

Fundraising Under Pressure: Strategies for Nonprofit Pivots and Growth Webinar Transcript

[00:00:00] **LuCinda Vacura:** Hello. Thank you so much. For joining us. I'm Lucinda Vacura. I use she her pronouns. I'm the Vice President of Business Development and Marketing with Alford Group. I have short brown hair. I'm wearing dark rimmed glasses and a teal scarf today, and I'm sitting against the plant in a bookcase. Thank you so much for being here.

[00:00:19] **LuCinda Vacura:** Our topic today is rapid response fundraising strategy. Before we dive in, I want to tell you a little bit about Alford Group and walk you through some housekeeping items. So I realize many of you are very familiar with Alford Group, but for anybody who may not be we are a national full service consultancy serving the nonprofit community.

[00:00:41] **LuCinda Vacura:** We offer six flagship services, which are listed here on your screen. We are proud member and supporter of a FP, the Association of Fundraising Professionals. We're a certified business women's business enterprise, and a member of the Giving Institute, where our president and CEO Brenda Asari is [00:01:00] currently serving as the chair.

[00:01:01] **LuCinda Vacura:** Of course, to find out more information about Alford Group and who we are and what we do, you can check out our website, which is in the bottom left hand corner of the screen. It's allford.com. I do wanna take just a moment to acknowledge the land on which we reside. You all are calling in from across the country.

[00:01:21] **LuCinda Vacura:** But I'm going to acknowledge Chicago, Illinois, which is where Alford Group's headquarters is based. Chicago is located on the traditional unseated homelands of the council of the three fires, the Ojibwe, Ottawa, and AMI Nations. Many other tribes such as the Miami HoChunk, Menominee, SAC, and Fox also called to this area home.

[00:01:43] **LuCinda Vacura:** The region has long been a center for indigenous people to gather, trade and maintain kinship ties. A few webinar logistics. So first of all this webinar is being recorded and after the webinar concludes within 24 [00:02:00] hours, you'll receive an email from us that will include not only the recording, also the slide deck that you'll see today, as well as links to the tools that we will go over.

[00:02:11] **LuCinda Vacura:** So you'll have all of that at your disposal very soon after. The webinar. Once the webinar concludes, you'll be prompted to complete a very short survey. We really appreciate your feedback. It's short, it's four questions, and that really helps us plan for future events and we appreciate your thoughts.

[00:02:30] **LuCinda Vacura:** Everyone today is in listen only mode for the duration of the webinar, however the chat is open. So as many of you have already found please introduce yourselves, say hello, where you're from, where you're joining us from. Please use the chats to provide comments or reactions throughout the presentation today.

[00:02:50] **LuCinda Vacura:** However, if you do have a question that you wanna ask to the presenters, if you could please instead use the q and A function. So if you mouse over the bottom of your [00:03:00] navigation bar. There's a separate q and a icon that will open a window and there you can chat and type your question that goes directly to the presenters and will answer as many questions as we can at the end of today's presentation.

[00:03:15] **LuCinda Vacura:** So with that, I would love to hand things over to our presenters today. My colleagues and friends, Alexis Cook and Greg Whitney. Thank you so much for presenting today and I'll let you introduce yourselves and kick things off.

[00:03:31] **Alexis Cooke:** Thank you.

[00:03:32] **Alexis Cooke:** Thank you Lucinda. We're so excited to be here. My name is Alexis Cook, Alford Groups Chief Operating Officer, and I have the privilege of supporting our client partners as well.

[00:03:41] **Alexis Cooke:** I spent 20 years leading and supporting development and marketing teams across the nonprofit sector, but largely in Chicago. I use she her pronouns. I am a white woman with dark blonde hair, which I am currently wearing up. I have dark rimmed glasses on a red shirt and a colorful scarf, and I am sitting in front of a blurred [00:04:00] background.

[00:04:00] **Alexis Cooke:** I'm also joining you today from Santa Monica, California, which is the unseated ancestral home of the Tonga Peoples.

[00:04:09] **Greg Whitney:** My name's Greg Whitney and I'm a vice president with Alford Group. I spent over 30 years in the nonprofit sector and primarily in human services holding positions from senior program director executive

director to development director, and worked directly in fundraising for over 20 years.

[00:04:27] **Greg Whitney:** I use he him pronouns, and I'm a white man with gray hair, a little missing on top, and I have dark brown framed glasses with a white blue striped shirt and black half zip sweater on. I have a blurred background as well, and I'm coming to you from Seattle, Washington, the unseated ancestral home of the coast, Salish peoples.

[00:04:47] **Greg Whitney:** All right. We'd like to take a little time today to start off with, to learn a little bit more about what is your highest priority for why you are here today, which will aid us in how we focus on providing you with the [00:05:00] information today. So if you could take a moment to answer this poll, our rapid response poll.

[00:05:05] **Greg Whitney:** Question number one, which of these issues is the highest priority as you build your rapid response fundraising strategy?

[00:05:22] **Alexis Cooke:** This is my favorite part, I think, Greg. Yeah. I really enjoy and appreciate everyone's participation in the polls.

[00:05:35] **Alexis Cooke:** Oh goodness. Yeah. A little bit of everything. A little bit of everything, but I see replacing federal funding in your budget up towards the top as well as engaging board members, meaning meaningfully in fundraising efforts and just starting that strategy. Yep. Absolutely. Absolutely. Let's dive in and just [00:06:00] acknowledge, let's acknowledge if we're finding ourselves needing rapid response fundraising strategies, it's likely because your organization is experiencing or seeking to prevent an impactful budget deficit caused by a loss of funding, as we just saw in the poll, or the impact of the executive orders.

[00:06:18] **Alexis Cooke:** And this is not simply a, this fiscal year problem, most likely, this is probably a multi-year operational concern and issue. So your strategy today needs to go beyond political. And the go beyond business, as usual, as the nonprofit sector is under strain. We know that with the political and economic pressures, we're also seeing increased competition in the marketplace.

[00:06:44] **Alexis Cooke:** And so there's a lot of funding and programmatic uncertainty. And we wanna just say, we know it's difficult and exhausting, that this is a rollercoaster. There are moments of opportunity, which we wanna talk about today, but it's also the highs and lows are coming [00:07:00] quickly. And though we would all love to have a magic wand and catapult ourselves out of

this moment and or secure that elusive wonderful major gift that's gonna save everything, and mitigate the impact we're experiencing.

[00:07:14] **Alexis Cooke:** We know a bandaid is not gonna, it's not appropriate. It's not gonna, it's not gonna cut it. So Greg and I wanna validate that fundraising alone is not enough. It's not appropriate to expect fundraising to suddenly perform far above and beyond the annual goals to save the day. So as we work to communicate with our external audiences and we're working to bolster fundraising, seek more immediate dollars in the door, let's also take this moment and educate our internal audiences and our volunteer leadership so they understand that many small and large tactics are needed simultaneously to strengthen our philanthropic practices and behaviors and ultimately build that momentum to secure the funding we need right now [00:08:00] and shore us up for greater sustainability in the future.

[00:08:04] **Alexis Cooke:** So let's just take an emotional thermometer and would you share with us how you're feeling four months into this changing environment?

[00:08:24] **Alexis Cooke:** I know this is a, that we know this is a really tough time and we're all experiencing it Greg? You're experiencing at work, at home and your personal lives and your communities.

[00:08:39] Oh,

[00:08:41] **Alexis Cooke:** thank you. Yeah. I see, I, we see you. Very anxious, but persisting and uncertain, but optimistic. We see you. I think that's where I sit. I don't know, Greg, where would you put yourself?

[00:08:55] **Greg Whitney:** Yeah, I'm I would agree. I'm that [00:09:00] uncertain but optimistic person. I've been through a few of these before, these challenging times and it's just one of those things that.

[00:09:10] **Greg Whitney:** That comes across every so often and we just happen to have aligned a lot of them together between the pandemic and where we're at just a few years later again. So I,

[00:09:20] **LuCinda Vacura:** yeah

[00:09:21] **Greg Whitney:** I certainly feel that angst that others are experiencing.

[00:09:27] **Alexis Cooke:** Yeah. And for those we really hope to have, we wanna share with you some thoughts today and then we really will hope to use most of our time for the question and answers.

[00:09:34] **Alexis Cooke:** And for all of us who are feeling any, anything along this range please share your questions with us as we go along so we can address them and let's keep the conversation going after as well. And I just wanna offer that specifically to those who feel the sky is falling. We're here for you today, of course, but after.

[00:09:53] **Greg Whitney:** Alright though. Though things may feel overwhelming, there's a lot we can do [00:10:00] within philanthropy to meet this moment and set ourselves up for longer term success. And the early signs that we are seeing in our practice and also historically speaking, private philanthropy will look to lean in during these challenging times and try to address increasing needs and financial gaps that are being left by the absence of funding and especially the federal funding.

[00:10:24] **Greg Whitney:** Both individuals and institutions are, we're seeing, are beginning to realize the magnitude of these public funding cuts and are trying to understand what are the impacts for our country and our communities and how are they needed to help address this new challenge. How charities, how we gather around messaging the impacts to our services and those we serve and how we provide proactive solutions will impact private philanthropy's response over the next few years.

[00:10:57] **Greg Whitney:** How can we be sure [00:11:00] we're at the table? As Alexis pointed out, there is no magic wand. This takes cumulative actions throughout all levels of an organization. This is not just the fundraiser's job to solve and a willingness to be honestly and transparent. Review our circumstances, make organizational plans for different scenarios you may face and be nimble and make course corrections as needed and to not bank on the one big thing.

[00:11:30] **Greg Whitney:** These are all actions that, if we work and we work consistently through our strategies, we can meet these challenges for needed rapid response fundraising and do it in a way that is organized, honest, and will build momentum beyond this emergency crisis that we're facing. We know this is not just probably a three month, a six month, these are longer term issues that we're facing right now.

[00:11:54] **Greg Whitney:** This is gonna take a while for us to get through, and we need to think through those strategies [00:12:00] longer term, not just for today.

[00:12:05] **Greg Whitney:** All right,

[00:12:10] **Greg Whitney:** so we wanted to take a little bit of time to talk about building momentum and accelerating a growth mindset. And at Alpha Group, we counsel taking four action steps for building momentum and accelerating. A growth mindset, which is needed for rapid response fundraising. And the first is, truly let's assess the current state.

[00:12:30] **Greg Whitney:** Identify organizational scenarios and corresponding development projections and activities from an informed that are informed by history and that have some real analysis to them. Make sure you're taking that time to gather the information that's clear and that is helping you develop the potential scenarios you're facing.

[00:12:55] **Greg Whitney:** Build and pivot fundraising strategies to meet the moment. [00:13:00] Focus on current relationships. Start with those that are closest to your organization. We say build momentum from those in your inner circle and move out, convene critical conversations with those that are closest to you and maximize your fundraising efforts that are already underway.

[00:13:19] **Greg Whitney:** And it looks like we got a little out of, sort here, but activate a culture of philanthropy. Engage your board as part of the solution and leverage your ambassador resources and networks. And then position authentic and clear messaging center your messaging on strength-based positions. Cascade, cascade your audience.

[00:13:41] **Greg Whitney:** Not all messages are the same for every segment of your donor audience and emphasize value-based philanthropy. So what I'd like to do is to turn it over to Alexis and we'll start taking a little deeper dive, a little closer look to better understand what each of these mean.

[00:13:58] **Alexis Cooke:** It's almost [00:14:00] appropriate that the animation was a little off, Greg, because actually there's no one order for these things.

[00:14:04] **Alexis Cooke:** But I will say, I think it's really important that we start with assessing our current state of, and current state and where we are today. And so I wanna dive deep, deeper into that with you. So where are we starting from and what are the known and anticipated factors that are impacting your planning?

[00:14:24] **Alexis Cooke:** So we have a few thoughts for you here and I'll share some additional context and details. We go through them. We do absolutely recommend affirming budget implications and using scenario planning to

intentionally and proactively plan at your highest level in and in order to identify and recalibrate fundraising goals.

[00:14:43] **Alexis Cooke:** Your organization, we hope, is starting with a look at your operational budget. And this should then inform additional projections and. Changes in our targets. Of course, specifically to identify where we need short-term, rapid [00:15:00] response campaigns, initiatives, communication plans, et cetera. We recently, Alford Group, our colleagues recently hosted a webinar on scenario planning and we recommended organizations consider outlining best baseline and worst case scenarios, a three scenario plan to guide relevant action steps and decision making.

[00:15:19] **Alexis Cooke:** These three scenarios can then inform your projections, which should ideally be multi-year and would be informed and affirmed in partnership with the development team who are best positioned to assess the donor universe's, giving behavior, your current data analysis, and then make informed decisions based on what has been effective and ineffective in recent years, including if appropriate, the pandemic.

[00:15:48] **Alexis Cooke:** Greg, I know you're gonna speak to this in more detail when we chat about messaging in a moment, but I just wanna acknowledge that it's important to consider how unstable and uncertain the financial picture is for your organization [00:16:00] through this data informed process. Because that's gonna really help you identify that cascade messaging framework.

[00:16:06] **Alexis Cooke:** We wanna make sure that you are able to for example, if you choose to map out a best baseline and worst case scenario plan, you're creating corresponding act activation plans based on those targets. And then aligning the communications matrix defined not just by those scenarios, but by who needs to hear what.

[00:16:28] **Alexis Cooke:** Within your audience, your staff and board need a different messaging, a different level of messaging and transparency. And then your broader constituents should be hearing from you appropriate to how they are how they engage with you. And so we just wanted to make sure to emphasize that your scenario planning doesn't simply promote projections and informed projections and decision making.

[00:16:53] **Alexis Cooke:** It will also inform your communication strategy. We do believe that by starting with this framework we'll [00:17:00] provide you with the a look at what development and fundraising can achieve, and that by doing so, you'll more quickly identify opportunities within activities already started and under underway to see where you can leverage and pivot.

[00:17:12] **Alexis Cooke:** And we're gonna talk a little bit about that next. You'll also be able to see where you may have gaps in the resources needed to sustain your organization through this moment. And that should and must include development, staff, time, talent, and the tools and resources leveraged for philanthropy.

[00:17:29] **Alexis Cooke:** So if you are, if you're, bear with me just a second. There we go.

[00:17:35] **Alexis Cooke:** So if your team is short staffed due to transitions, there may be an opportunity to activate budgeted funds from the open staff positions to hire councils, interim staffing, or bring temp support. So for example, when you're looking at the operational plan and budget if this is something that the fundraising team is experiencing perhaps because they were preset budgeted dollars, there is, there are allocated funds that could be reallocated to shore up the team you need to build those [00:18:00] relationships and bring in those dollars.

[00:18:01] **Alexis Cooke:** We cannot expect to fundraise and reach revised projections without the team in place to manage them. Of course. If you're part of a smaller fundraising team, or you have a team with members who are pulled in many directions, this is a really good time to activate some quick exercises like facilitating a start, stop, continue discussion.

[00:18:19] **Alexis Cooke:** If you have team members who are duplicating efforts or there's an unbalanced workload across team members, it may be helpful to bring a few additional tools forward such as a RACI model, the responsible, accountable, consulted and informed model to create clear lanes of accountability. Really look closely at fundraising tasks and who is doing what you wanna maximize each role in person's talents.

[00:18:39] **Alexis Cooke:** Now, this is not a time where we have time to spare. So looking at a tool like that would be helpful. Another tool for development shops, but of course all. Organization-wide, depending upon the impacts and how broadly they're felt might be the time management matrix, which maps projects and tasks on an important, not important urgent and not urgent access.

[00:18:59] **Alexis Cooke:** And [00:19:00] this might help you make decisions on where best to activate resources. Now for the ultimate goals that you've lined up in alignment with your scenario plans. What we ultimately wanna do is make sure we're working smarter, not harder. And we also wanna make sure that we are reducing administrative tasks that might be taking away.

[00:19:22] **Alexis Cooke:** They either have little ROI on our fundraising practices, or they may be taking away our ability to make the important calls we need to make now so that we're really activating and maximizing the resources that are available to us now. Doing that initial groundwork is gonna lead to smarter strategies for fundraising.

[00:19:45] **Alexis Cooke:** To meet this moment. So what fundraising strategies should we activate or pivot to meet this moment now? And Greg and I wanted to share some opportunities for your consideration though. We want to acknowledge that building [00:20:00] out your fundraising strategy is going to be unique to you and your organization and the resources that you have.

[00:20:06] **Alexis Cooke:** And so again, please be sure to engage with us via the q and a function so we can dive deeper with you. However let's focus on a couple key areas here. First, focusing on our current donor and funder relationships. We know that relationship building activities require an investment, a significant time, staff time, and expense allocations for long-term, specifically transformational giving behaviors and to bring about.

[00:20:34] **Alexis Cooke:** That level of gift and that level of commitment can take at least 12 to 24 months of consistent intentional work. And so this is why a primary strategy now needs to consider our closest constituents spheres. Our family members is how I always refer to them, but our close donor community who are already committed to us and they are already on their donor journey within our organization.

[00:20:57] **Alexis Cooke:** Our current donors and partners know us [00:21:00] well and their relationships are best positioned for us to have some candid conversations with them and ask them to join us for important discussions about where we are right now, what level of support is needed, and to ask them questions about how they might lean in and expand their support.

[00:21:17] **Alexis Cooke:** We do recommend calling and asking for your top donors and funders inputs. Ask them for guidance and perspectives, what are they seeing with their other grantees and leverage those meetings to deepen relationships. We. Because we know our donors and funders well in this sphere in these constituency spheres, we also know how they make decisions about their philanthropy.

[00:21:42] **Alexis Cooke:** We're informed. We're informed because they're already on that journey with us. So again, thinking about how they make decisions about their philanthropy, are they emotional or rational donors? And that will help us better align our positioning to them. Are they where do they prefer to align their support?

[00:21:59] **Alexis Cooke:** What is their [00:22:00] affinity with us and our programming or our initiatives? So we can lean in more quickly and activate their support more quickly. We know that many are looking at individual giving right now and for good reason. And we know that building an individual giving program is an investment.

[00:22:17] **Alexis Cooke:** And we also recognize some of our partners at Alpha Group are looking to jumpstart their individual giving or reenergize their individual giving at this moment out of necessity, and it can feel really overwhelming. What we just wanted to remind you is even if you don't feel your organization has that individual giving program built and ready to roll, you do have individuals who are leaning in and supporting you.

[00:22:42] **Alexis Cooke:** And I'm gonna list a whole bunch of constituency types that you might activate. Board members giving circles, members, visitors, volunteers, ambassadors, alumni grateful patients, your gala or a luncheon attendees. Start with them, get the word out right now. [00:23:00] Engage them appropriate to how they engage with you now, and tier the asks.

[00:23:06] **Alexis Cooke:** Find automations where you can. So it does not have to, these are not all tailored. One-on-one relationship building activities, but it's gonna be really important that you're building up this bench and this bench of engagement work for these individual giving audiences. And it may not have immediate results, but this is an important moment to take advantage of and set your program up for success later.

[00:23:30] **Alexis Cooke:** We also don't wanna be remiss and not mention our funders, our grantors, our community foundations, and our family foundation partners. We've seen many clients successfully seeking and convening conversations with these funder partners right now. And we recommend you do that. They're a great audience to candidly discuss your ra, your relationship with them if they're a current funder, your grant cycle the timing of your grant cycle the purpose and organizational needs that you have in this moment.

[00:23:56] **Alexis Cooke:** And seek to understand under what circumstances you could apply [00:24:00] for an unrestricted grant. Or could we repurpose our renewing grant? Can we create an accelerated timeline? And don't hesitate to ask your funder partners who else they think you should speak with and reach out to so you can activate conversations in a bigger way.

[00:24:17] **Alexis Cooke:** I also think it's important to acknowledge that our community of current donors, those who just recently made commitments, are a really strong audience for us, as you are thinking and stewarding these donors it

is not inappropriate to share updates and news, potentially positioning this as a, as one of our key partners in this work.

[00:24:38] **Alexis Cooke:** I wanted to share with you some important updates about. X, Y, Z and I wanted to share with you our organizational response to this moment, or our scenarios and action plans and how we're navigating this. So if you're cultivating current donor for their annual support funder for a grant, or you have a special initiative commitment on the table these donors are all so they're, you're [00:25:00] actively cultivating these donors and funders are also well positioned for you to go to them and ask, under what circumstances would they be open to hearing about a bundled request a layered request so that your organization can continue to create and or maintain a stable operating environment at a challenging time.

[00:25:18] **Alexis Cooke:** I like to remind folks we definitely don't wanna say no on behalf of our donors, and that's just a really important to think. Really important consideration and a reminder to us all. So we also want to be sure that we are identifying opportunities and efforts that are already underway that could be leveraged to support the need for immediate fundraising results.

[00:25:39] **Alexis Cooke:** And this is an efficiency gain equation, but it's also just a great opportunity to leverage conversations, planning, and resources you've already been allocating ahead of this moment. Have you been thinking about a monthly giving program but not yet? Set it up if you have the resources lined up to do it's not a bad time. This is not a bad time because you'll have natural communication [00:26:00] vehicles prepared to roll it out and gain traction and gain monthly support. Do you have a mid-major giving level identified in your pipeline with best prospects from that pool assigned and hearing from you?

[00:26:12] **Alexis Cooke:** And we don't depending on the size of your individual giving program, your mid-major level may not be they, there may be thousands of constituents in that group. So we're not suggesting this be a an exercise in calling more folks than your staff can handle. But there are so many wonderful strategies that you could be deploying to reach them differently and engage them differently than you may be now.

[00:26:33] **Alexis Cooke:** So we wanted to encourage that. Are you tracking frontline fundraiser outreach and really monitoring and managing. The calls and meetings. This is where we're gonna see a lot of traction for major gift donors and funder relationships, right? It takes a call. Are we communicating with our planned giving society?

[00:26:50] **Alexis Cooke:** Greg, I think about this one a lot. Okay? There are a lot of planned giving donors who have made their ultimate commitment, and it's through a planned gift. Are they giving annually? Are they hearing from you? Are they [00:27:00] hearing from you right now? This might be a really good time to communicate and reach out to those donors,

[00:27:05] **Greg Whitney:** and there may be donors at this point that are planned giving donors that might seed some of that planned gift to you early for this situation and bring their funds forward a little in advance to create maybe an endowment or a named fund that they were looking at in the future while they're living.

[00:27:22] **Greg Whitney:** They may do it now.

[00:27:24] **Alexis Cooke:** Yeah. Yes. That's great. This is a great point. We've also heard from some of our partners that that a concern perception based concern that they're working on and continuing to fundraise for, anything outside of the fundraising needed to get through this moment would be negatively perceived.

[00:27:42] **Alexis Cooke:** And so I just wanted to acknowledge and Greg, I know you agree we do want to encourage us all to stay focused. This is not, it's not a time to, to create too many strategies because you don't, we don't have time. We just don't have time. This is rapid response. However, we also don't wanna be so close [00:28:00] to the trees, the priorities that we're missing a larger landscape.

[00:28:03] **Alexis Cooke:** And so one of the things we wanna encourage folks to look at, for example, if you're in the middle of a campaign or preparing to launch a campaign, right? This might be a really good time to position. Yourself and the campaign in front of prospects. You could position the camp, can you pivot part of the campaign?

[00:28:19] **Alexis Cooke:** Can you leverage your campaign relationship building activities for this moment? Also, can we broaden our reach and presence with impactful and strategic messaging tied to our priorities, our strategic plan on our scenario planning. This campaigns take a lot of effort and so it, it is likely better to pivot than pause your campaign in this moment because you don't wanna lose that momentum and you have already built in audience who are, they just wanna hear your vision.

[00:28:47] **Alexis Cooke:** They wanna support and lean into your vision. And right now your vision is a both and picture because you wanna be through this

moment and sustain this moment, but you also wanna carry forward your vision for the [00:29:00] future and for your community. Okay, just a couple more thoughts here.

[00:29:04] **Alexis Cooke:** Wanted to note that, we know that if your fundraising needs are pressing and urgent right now, you need immediate support. So your focus is on this short term as we were acknowledging, but there is some there is something to think about when we think about how many times can I say, think in one sentence, Greg?

[00:29:21] **Alexis Cooke:** I, we don't want to lose the opportunity to gain short-term support and long-term support. So what we wanted to focus on was positioning immediate asks for longer term strategies will build confidence amongst your donors. So if you can position shortterm, a short term asks from your donor community or funders and seek.

[00:29:48] **Alexis Cooke:** As a multi-year commitment, because it's a multi-year issue, that might be a strong strategy. Can you position can you position your endowment now? Is, would it be appropriate to do [00:30:00] that? We don't want to suggest endowment as a short-term fundraising strategy because those investments provide earnings.

[00:30:06] **Alexis Cooke:** And you may have a 12 month wait cycle before really activating on that in endowment investment. However, it is a strategy for shoring up long-term sustainability. And if your messaging right now is framed in sustainability it could be a great opportunity to promote planned giving and or endowment giving in addition to your short-term fundraising asks.

[00:30:30] **Alexis Cooke:** And then we're gonna move into our third focus area for a moment and I'll give you a chance to hear from Greg and not meet, but one of the last. Actions we wanted to recommend is to activate relationship mapping. And this comes side by side with how we activate and seek support from our ambassadors.

[00:30:50] **Alexis Cooke:** So when we activate relationship mapping, we can broaden our presence and increase connections. And this can be a super meaningful way to engage our ambassadors, like board members and also [00:31:00] their network. The purpose would be to gather names from board members, for example from their networks.

[00:31:07] **Alexis Cooke:** And this will unlock new opportunities to secure new funding, of course, and of course, new partnerships, but also helps us identify ways and new connections for nurturing current relationships. And it can often

feel like a very collaborative, respectful, and strategic effort. We wanna frame this as an opportunity where if you are not doing this work, this might be a valuable add and a valuable use of staff resources at this time.

[00:31:31] **Alexis Cooke:** Because we need to focus on our concentric circles of influence.

[00:31:41] **Greg Whitney:** Those are great strategies and what we wanted to what kept striking out to me. Alexis, as you were talking that through, is what you're really talking about is strategies that build towards a culture of philanthropy and. We feel this is incredibly important 'cause in a fundraising culture, we become focused [00:32:00] on raising those dollars we need right now.

[00:32:02] **Greg Whitney:** And sometimes that's at the expense of relationships. And this can, again, this can become even more entrenched if we approach rapid response fundraising with this mindset. And we believe to be the most successful in both rapid response fundraising and to securing your organization for the long term, it's important to lean into that culture of philanthropy.

[00:32:23] **Greg Whitney:** And this refers to an organizational environment where giving back to the community is deeply ingrained in the organizational values. And it encourages everyone, staff, not just fundraising staff, but the organization staff and its leadership board members, other key philanthropic partners. It can be community leaders that, that you find as supportive partners to actively participate in your philanthropic activities and at times in your specific fundraising efforts.

[00:32:56] **Greg Whitney:** When you lean into philanthropy, you honor everyone who helps [00:33:00] you achieve success in your mission. And for donors in particular. When they see a genuine culture of philanthropy, they feel that what they're supporting truly matters. In a thriving culture of philanthropy, everyone feels connected to your cause and feels motivated to give their time, talent, testimony and treasure.

[00:33:18] **Greg Whitney:** They've been engaged in the work they've had their opinions heard. They may not always be the ones that win the day, but they feel like you've made. You're making good choices and they're engaged in that process and they're engaged in your success. So again, this means center your work. Even during a crisis on relationships and the broader engagement and mission and vision fulfillment.

[00:33:43] **Greg Whitney:** It is critical that you don't lose sight of that and just look at what you need for tomorrow and forget about the relationships, because your close donors will feel that engage in board and scenario planning. Board members are [00:34:00] uniquely positioned as accountable partners and decision makers. And I know that's different for each of you.

[00:34:04] **Greg Whitney:** Where, how has your board been engaged? Do you have access to your board? If you're a director of development or a chief philanthropy officer, hopefully along with their board governance structure, your boards are activating on expectations to participate in fundraising, both for. Both on how or the process behind fundraising and the philosophical, why we give and fundraise.

[00:34:30] **Greg Whitney:** This is where activating your board and your staff to see philanthropy is giving time, talent testimony alongside a treasure is really important. This is not solely about dollars. This is about engagement and really bringing people into your process for meeting your mission and raising the dollars you need now, as well as building those relationships for the long term.

[00:34:55] **Greg Whitney:** Mobilize your ambassador networks in board [00:35:00] discussions about your organization situation. Are you using that time to problem solve together? Are you bringing them questions that make them think how. How do we solve this? Not just bringing them your answers or your scenarios, but actually engaging them in that scenario.

[00:35:18] **Greg Whitney:** Planning work, bring them into the work. Ask them who they can identify and connect with that could help in this work. Who might be perspective donors, share their why in the community that your impact meets this moment. If you are sharing with them your solutions and not actively engaging them to define in this or, to be part of the solution, you may be missing,

[00:35:46] you really

[00:35:46] **Greg Whitney:** may be missing a critical opportunity to bring them along with you on this journey and really strengthen, even if you're at the very beginning stages.

[00:35:54] **Greg Whitney:** If culture of philanthropy was a new word to you, this is the way you start building it. [00:36:00] Partner with your ambassadors and relationship mapping. Helping them create an elevator pitch meeting. That prep meeting and relationship action plans, practice, what it would feel like to solicit and be on a partner call with one of the staff members.

[00:36:17] **Greg Whitney:** Show them that they're the storyteller, not always the solicitor. I think that's what every board member is most concerned is they don't see themselves as solicitors, but they are part of the solicitation process where they're your visionaries, they're your storytellers, and they're the most effective at those, and they're a big part of how you can really move the needle.

[00:36:38] **Greg Whitney:** And bringing in these rapid response dollars. Is the broader staff team engaged? Are they part of your messaging for this moment? And aware of the financial situation, the budget implications and or the risk your organization is facing? If only the leadership is working on this, again, you're missing an opportunity to gain more ambassadors and [00:37:00] more ideas to help you solve the challenges you're facing.

[00:37:04] **Greg Whitney:** Empower ambassadors to be true partners in fundraising work by providing specific opportunities for them to lean in, introducing their networks, hosting a gala table or small cultivation event. Make connections in key sectors or share their why by speaking at events or co-authoring letters.

[00:37:24] **Greg Whitney:** Materials support, thank you calls, stewardship efforts. Have them participate on advisory committees or represent you around town. Get them to join fundraising staff on solicitations. Again, not as the solicitor. Those that are the, those that can help you move the needle. Make sure those donors who can help you move the needle.

[00:37:46] **Greg Whitney:** Make sure you're engaging your board as part of this process. It will carry you beyond the rapid response fundraising into the future. And build your culture even stronger.[00:38:00]

[00:38:00] **Greg Whitney:** So we wanna talk a little bit about position, authentic and clear messaging. So use a strength-based framework to bring people in, strength-based messaging, focused on outcomes and impacts with real time language and transparency. That's appropriate per audience, obviously, but transparently sharing your challenges and that your organization is facing is important.

[00:38:24] **Greg Whitney:** And when we emphasize strengths. Opportunities and power of an individual group or community. We are successfully deploying that strength-based messaging. We want to invite readers into our vision of a brighter future, not the, not a doom and gloom message. It's about a brighter future.

[00:38:44] **Greg Whitney:** It's overcoming this challenge and looking ahead to our longer term goals. And to do this, reframe the challenges you are facing, again, as opportunities and share high level or, in detail with some specific audiences, solutions that they [00:39:00] can be a part of. Strength-based messaging will build bridges and it'll create alignment and create a shared understanding of what your success looks like.

[00:39:10] **Greg Whitney:** You can also focus on the value-based philanthropy. And value-based philanthropy means aligning, charitable giving with a donor's personal values and desired impact. And this, for those that are close in your inner circle those that that can really help you move this needle going beyond simply donating money to ensure contributions are reflecting their core beliefs and goals will help you secure the largest donations.

[00:39:38] **Greg Whitney:** And this is a great moment to ask your donor and your partner universe to lean in. In support and activate many voices as well to help you meet the moment. So it's not just their gift, but it's their gift of sharing their network and helping be the voice to that [00:40:00] network of what you're doing and helping them think and consider about leaning in with them.

[00:40:05] **Greg Whitney:** Join them in supporting your organization. And we, as we as non-market nonprofit marketers and communicators, and. Perhaps most of all fundraisers have been taught that we must emphasize the need to pull on heartstrings and to motivate donors and funders to give their money and volunteers to give their time and partners to work alongside their cause.

[00:40:28] **Greg Whitney:** And focusing on need-based language or stereotype based language can make the call to action all about us. And it can stigmatize and objectify the communities we serve. And it does not build up a forward energy building, positive trajectory or aspiration in the eyes of our donors. It can be part of it at times, but it shouldn't be the overdr factor of your communications.

[00:40:57] **Greg Whitney:** Cascade your messaging per audience [00:41:00] appropriately and consistently. Build trust through an authentic and transparent approach that's appropriate to the different levels of audiences and how close those audiences are to your organization and communicate confidently and authentically.

[00:41:14] **Greg Whitney:** Generally speaking. We encourage organizational leadership to prepare and map financial scenarios and then be authentic and transparent in your messaging. You may tear this to the audience again. Another way to word this question is how can we build and or maintain trust and confidence amongst our stakeholders and constituents at this time?

[00:41:36] **Greg Whitney:** 'cause trust is critical to holding confidence. We want our boards and our donors to trust us to prepare and weather the uncertainty. And we wanna show them we have confidence in the due diligence and the strategies being implemented. We wanna show them that we're. We're nimble that we can adjust. And we know that trust is dependent on our community's understanding of [00:42:00] us to be strong fiscal stewards, honest partners and communicators that are informed as experts in our work.

[00:42:10] **Greg Whitney:** They're looking to you, to us to really share honestly the work that we're doing the challenges we're facing, and have the plan that can, that they can see and appreciate and buy into to move forward through this difficult period. So be authentic and wherever possible, be face-to-face or at the next best, be on Zoom.

[00:42:37] **Greg Whitney:** For those that are at your inner most circle, this is critical. You really need to be personal, authentic, face-to-face whenever possible with your constituents during this time.

[00:42:52] **Alexis Cooke:** Okay we reviewed four significant focus areas to drive action towards rapid response fundraising. And we elevated a few tactics [00:43:00] and tools.

[00:43:00] **Alexis Cooke:** And while Lucinda comes back and joins us for our q and a, I'm just gonna quickly fly through a few things. We just wanna validate that when we are all with working within rapid response strategy, these focus areas that we identified today were designed for immediate action. So you'll likely find them most useful and appli applicable to your situation if you are experiencing one or more of the scenarios that you see here.

[00:43:29] **Alexis Cooke:** And this will, of course what we hope is as you think about the situation you are in, it will fuel questions for us to respond to in a moment. And as you think about what implementation will work best for you, that you'll surface those for us to engage with you on. Through the focus areas, we highlighted a lot of tools and resources and tactics.

[00:43:50] **Alexis Cooke:** So we wanted to make sure to simplify it down into a list, and this will be part of the resources we provide you. As a follow up to the discussion today, and I [00:44:00] just wanna say Greg and I, along with our colleagues at Alpha Group, would love to share more or dive deeper in any one of these at any time.

[00:44:06] **Alexis Cooke:** Please reach out and let us know if you have questions or would just like to learn more about any of these. We, Greg, would you like to share a little bit about the tools?

[00:44:16] **Greg Whitney:** Yeah. Really what we wanted to just really say is that, to further support you on your journey. We'll share a list of links that connect to these tools with you following the webinar.

[00:44:27] **Greg Whitney:** And as Alexis said, don't hesitate book a free consultation with either of us. We'll be sending out a link from both of us as well, that you can book a 30 minute time with to help talk through some of your specific situations and where you're at right now. So what did we miss? What did we not address that can help be helpful in your situation?

[00:44:51] **Greg Whitney:** And what more would you like us to talk about? We wanna hear your questions and thoughts and use the remainder of this time to address what we're seeing in our chat.[00:45:00]

[00:45:02] **LuCinda Vacura:** Great. Thank you both so much. That was really helpful and there's a lot to dig into. And we do have some questions, so I wanna just dive right in and answer as many as we can. First question came in when we were talking about the culture of philanthropy, and this question's very on point.

[00:45:19] **LuCinda Vacura:** And the question is, admittedly, we've let things get a little transactional. How do we build a culture of philanthropy with current longtime donors? And at the same time, part two, how do we approach the new donors that we've just picked up within the last year? So you have your long-term donors, you have your donors that are just coming to you, you're in this rapid moment.

[00:45:44] **LuCinda Vacura:** How do you really also turn that into building a culture of philanthropy?

[00:45:52] **Greg Whitney:** Again I go back to being transparent and honest. Donors know when you haven't been being paid [00:46:00] attention to when they haven't heard from you in a while. And if that's the case here being transparent that I. There's been some challenges or things have been crazy in the organization and that you're working on reestablishing and building that connection a little deeper again, that you'd like to reach out and have some conversations about, where the organization's at, how you're moving forward through this time of change and would hope that they're open to that conversation is just a nice way to approach it.

[00:46:32] **Greg Whitney:** It's a way to acknowledge that you may have been missing. I'd also wanna say that, I'd wanna tell them as a close end donor I wanna share these, this scenario and also be listening for ideas that you might have as a long-term supporter. And again, gathering that information and asking them to lean in, not just with money, but with potential ideas is really important.

[00:46:57] **Alexis Cooke:** Yeah. I love that. [00:47:00] Yeah. An important strategy, if you have the time and resources, is to ensure that you're looking at philanthropy, not fundraising, especially if you're seeking to, to shift the mindset from transactional. It's not just about our dollars that we're giving, right? It's how we're engaged and how we feel part of the solution, how we participate.

[00:47:18] **Alexis Cooke:** So it's a, talent and time and our testimony the four T's as we frequently refer to them. I think it's a great point, Greg.

[00:47:27] **Greg Whitney:** Yeah. And I do understand people have different sized staffs and they may be short staffed right now as well, so they don't even have their full complement of staff.

[00:47:35] **Greg Whitney:** And this is where, and I know this is difficult, but this is where your board ambassadors can be really helpful. They can be some extra arms and voices for you. And if trained, they can help reach out to some of those with some guided questions with a little scripting upfront of why they're reaching out and some understanding on how they bring back notes to you as [00:48:00] an organization.

[00:48:00] **Greg Whitney:** They can help carry this work forward. And again, they're not soliciting, this is not the first solicit. They're trying to reestablish that relationship for you and see where it stands and bring back input and what they learned from that call. So again, they can be incredibly helpful and be engaged as well in building the culture of philanthropy.

[00:48:21] **Greg Whitney:** The newer donors, those that you're just making contact with that. Again, this is where you've got a different audience now and depending on your structure and how much time you have, who in those have capacity? Are you doing capacity screenings right now to learn who might be first who's most efficient to reach out to?

[00:48:42] **Greg Whitney:** Again, for a second gift. This is also, if you don't have a monthly giving club this might be an opportunity that if you can secure that second gift that you look in this next six month period, if you can get the second gift to then also have a conversation around a [00:49:00] monthly giving

club. Because sometimes donors that have made, they've just entered in, they're excited, they've made a second gift.

[00:49:08] **Greg Whitney:** Might they consider that monthly club, and then they're connected in a way that in most scenarios, their dollars will far outweigh they'll outpace their giving and grow their giving over time in a more consistent way.

[00:49:22] **LuCinda Vacura:** That's great. Thank you. Thank you both. The next question from Brenda is about measuring the effectiveness.

[00:49:30] **LuCinda Vacura:** And the question is, what types of metrics or KPIs go along with assessing the effectiveness of different elements of the rapid response work? So any thoughts around, as you go, how do you benchmark progress and know that you're spending your time in the right places?

[00:49:49] **Alexis Cooke:** That's a really interesting question because the reality of the reality is where is our.

[00:49:54] **Alexis Cooke:** Where's the finish line for the rapid response strategy? I'm, [00:50:00] I love operations and KPIs and I want very much to say we need to know and we need to understand what success looks like. And I think it's safe to say that in rapid response. It's probably just a number from the organizational planning perspective.

[00:50:15] **Alexis Cooke:** We have this shortfall, we need this much, right? It may be that simple an equation for many right now, and this is where we, I just wanna go back to the scenario planning, really intentional, thoughtful pieces. And just to address, I saw a comment in the chat as well. I think scenario planning and really intentional conversations with our boards can help mitigate shiny object syndrome or the bake sale phenomenon that was mentioned.

[00:50:39] **Alexis Cooke:** So just to address that and call that out when we very thoughtfully determine. Whether it's a multi scenario plan or this is the scenario and the plan this, that's the moment to define these KPIs and to define what success is going to look like. And part of that's because you need those to understand where in the [00:51:00] process of measuring success, you need to pivot again.

[00:51:03] **Alexis Cooke:** Where are we falling short? I would again call forward Greg. I think you'll agree. This is a time to make sure that our fundraisers, our frontline fundraisers, are focused on the right things. And we

are tracking those KPIs too. This is really about quality context. Yes. And calls and meetings. But it's also about the intentional use of our resources.

[00:51:23] **Alexis Cooke:** Are there opportunities to bring groups together to save us from multi one-on-ones? I would look at those strategies and then define those KPIs so that you're focused and gaining traction. I think this is definitely, Lucinda, you always say you can't have 10 priorities, and this is that moment.

[00:51:40] **Alexis Cooke:** It's that moment. So what are the one to three priorities that you can accomplish within your ultimate fundraising target? And what does success look like? How are you going to define and keep track of, make, determine traction? Greg, I'd love to hear if you have a few additional thoughts.

[00:51:55] **Greg Whitney:** No, I think you're right on the right track.

[00:51:57] **Greg Whitney:** And again, so focused on. [00:52:00] Rapid response fundraising shifts your mindset onto, are we raising money? And as Alexis said, you might hold an event, you might hold a webinar, or not a webinar, but a zoom call with your executive director who's talking to the goal is to talk to your top 50. You've seen an and I think the challenge of that is how many attended that meeting?

[00:52:24] **Greg Whitney:** If you do two of 'em and you've had three people show up, was that worth all the effort to go, let's change and pivot our strategy. We're better off on individual calls. Let's see if we can get our board members to help us schedule individual calls with these folks. We may get much more traction outta that.

[00:52:40] **Greg Whitney:** In rapid response, you have to look at those strategies, look at those metrics and say, are we really gaining traction from these tactics? And if we're not, how do we pivot them? And who do we call into a lie with us to, to help us expand that effort? And now seems like a really good time to be doing that.

[00:52:59] **LuCinda Vacura:** [00:53:00] So in terms of scenario planning, a lot of what we've seen is a lot of organizations did scenario planning back in January and now here we are mid-April. And it is time to revisit that plan and rethink some of these strategies using those metrics. What is working, what's not working, what's phase two of this time that we find ourselves in?

[00:53:19] **Alexis Cooke:** We gotta shorten the runways to those decisions. So just to add, there's another layer. When I think rapid, I'm thinking three, four months, right? I'm thinking really quick turnarounds here. So it may also help to align those KPIs with decision makers. So if there's a, the catalyst to make the decision quickly is.

[00:53:37] **Alexis Cooke:** Is, is efficient.

[00:53:38] **Greg Whitney:** Yeah. Do we have time

[00:53:39] **Alexis Cooke:** for one more? Oh, sorry.

[00:53:40] **Greg Whitney:** I just wanted to say rapid response. Fundraising is not in a vacuum on itself. It is around the scenario planning and there are expense things. There's a shifting federal, you're learning more. So that scenario's changing and might change your messaging and your rapid response.

[00:53:55] **Greg Whitney:** That's a good fundraising as well. Good.

[00:53:57] **LuCinda Vacura:** Definitely. Great point. One [00:54:00] last question and then we do have to wrap up. And this is similar along the lines of what we're saying, but a little bit more specific around campaigns. So the question is, we're about to launch a big anniversary campaign and we're sensitive to over asking for major gifts or gifts of any size.

[00:54:17] **LuCinda Vacura:** So how do we address the immediate needs of the rapid response with our bigger plans for the campaign in the next 12 to 18 months?

[00:54:29] **Alexis Cooke:** We don't have time to answer this in full, I don't think, because this would be a wonderful discussion to have. So I hope we can reach out to you and continue this discussion.

[00:54:37] **Alexis Cooke:** However, I would lean on the strength-based messaging framework, Greg positioned. This is a time where you're inviting your community in to celebrate. But also commit and invest in the future beyond this anniversary. So this is a great opportunity to build trust and confidence, to expand on prebuilt trust and [00:55:00] confidence.

[00:55:00] **Alexis Cooke:** Demonstrate your financial stability and sustainability. Demonstrate your de demonstrate, but also broaden your community's understanding of your reach and impact. It's just a really wonderful opportunity that you don't wanna miss and don't, there's a way to hit

the tone so that if there are members in the community who may have sense, who may be sensitive to the way this could be positioned, you could engage some feedback, some focus groups for that so that you're hitting that that tone right in the right.

[00:55:30] **Alexis Cooke:** You're hitting the right tone for your community and your constituents, but I would not miss the opportunity to position yourself as a with all the wonderful gravitas that should come with hitting a milestone anniversary and launching a campaign. And please don't forget to articulate what is different because of this what will be different.

[00:55:49] **Alexis Cooke:** And not just for you, but in your organization, but for you, the impact that you have, for the vision you have for the future, that you are inviting them into support.

[00:55:58] **Greg Whitney:** And just real quickly at a [00:56:00] launch like that if you have the capacity with your staff, is to have pre-conversations before you get to that and let them know, again, those transparent conversations.

[00:56:10] **Greg Whitney:** And it's good to talk to them about this campaign, but also where you're finding yourself right now. And so that when this comes up, it's an opportunity for a dual ask.

[00:56:24] **LuCinda Vacura:** Great advice. And comes back to the communications piece that we talked so much about. We do have to wrap up. Thank you so much Alexis and Greg for being here and presenting the information and being able to answer these questions. Thank you to all of you for joining and contributing to this conversation.

[00:56:42] **LuCinda Vacura:** There's a lot to unpack. There's a lot to go through. So if we didn't have a chance to answer your question, please do reach out. So the best way to get ahold of us is info@Alford.com. It's our email inbox and we will. Respond there. And thank you Alexis and Greg for being [00:57:00] willing to take a couple calls or Zoom calls to meet with people and think through specific strategies.

[00:57:08] **LuCinda Vacura:** Two final reminders. You will receive an email from us within the next 24 hours that will include not only the recording, but also the slides that you saw today, and also links to the tools that we touched on. We didn't have time to go in depth, but a lot of them are very detailed tools and we will send all of those to you so you have access to those in that email.

[00:57:32] **LuCinda Vacura:** And then finally when we wrap up here, you'll be prompted to complete a very short survey and we appreciate your feedback. So let us know how we did and how we can improve our next webinar. Thank you so much for joining. Thank you again, Alexis and Greg, and we're now we'll disconnect. Have a really great afternoon, everybody.

[00:57:49] **LuCinda Vacura:** Take care. Thank you. Thank

[00:57:50] **Alexis Cooke:** you.