



Advancement During Our Global Crisis

These are confusing, scary, and unparalleled times. Never before has a global health crisis along with a world-wide financial crisis emerged so swiftly and with so many negative societal implications. With schools, restaurants, and businesses of all types shuttering their face-to-face activities and healthcare systems straining under the pressure of patient needs, the COVID-19 pandemic is impacting all aspects of life. As this special e-Bulletin is being written, global economic and public health leaders are encouraging people to be prepared for both [longer-term global recession](#) as well as [more widespread and stringent physical distancing policies](#).

Yes, these are confusing, scary, and unparalleled times.

And, these also are the times when advancement and development teams do some of their most profoundly important and best work.

It is during these times that the important mission of your institution or organization needs more charitable gift resources. It is during these times that those you serve need your voice to communicate their struggles to a wider audience. And, it is during these times that your donors and funding partners need to experience your care and compassion for them.

In this special e-Bulletin, we are providing a collection of strategies, tactics and approaches you can employ during these difficult times. We also want you to be encouraged in your efforts during the coming weeks and months. For so many reasons, the important mission you serve has never been more needed and your work to advance that mission has never been more consequential.

Important Reminders From Previous Crises

The coordinated terrorist attacks on the United States on September 11, 2001, and the Great Recession of 2008-2009 are the two most recent and significant crises of the past 20 years. While each of these events brought forward their own unique challenges for advancement professionals, there is much we can learn from having lived and worked through them.

First, your donors still care about and support your mission. From previous crises, we have learned that philanthropy is resilient and that donors continue to support the nonprofits for which they care most deeply. While social media feeds and cable news channels have everyone's attention focused on COVID-19 and the declines in the global financial markets, it remains that the vast majority of donors who supported you prior to the emergence of the pandemic are still supportive of your mission today.

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Additionally, and importantly, the need for that support is still present (or, perhaps, is now increased). Even with the overwhelming, but understandable, focus on this crisis, your donors still care about your mission and they want to help.

Second, you should show a special measure of care to your donors during this difficult time. You can and should be communicating with your donors as part of the continuation of your important work, but also because you care for them as people. How are they doing? What is the situation where they live and work? How are they coping? As was the case during previous crises, we are reminded today that all of us are experiencing these difficulties together and we all benefit from staying connected to those with whom we care about most.

Finally, if you are experiencing increased budgetary pressure during this crisis, be strategic in how reductions are made. Plainly stated, now is not the time to reduce advancement-related investments. **Throughout our 70-years as an advancement and leadership consulting firm, one lesson we have learned from clients is that reductions in the advancement budget always lead to fewer resources for operations, programs, and people. When resources are needed most, institutions should protect, not reduce, investments in advancement and development.**

A Special Note About This Crisis

The physical distancing aspect of this crisis is new. With people sheltering in place and many team members working remotely it will be especially important for advancement leaders to establish clear schedules and protocols to keep all advancement team members involved, engaged, and productive. Establishing video and phone meeting schedules, having clear written and distributed agendas for virtual meetings, and, in general, practicing productive virtual meeting guidelines will go a long way toward continuing team connectedness and integration.

With our donors and our team members experiencing so many impacts, what can (and should) advancement professionals be doing during this crisis? Below are a collection of strategies, tactics, and tasks designed to strengthen relationships with your key constituents, help you generate needed charitable gift income throughout this crisis, and also position your advancement program for success once these difficult times pass.

Development (i.e., Fundraising) Strategies

- **Focus on your mission.** If your institution's mission involves healthcare or you have staff serving as front line responders to the COVID-19 pandemic, now is the time to invite people to support your work in caring for the sick, the vulnerable, the elderly, or to conduct needed medical research, etc. You are serving the community and our world. Your need is our need and it is urgent. Inviting donors to help is not only the right work to be doing, it is critical to helping end this crisis.

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- **Focus on your mission – Part II.** Even if your institution’s mission is not directly related to the current crisis, inviting donors to support your mission through your annual giving program is appropriate and should continue. Your appeals for annual gifts should communicate the challenging times we all are experiencing and should highlight the basic message of the importance of your mission. Remind donors why your institution matters now more than ever. Explain how you are adapting to the challenges of this pandemic while still fulfilling your mission. And, share with them how their support makes a difference to those you serve.

- **Campaigns and campaign planning should continue.** If you are currently engaged in a campaign or planning a campaign, you should continue your efforts. Here are examples of campaign-related work that you can and should be doing:
 - **Pre-campaign and planning phase.** Use this period to assess gift acceptance and gift receipting practices and policies. Review your case for support to ensure engaging pictures; clear, concise and compelling language; and overall campaign message alignment with your mission and vision. Review and adjust your campaign plan and timeline as needed and continue overall campaign preparedness and database integrity activities.
 - **Quiet Phase.** Donors who commit significant charitable gifts during your campaign’s Quiet Phase are special and important to your cause. They are your “early adopters” and key charitable investors. Staying connected with each of these important donors throughout this crisis is critical. Utilize, as is appropriate, your volunteer campaign leadership team to assist in this ongoing outreach effort. Establish key message points and a personal communication plan for each of your Quiet Phase major gift donors. A component of your campaign’s message at this point should include how you will respond to major donors who may request to delay or defer their pledge commitments. As these requests may arise, our firm’s advice is to be sensitive to the circumstances of your donors and be as flexible as possible with their pledge fulfillments. A deferred pledge is much more valuable than an unfulfilled pledge. Additionally, you may want to establish an invitation-only video call or conference phone call schedule so that institutional leaders can update your Quiet Phase donors and prospects on the status of your institution in general; the progress of the campaign and your campaign initiatives; and your campaign plans moving forward. Do not worry if you do not have specific answers for every question at this point. This crisis is quickly evolving and some of your plans and timelines will be as well. The important point is to engage your significant donors, constituents, and prospects proactively and consistently.
 - **Public Phase.** If you already have announced your campaign publicly, you will want to identify strategies for campaign mass communication during this crisis. These strategies should be designed to update your constituents on your campaign progress, your plans, and potentially changing timelines and/or goals. While physical campaign events will be postponed during the next weeks and months, you should use this time to prepare and begin distribution of video vignettes and stories focused on your institution’s adaptations during this crisis. Additionally, recruiting donors to record brief videos of “why I’m giving during this crisis,” will be helpful.

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- **Most significant gift solicitations should be delayed.** In general, and especially if your institution's mission is not directly COVID-19 or healthcare-related, most major gift solicitations should be postponed. Soliciting donors for significant, perhaps multi-year commitments should be delayed until we all better understand the longer-term health and financial implications of this pandemic.
- **Annual giving efforts should continue.** Whether you are set to send out a direct mail appeal or conduct a giving day, we are encouraging you to continue your important annual giving work. Of course, you should be flexible in your implementation and the message of these appeals should be sensitive to and should reflect the realities of the crisis and its impact on your institution, your donors, and those you serve. As an example, many educational institutions are in the midst of spring phonathon efforts utilizing student callers. With most institutions going to online learning formats, students are no longer on campus to conduct calling. However, depending on your technology and methodology, you may decide to continue your phonathon program. For instance, we are currently working with client institutions that are conducting phonathons remotely with student callers. The callers are asking about the donor's wellbeing, updating them on the institution's decisions related to COVID-19, and also seeking annual fund pledges (while the students are not taking credit card gifts over the phone because of the remote set-up, they are directing the donor to the institution's website to fulfill the pledge).
- **Involve your whole team.** Integrate the work of gift officers with your annual giving team to call or video call your annual leadership-level donors to check-in with them; ask about their wellbeing; thank them for their continuing, leadership-level support; and, if appropriate given the donor's current giving, invite them to continue their support during this difficult period.
- **Increase your social media presence.** If you have not previously invested the energy and time to strengthen your social media solicitation strategy and outreach, this is the time to do so. While physical distancing measures have people tethered more tightly to their computers, inviting your donors and constituents to follow your social media channels and support your organization via social media will be an increasingly important part of your annual giving strategies. Social media challenges, competitions, and "snap and share," or "giving days" are all proven ways to utilize social media for fundraising. A helpful social media approach during these trying times is to balance sharing serious and needed health-related and operational information with information and images focused on the new ways you are working and fulfilling your mission, along with more light-hearted and uplifting vignettes and images of how your community is coping during the crisis.
- **Go virtual for events.** Even before this crisis, a number of our clients were testing virtual event strategies. Now that physical distancing measures are in place, consider planning future fundraising events virtually. Involving board members or other key volunteers as "table captains" to generate gift income is helpful. Additionally, using online auction platforms can considerably expand the reach of your previously in-person auction by recruiting volunteer leaders to share the links to the auction and auction items through their social networks.

Advancement Communications

- **Include your CEO/President/Head of School.** Crises have a way of bringing into sharp relief the importance of leaders and leadership. Donors and other funders want to hear from those leading your institution. Now may be the time to create a leader-written blog, a video blog, or even an “insider’s letter” that is designed to strengthen the trust between those who care about and support your mission and your institution’s leadership. If this is a strategy you decide to employ, keep in mind this should not simply be a “news update” communication. Instead it should be a communication channel in which your institution’s leader shares his or her thoughts, concerns, hopes, aspirations, observations, and other personal views during these difficult times. Authentic transparency enhances trust.
- **Review and refine your case statement.** For many institutions, a case for support is only prepared when in a campaign. But we know that even non-campaign development activities are enhanced when you have a clear, compelling, and concise case statement. As you respond to this crisis, sharpen your messages designed to encourage more support by answering the critical question, “why should donors care enough to make a gift?”
- **Words matter.** As you have in-person events or other activities that are being impacted by this crisis, use the word “postponed,” or “delayed,” as opposed to the more negative and final-sounding “cancelled.”

Donor and Constituent Relations

- **Care for your donors.** With the travel of gift officers curtailed, conduct outreach phone and/or video calls to major gift donors, prospects, and key constituents to ask about their wellbeing. How are they coping? Are they healthy? How are their families? How are they and their businesses being impacted? Show care to those who continue to show care for your mission. It’s the right work to be doing.
- **Be more personal.** While texting, emails, and social media will continue to be important channels of communication, we are encouraging more personal outreaches via voice and video to help strengthen the bonds of community, friendship, and connectedness. For many - especially older, single, sick, and/or isolated constituents and donors who live in highly-impacted areas - physical distancing measures may evolve quickly into feelings of social isolation. Offering a person-to-person connection via a grateful phone or video call will help break down these feelings of aloneness. Even a friendly voicemail to check on donors and offer your thanks for their support can make an impact. Additionally, such personal outreaches of care and gratitude will advance your relationship with every donor and constituent you reach.
- **Do not forget Foundations.** Outreach to your Foundation partners also is important during this time. Find out how the pandemic is impacting their operations, thank them, and let them know what you are doing and how you are coping as you continue to fulfill your important mission.

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Declines in endowment assets will surely impact the future support they are able to distribute, and your outreach and appreciation for what they have done in support of your mission will be remembered and appreciated.

- **Show. . .and tell.** As you are able, take and share pictures of your campus, online learning, or your organization's operations. Your "place" probably looks very different now than it did a month ago. Sharing pictures of how you are responding is an impactful way of communicating that your important work continues and that you are thankful for the continued and needed support from donors.

Advancement Services and Prospect Research

- **Use the time you've never had before.** One outcome of our new, remote-work reality is that we all have "found time" to do tasks we previously had little time to complete. For instance, in more normal times, database health and integrity activities can take a backseat to more pressing activities and events. In the days and weeks ahead, organize your team to correct contact information, gather and research accurate email addresses, review donor "soft-credits," and remove duplicate (even triplicate) database records. The institutions that use this period to enhance the accuracy and health of their database will emerge from this crisis better positioned to engage and invite support from their donors and prospective donors.
- **Conduct prospect research activities.** While the financial markets are in turmoil and many of your donors' wealth profiles are being negatively impacted, there is still much to learn from wealth screen data. Many institutions have an abundance of wealth screen data but have not always had the implementation plans to utilize this data. Use this opportunity to review your most recent wealth screen information and identify strategies for outreach to your most capable donors and prospects.
- **Conduct prospect research activities – Part II.** Prospect research should be focused on more than wealth screens and wealth indicators (which will need to be reviewed given the current market turmoil). Additionally, we encourage you to review your donor records to identify and note donor interests and connections to your institution. During times of crisis, the more you can remind donors why your institution should remain important to them, the better positioned you will be to continue your important work of generating gift income.
- **Conduct prospect research activities – Part III.** Use this non-travel period for gift officers as an opportunity to renew "discovery" outreach with prospects via phone and video. This discovery outreach can be framed as a check-in that your institution is conducting with many donors, friends, alumni, etc., to learn more about how they are spending their time and coping at home during this pandemic. Not only is this a unique time to get to know prospects with whom you have been seeking a deeper relationship, most people now have the time and the tools (i.e., video and/or phone) to connect. Be sure to end the call or video chat with a reminder that you would welcome an in-person visit once this crisis passes.

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We will emerge from these difficult times. While no one can predict with certainty when this crisis will be over, we know that gathering resources so that our institutions can continue to serve as capably as possible during and beyond this crisis is the work we have ahead of us.

In fact, encouraging generosity – even during the most difficult of circumstances – is part of regaining some semblance of societal normalcy. People want to help others, especially when times are difficult. We have the honor of being in positions to encourage that most human and generous impulse. And acting on *that impulse* is needed now, more than ever.

All of us at Gonser Gerber wish you the best as you navigate these challenging times. As always, if we can be helpful to you and your team, please contact us at www.gonsergerber.com or by calling 630.505.1433