MOVING FORWARD

Adapting for Success and Planning the Next 100 Days

Association Foundation Group
TODAY’S PRESENTERS

**Marthea Wilson**  
Director of Membership  
American College of Cardiology

**Aly Mennuti**  
Assistant Vice President  
CCS Fundraising

**Luke Driscoll**  
Managing Director  
CCS Fundraising
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

The speed with which society emerges from this crisis will be impacted by continued community-wide actions

CONSERVATIVE (Worst Case)  MODERATE  AGGRESSIVE (Best Case)  TODAY

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


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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

CASE
Rationale behind the initiative – the “why”

60 - DAY

LEADERSHIP
Those who advocate for the cause

PROSPECTS
Organization’s natural constituency

100 - DAY

PLAN
Strategy and tactics for campaign
# PLANNED ACTIONS AND APPROACH

## 30 - DAY

**CORE VALUES**

**MISSION**

**LONG-TERM STRATEGIC VISION**

## 60 - DAY

**ACC Long-Term Giving Goals**

**COVID-19 Rapid Response**

**ACC/F Members**

**The Campaign for the Future**

## 100 - DAY

**Core Values**

### Mission

**Long-Term Strategic Vision**

<table>
<thead>
<tr>
<th>Month 1</th>
<th>Month 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task 1</td>
<td>Task 2</td>
</tr>
<tr>
<td>Task 3</td>
<td>Task 4</td>
</tr>
</tbody>
</table>

### Core Values

- **Vision**
- **Goals**
- **Values**

### Mission

- **Strategic Plan**
- **Strategy**
- **Goals**

### Long-Term Strategic Vision

- **Vision and Strategy**
- **Goals and Objectives**

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**CORE VALUES**

**MISSION**

**LONG-TERM STRATEGIC VISION**

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**ACC Long-Term Giving Goals**

**COVID-19 Rapid Response**

**ACC/F Members**

**The Campaign for the Future**

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**PLANNED ACTIONS AND APPROACH**

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**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
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

<table>
<thead>
<tr>
<th>Source</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Appeals to All Stakeholders</td>
<td>7</td>
</tr>
<tr>
<td>Direct Appeals to Major Donors</td>
<td>8</td>
</tr>
<tr>
<td>Social Media Appeals</td>
<td>3</td>
</tr>
<tr>
<td>Select Appeals to Board Members</td>
<td>5</td>
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<tr>
<td>Virtual Special Events</td>
<td>2</td>
</tr>
<tr>
<td>Intensified Direct Marketing</td>
<td>1</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
</tr>
</tbody>
</table>

FUNDRAISING STAFF LAYOFF/FURLOUGH

- No: 83%
- Yes, modest reductions: 12%
- Under consideration: 5%
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
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.