



Reimagining your fundraising: Navigating the challenges presented by the coronavirus

Presentation for Charter Schools



Today's Presenters



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Today's Objectives

- I. Share COVID-19 Observations and Recommendations
- II. Discuss Charter School Landscape
- III. Share Messaging, Event, and Gift Request Best Practices
- IV. Plan for June 30 and FY2021
- V. Questions and Discussion

Pressing Fundraising Questions of the COVID-19 Crisis

How do we move forward with gift requests in this environment?

How do we craft appropriate fundraising messages and determine the right timing?

What are solutions if our government funding decreases?

How will we meet end-of-year giving goals without travel, events, and other traditional methods?

How do we manage fundraising projects/campaigns that are currently underway?

How can we possibly start to plan for next year when there is so much uncertainty?

Timeless Principles for Fundraising

Concerns about the impact of Coronavirus (COVID-19) underscore the nonprofit sector's vital leadership role in the welfare of our communities. In light of the current and rapidly evolving circumstances, CCS offers the following timeless fundraising principles to remember and reinforce:



**1. Increase
Communication**



**2. Communicate
Financial Impact**



**3. Consider
Special
Fundraising
Initiatives**



**4. Avoid
Wholesale
Cancellation of
Fundraising Plans**



**5. Develop a
Short-Term
Action Plan**



**6. Reaffirm Your
Mission and
Impact**



**7. Motivate Your
Stakeholders**



**8. Show Empathy
and Concern
for Your
Stakeholders**

Charter School Landscape

Charter School Survey Results



What we learned...

1. There is a strong grant culture within the charter school system.
2. Major gift requests yield the highest ROI for charter schools.
3. School families are some of our best prospects.
4. Board members have the ability to engage at a deeper level.
5. Reevaluating your events can develop a more engaged culture of philanthropy.

Challenges

- I. New normal of education
- II. Unknown changes to government funding
- III. New expenses to respond to COVID-19 needs
- IV. Planning with unknown FY21 landscape
- V. Financial hardship of donors

Opportunities

- I. Elevating your school's brand
- II. Building connections with donors to elevate support
- III. Pivoting event models to major gifts
- IV. Building a culture of philanthropy

Messaging, Events, and Gift Requests

Crafting Appropriate Messaging and Determining Solicitation Timeline for Each Constituency



First Outreach: Empathy

We care about you and your family

- Acknowledge the uncertainty and difficulty of the situation
- Check in: How are you?

We care about our essential workers

- Acknowledge and validate requests from essential workers

We care about our students

- Explain how the school is caring for the community and keeping students healthy and safe



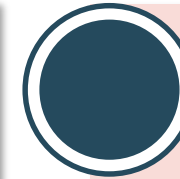
Second Outreach: Leadership and Need

How school is responding to the crisis

- Response by school leaders
- Transition to online learning
- Share stories of success and faculty creativity and adaptability
- Strength of community

These efforts and our community need support

- Increased technology, and healthy and safety expenses
- Greater need for faculty support and training
- Demand for financial aid and tuition assistance



Third Outreach: Impact and Need

We are proud of our community and:

- Our response during COVID-19
- How we've supported one another
- Our faculty's dedication and commitment to keep students engaged in all aspects of school life

Call to action

- Pride in your school that has demonstrated these admirable qualities
- Worthy of your support

Events

Have an upcoming event? Here are tips to consider when re-evaluating whether to move virtual, postpone, or cancel.

Ask yourself these questions

- What is the intended purpose of the event & what else can you be doing with your time?
- How do you plan to measure success?
- Does the tone of your event make sense, right now?

Types of virtual events to consider

- Trivia Nights & Talent Shows
- Town Halls & Expert Led Discussions
- Small Group Virtual Dinners/Happy Hours/Coffees etc.
- Distance Learning and Virtual School Tours

Virtual event examples

- Thurgood Marshall Academy pivoted their gala to a virtual student showcase with a suggested donation and a soft in-event ask
- Two Rivers Public Charter School launched a one-week silent auction and invited donors to a closing toast at its conclusion
- KIPP DC canceled their KIPP Prom and launched an emergency relief campaign for alumni, raising over \$262,000 in just six weeks
- FOCUS pivoted their First Friday school tours virtually providing funders an opportunity to “pop-in” on teachers doing distance learning

Virtual Gift Requests

Scheduling the Visit	Conversation Outline	The Gift Request
<p><i>“Jane, how are you and your family? How are you faring during this unprecedented time?”</i></p> <p><i>“I’m proud to share that our school has pivoted to virtual learning well, and we’re seeing a tremendous value to our students through our distance learning platform.”</i></p> <p><i>“This situation has posed challenges for families and schools, and our school is facing it’s own challenges. Would you be willing to have a video meeting to discuss our school’s needs and how you can support us?”</i></p>	<ol style="list-style-type: none">I. Small talk / connectII. Share gratitude for their past supportIII. Share school updates and storiesIV. Request supportV. Thank and determine next steps	<p><i>“I don’t know what other financial obligations you have, especially in this challenging time, but I know how much you love our school. Your support makes even more of an impact now than ever before, so I’d like to invite you to consider a gift of \$XXXX. Is that something you can consider?”</i></p> <p>Pause, listen, and respond:</p> <p>Yes / Less / Need Time / No</p>

Planning

Meeting End-of-Year Giving Goals in the COVID-19 Crisis



Learn from your students!

- Be adaptable
- Pivot to virtual methods
- Seek and respond to feedback from different donor groups
- Leverage various social media platforms



Prepare for massive June push

- Increase community communication and engagement
- Pivot development function so that most team members are focused on addressing this crisis
- Treat June 30 deadline as a mini-campaign



Shift to major gifts mentality

- Shift asks from capital to operating
- Implement special one-time board appeals for over-and-above gifts
- Consider challenge gifts to offset event revenue losses

Planning for Future Fundraising Activity: The Next 100 Days

Begin thinking beyond the June 30 deadline. What steps can your office take to prepare for the 2020-2021 school year?

Take stock of your school's current financial situation	<ul style="list-style-type: none">• Enrollment• Reserves• Increased demand for wrap-around supports
Consider FY20 fundraising performance	<ul style="list-style-type: none">• Annual fund year-over-year comparisons• LYBUNTS/SYBUNTS• Outstanding leadership gifts
Think strategically about FY21 goals	<ul style="list-style-type: none">• Account for increased need and possible decreased revenue• Communicate regularly with the business, recruitment, community and family engagement, and communications offices and Board to set development office up for success

Planning for Future Fundraising Activity: Getting to December 31st

What steps can your office take to make the most of this year? What do you want to accomplish before 2021?

Case

- Strengthen case documents, proposals, and briefing/solicitation memos
- Invest time in developing engaging online case materials or microsites
- Include language that reflects the difficulty of our time and your school's efforts, impact, and leadership

Leadership

- Engage key stakeholders and volunteers in your planning process
- Identify new leaders: improve your relationships with families, alumni and mid-level donors
- Continue personalized outreach to top donors and volunteer leaders

Prospect/ Data Management

- Revisit prospect research: update donor profiles with current information
- Take a second look at current families and alumni prospects and develop outreach strategies
- Evaluate your data entry policies and ensure data (contact info, giving history) is up to date

Plan

- Develop alternative appeal strategies and virtual fundraising events to unite your community
- Create a communications calendar to keep community connected
- Consider establishing a “rainy day fund” for future unanticipated crises

Goal Setting

I. Evaluate year-over-year fundraising trends

II. Create annotated table of gifts

III. Evaluate staff and volunteer leadership

IV. Identify infrastructure needs and outcomes

V. Re-evaluate what success looks like

Gift Level	# of Donors Needed	# of Prospects Needed	Names
\$100,000	1	3	Prospect A Prospect B Prospect C
\$50,000	2	6	Prospect D Prospect E Prospect F Prospect G Prospect H Prospect I
\$25,000	5	15	...
\$10,000	10	30	...
\$5,000	20	60	...
\$1,000	50	150	...
<\$1,000	Many	Many	...

Questions and Discussion

Thank You for Joining Us

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Appendix: Tailor Your Plan

PROJECT + TASKS	Status	April	May	June
Case: Finalize short-term cases for support that support long-term vision				
Identify goal and case elements for focus through 6/30/20				
Create and design the short-term case for Tier 1 Prospects and a more general message for Tier 2-4 prospects				
Recruit/Convene volunteers to help shape the case and create buy-in				
Create Case Details and Multimedia Presentations for Different Audiences				
Leadership: Recruit, confirm, and activate volunteer leadership				
Convene Advancement Committee and present plans				
Identify Chairs and Members for Task Forces (Case, Alumni/ae Engagement, Virtual Events, etc.) if appropriate				
Convene a virtual stakeholders briefing with Head of School				
Research: Identify and sequence top prospects				
Segment 1st tier according to strategy and begin developing an annotated gift table				
Develop detailed engagement and cultivation strategies for Tier One campaign prospects				
Conduct research and draft briefings on next 10-15 prospects				
Build Annotated Table of Gifts with top 100+ Identified Prospects for 6/30				
Develop and Implement Moves Management Strategy				
Prospects: Communicate and engage with donor base				
Complete initial communication as organized by tiering				
General announcement of special fund and appeals				
Advance engagement, cultivation and solicitation strategies for Tier 1 campaign prospects				
Send 2nd tier, 3rd tier and 4th tier appeals as appropriate				
Special announcements				
Follow up communication to 2nd, 3rd and 4th tier appeals				
Personal telephone and email follow up to top priority stakeholders to communicate progress and impact				
Planning: Finalize long-term plan and budgets				
Segment the donor file and implement communication strategy				
Establish Emergency Fund/short-term case on the website				
Reschedule and pivot Giving Day/use Town Halls/Create buy-in virtually				
Identify Hosts for 10-15 Virtual Events, Affinity Groups, or Class Challenges				
Update web page with impact and progress				
Achieve 6/30 financial goals				

Now

Future