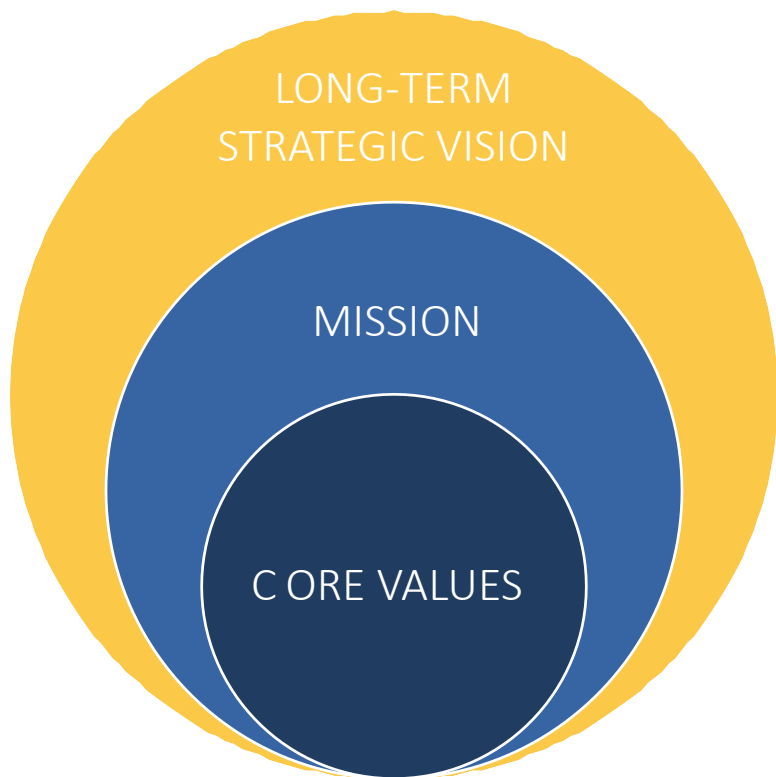
Strategy and tactics for campaign

PLANNED ACTIONS AND APPROACH

30 - DAY

60 - DAY

100 - DAY



| TASK | OWNER | Month 1 | | | | Month 2 | | | |
|--------------------------|-----------------------------------|-------------|---------|----|----|---------|----|----|----|
| | | 6 | 13 | 20 | 27 | 4 | 11 | 18 | 25 |
| Case for Support | | | | | | | | | |
| 1 | Add COVID-19 priorities | All | ✓ | | | | | | |
| 2 | Build consensus on enhanced Case | All | ✓ | | | | | | |
| 3 | Share Case with leadership | All/JGH | | | | | | | |
| 4 | Develop newsletter | SF/CB/AM/DH | ongoing | | | | | | |
| 5 | Young Scholar stories/experiences | AM/DH/AD | U | | | | | | |
| Industry Requests | | | | | | | | | |
| | | MW/AM/NK | ongoing | | | | | | |
| | | NK | | ✓ | | | | | |
| | | NK | | | ✓ | | | | |
| | | NK | | | | | | | |
| | | NK | | | | | | | |
| | | NK | | | ✓ | | | | |
| Member Phase | | | | | | | | | |
| 1 | Collecting stories | SF/CB | ongoing | | | | | | |
| 2 | Early messaging | All | | U | U | | | | |
| 3 | Build infrastructure | MW/All | ongoing | | | | | | |
| 4 | Develop timeline | AM/DH | | U | U | U | | | |
| 5 | Determine request mediums | AM/DH | | | U | | | | |

ACC Long-Term Giving Goals

COVID-19 Rapid Response

ACC/F Members

The Campaign for the Future

WEEKLY UPDATE - LOOKING BACK / LOOKING AHEAD

ACCOMPLISHMENTS & ACTIONS

- ✓ Finalized foundation prospects sheet and assigned leads
- ✓ Staff call to align on immediate campaign priorities
- ✓ Finalized COVID-19 industry proposal
- ✓ Drafted integrated enhanced Case for Support slide deck
- ✓ Finalized all content for monthly update “newsletter”
- ✓ Created long-form Membership Division outline

PRIORITIES

- All
 - Approve final integrated Case for Support slide deck
- Staff A
 - Continue building blocks of Member Division Guide
 - Plan collateral and timeline for public requests
 - Research cost of Member Division mailing
- All
 - Brainstorm special outreach from leadership
 - Plan content for Thank You Thursday
- Staff B
 - Continue Industry outreach and proposal submissions



Q&A

THANK YOU!

For more resources on the impact of COVID-19 on philanthropy, visit <https://ccsfundraising.com/strategies-during-covid-19/>

To learn more about CCS Fundraising, visit us at <https://ccsfundraising.com/>

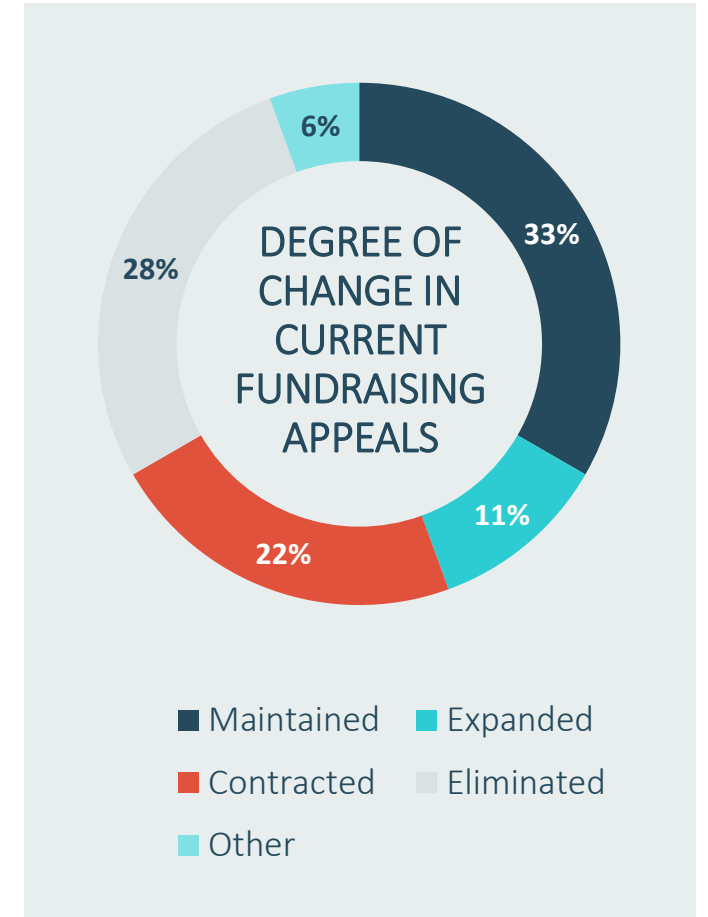
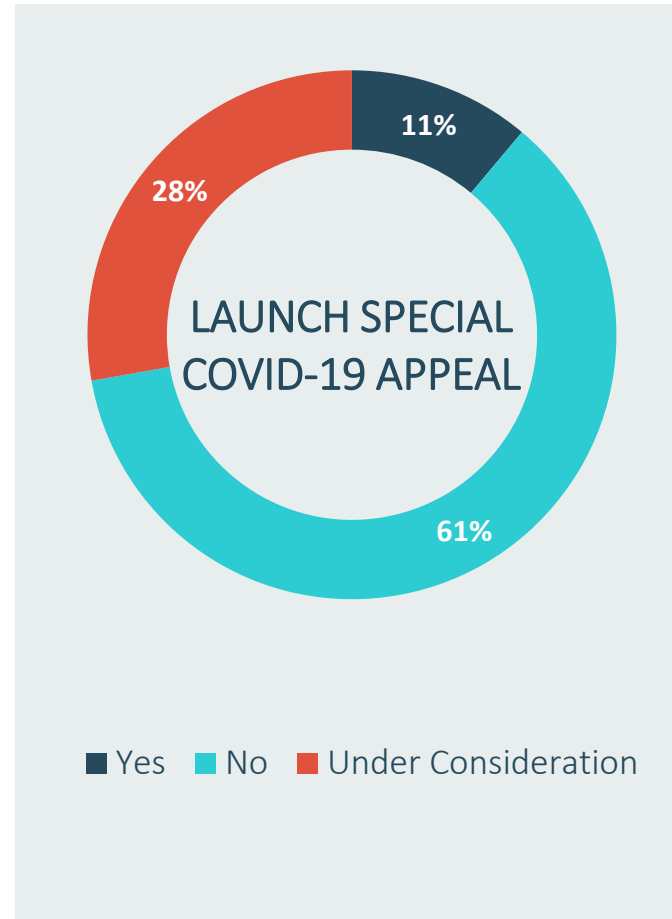


APPENDIX



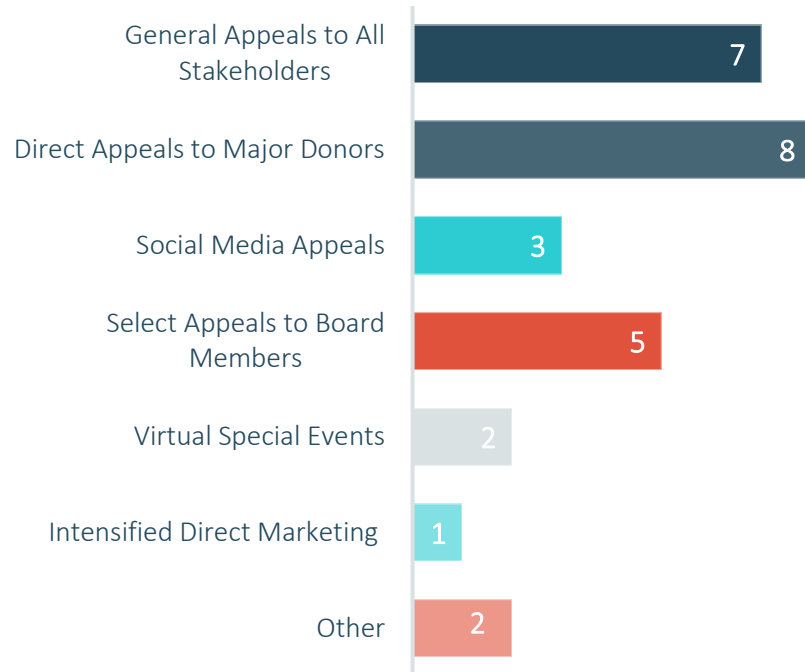
CCS distributed a **Philanthropic Climate Survey**.

We are sharing a snapshot of responses from 18 Association participants.

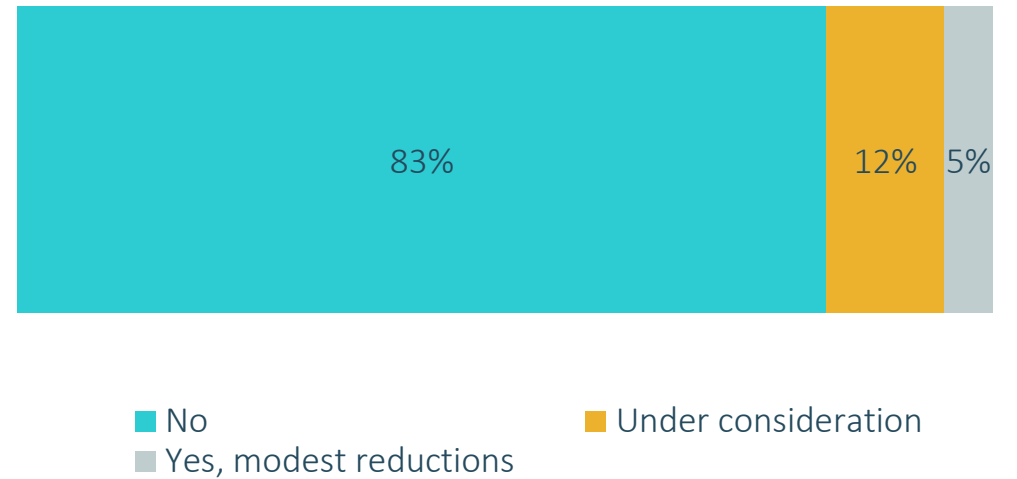


APPENDIX

PRIMARY SOURCES OF CURRENT SUPPORT



FUNDRAISING STAFF LAYOFF/FURLOUGH



APPENDIX: CCS COVID-19 GUIDELINES



Increase
Communication



Communicate the
Immediate and
Short Term
Financial Impact



Consider Special
Fundraising
Initiatives



Consider Special
Briefings



Avoid Wholesale
Cancellation of
Fundraising Plans



Show Empathy
and Concern
for Your
Stakeholders



Develop a
Short-Term
Action Plan



Leverage
Technology



Increase Activity



Reaffirm Your
Mission and
Impact

APPENDIX: CARES ACT FROM A DONOR PERSPECTIVE

High-Impact Opportunities

- All taxpayers can deduct up to \$300 for qualified charitable contributions made in 2020 and beyond, including those using the standard deduction
- For itemizers (accounting for nearly all taxpayers with an income of \$200,000+), the amount of charitable giving deductible is raised to 100% of AGI for 2020
- Gifts to DAFs and private foundations do not qualify for these provisions, but remember...
 - **Keep lines of communication open with foundation partners.** Foundations are still required to make their minimum 5% distribution.
 - **Talk to donors with DAFs first.** Gifts from those funds won't impact donors' current financial situation

Potential New Challenge

- Required Minimum Distributions from IRAs and 401(k) plans (at age 72) are suspended for tax year 2020. **Communicate early and directly with donors who give through a charitable rollover.**

Other Special Opportunities

- Provision for real estate investors to use depreciation of real estate holdings to offset capital gains earnings, in effect lowering investors' overall federal taxes this year
- The CARES Act raises the amount of charitable giving that corporations can deduct from 10% of taxable income to 25% of taxable income