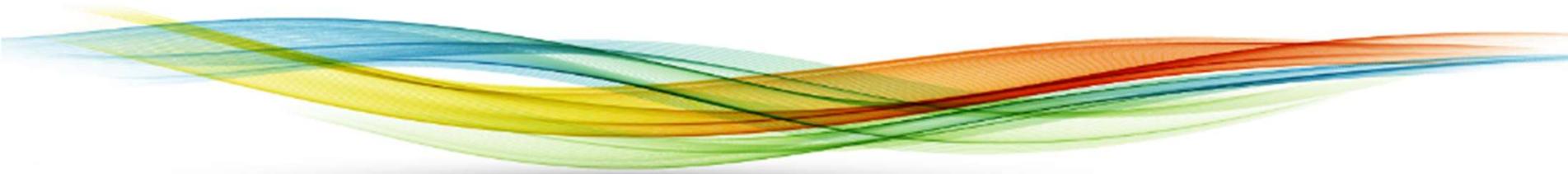




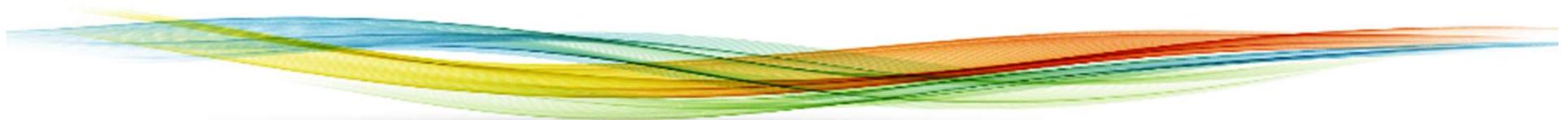
FIELDSTONE LEADERSHIP
NETWORK
Fundraising in Uncertain Times
March 2020



AGENDA

This session will help you build confidence in the following ways:

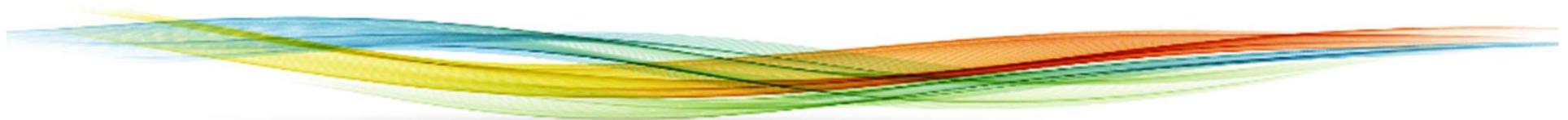
- The new paradigm: tips for working remotely
- Using these times as an opportunity to pivot
- Having an opportunity mindset
- Preparing for Virtual Engagement
- Doing the right things during times of challenge



REFLECTION

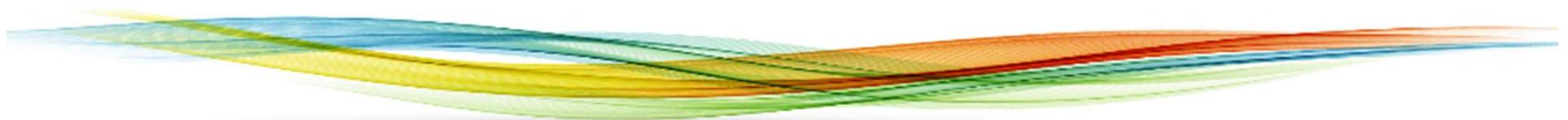
“Step thru new doors” ~ Unknown

“Opportunities are like sunrises. If you wait too long, you miss them” ~ Unknown



WHAT WE HAVE LEARNED FROM OUR PAST

- Those that saw a connection with us during hard times (9/11; Recession of 08/09) upped their giving
- Those that felt ignored or “as good as out least check” moved on to other organizations
- Organizations that respected where their donors were saw increased giving
- Legacy giving can also increase





THE NEW PARADIGM, WORKING FROM HOME

TIPS FOR WORKING FROM HOME

- Take a shower in the morning
- Take a walk first thing (or walk during a conference call)
- Find a dedicated workspace
- What is your one big rock?
- Reach out to a friend or co-worker at least once a day
- Stick to a routine
- Utilize calendar blocking
- Schedule your internet surfing
- Use your lunch break for “me” time
- Set a “quitting time”

BUILDING A DAY FOR FUNDRAISING

- 2 Touches first thing
- Focus on your mission
- Get personal
- Calendar blocking:
 - Team check in call
 - Strategy
 - Donor calls/outreach/engagement
 - Writing or other
 - Social versus quiet



USING THESE TIMES AS AN OPPORTUNITY TO PIVOT

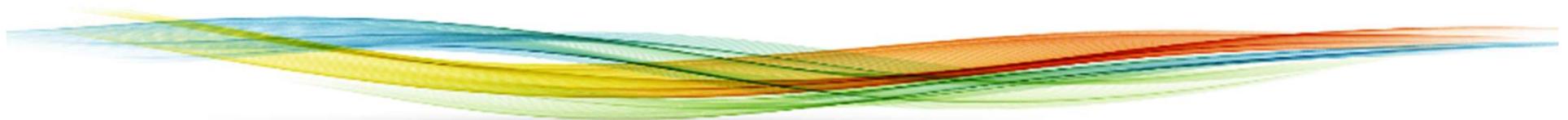
UNPRECEDENTED TIMES

- Our mission is still critical
- Philanthropy is resilient
- Needs following the virus are real
- Philanthropy remains the great enhancer
- Don't make up stories in your head



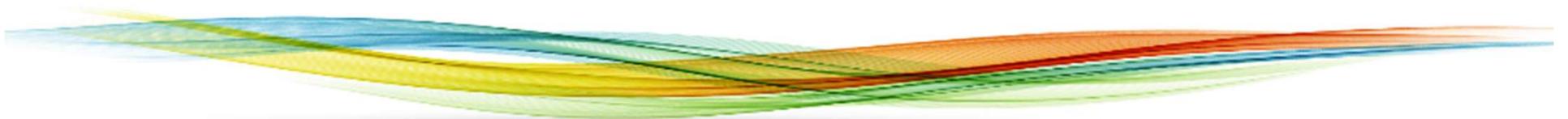
THE OPPORTUNITY TO PIVOT

- This provides us an opportunity to re-look, re-assess and re-boot programs
- Recognize this may not be a couple of weeks
- You have the unique opportunity to focus on your work in new and productive ways
 - How can you strengthen ties with donors?
 - Do you know how they prefer to engage virtually?



CRITICAL QUESTIONS FOR REFLECTION

- What are we doing well?
 - Keep doing it and think about how you can do it even better?
- What are we not doing well?
 - What is our opportunity?
- How do you do the “right things”?



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OPPORTUNITY MINDSET VS. CANCELLATION MINDSET

OUR OPPORTUNITIES

- Phone conversations with donors and prospects do not need to be cancelled
- Hand-written notes are not cancelled
- Emails and passing along articles to donors and prospects are not cancelled
- Relationships will not be cancelled
- Writing and telling stories virtually about your organization's impact does need not be cancelled

OUR OPPORTUNITIES

- Listening is not cancelled
- Caring is not cancelled
- Online learning and professional development need not be cancelled
- Writing donor strategies is not cancelled
- Working with your natural partners to strengthen best practices is not cancelled
- Reviewing and cleaning out your portfolio is not cancelled

OUR OPPORTUNITIES

- Reading a great blog or article is not cancelled
- Adding strategic time blocks to your calendar to ensure you are focusing on your most important work is not cancelled
- Your organization's good work is not cancelled
- The impact your organization has on the community is not cancelled
- Focusing on our future good is not cancelled
- Hope will not be cancelled

BLOG: <http://kddphilanthropy.com/how-the-coronavirus-covid-19-is-impacting-fundraising-shops/>



MOVING DONOR MEETINGS TO
THE PHONE and/or A VIRTUAL
PLATFORM

REACH OUT

- Some of our donors/prospects may be feeling isolated
- Some people are going to have more time for conversations
- We can be sincere in our approach and still move conversations forward
- Creating engagement now does not necessarily mean you will be asking now- you are reaching out
- Connection is important...for both our donors, and for us!



BE PREPARED

- What questions might they ask?
- What will we be doing when things “return to normal”?
- How is our institution a part of the “new normal”?
- What are your pride points?
- How do you make those you are calling the hero in our new stories?

CURRENT RELATIONSHIPS

- Reach out, they are a member of our extended family
- Have a message of care/check in
- Confirm preferred methods of communication
- Call is not about an ask, but be prepared to discuss new opportunities
- Work your strategies



AN EXAMPLE

“Today I set up an online calendar for 30-minute phone and video chat sessions. Then I emailed our donors inviting them to join me for a virtual cup of coffee over the coming weeks” ~
Blog response



NEW RELATIONSHIPS

- An opportunity to talk/connect with our greater community
- Introduce your role
- Call is not about an ask, but be prepared to discuss new opportunities (engagement!)
- Learn more about their connections, and what those might look like moving forward
- Know that it is okay that you may not be able to solicit a gift for a bit of time



CONFIDENT CONVERSATIONALIST IS A THING

- Script
- Ask probing questions
- Role play (your colleagues might be feeling isolated too!...and this is a great way to educate on your role)
- Reflection
- Tools (Ear buds? Headsets? Talking by walking around)

CORE CONCEPT: Our industry needs us to be as good on the phone as we are in person...make it so!

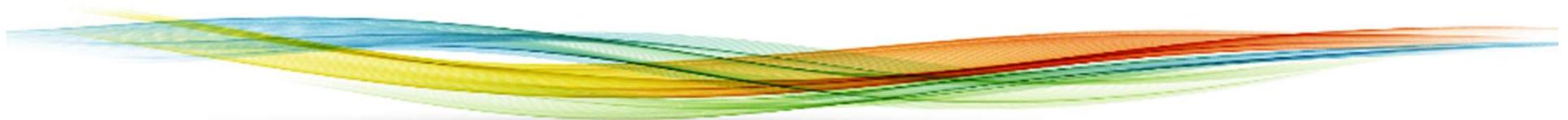
QUESTIONS

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FRAMING CANCELLATIONS AS OPPORTUNITIES

A CANCELLATION CAN BE AN OPPORTUNITY

- Have a communications plan in place (a simple video, photos or an impact statement) on the actual date
- Remind people why your mission/work is important
- Follow up in the same way you would an actual event (make sure these are tied to strategy!)
- Use the cancellation to determine how this event may change in the future





STRENGTHENING YOUR PORTFOLIO

5 MINUTE GOOGLE SEARCH

- Create a mini profile
- Include photos if they are available
- Think of the search as “finding factoids”
- Don’t focus on “the usual stuff”: (home value, political donations etc., look for the diamonds in the rough)

Credit to Lisa Greer

BLIND PORTFOLIO EXERCISE

- *Part One: Utilizing your “blind” portfolio, please identify and rank your top 15 prospects.*

Key considerations:

- How important is past giving? Current giving?
- How do you utilize capacity scores?
- Do you utilize your portfolio trends to assist in your weighting?



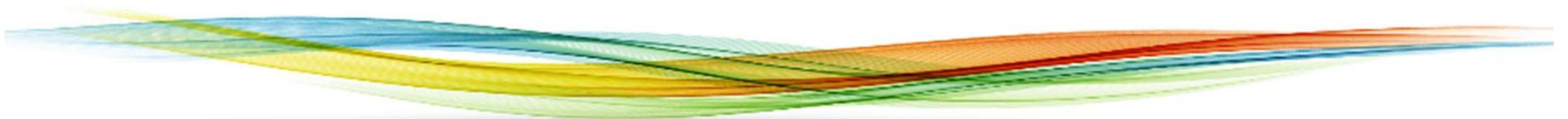
BLIND PORTFOLIO EXERCISE

- *Part Two: Identify 10 prospects that you may want to consider moving from your portfolio.*

Key considerations:

- What “markers” suggest these prospects are a lower ranked prospect?
- Does inactivity play a role in the decision to drop a prospect?
- Could this prospect move to another portfolio? Where and why?

BLIND PORTFOLIO EXERCISE





DOING THE RIGHT THING DURING A TIME OF CRISIS

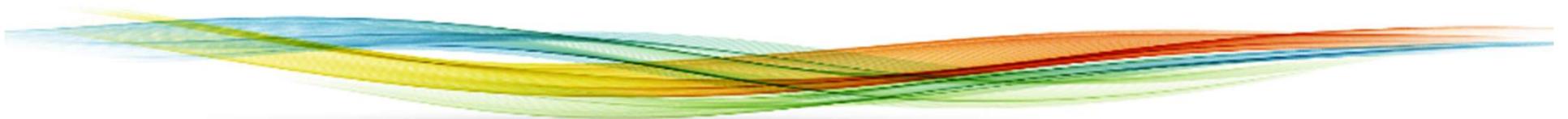
CORE CONCEPTS

- Relationships trump all. This is about building for your institutions future.
- Do not “take advantage” of the situation...make sure you are not “tone deaf”
- What does your gut tell you?
- Metrics should not drive action, relationships and compassion should be our drivers
- Push your discomfort to become comfortable with a new way of doing business

QUESTIONS

TAKEAWAYS

- Build your daily structure and stick to it!
- Cleaning up your portfolio will help you in reaching out to the “right” prospects and donors for this time
- Invest in relationships now: two touches a day
- Share your mission and build engagement for current and/or future gifts



CONNECT WITH US!

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Coaching:

Today's development professionals work with ever-increasing expectations in the face of growing organizational needs. KDD Philanthropy helps these professionals build the skills and strategies that allow them to exceed goals, demonstrate accountability, and leverage these outcomes to greater success.

<http://kddphilanthropy.com/fundraising-coaching/>

