



Cash Now: Fundraising Strategies During Crisis

HOSTED BY: **Margie Taylor, CFRE**

info@getstrategy.com | www.getstrategy.com

Our Series Presenters

Experienced Leaders



**Debra Thompson, MBA
President & CEO**

25+ years' experience in strategic organizational development including research, planning, program development and evaluation.



**John Papalia, Fellow, American
College of Healthcare Executives**

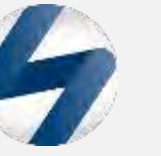
25+ years' experience in healthcare and manufacturing operations as CEO, COO and HR Director.



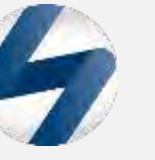
**Margie Taylor, Certified Fund
Raising Executive**

Extensive experience in fundraising, economic development, public relations and communications





“Our economy is in bad shape and will only get worse. So what can we [fundraisers](#) do to minimize the impact of this difficult period on our organizations, and at the same time maximize our income?”



Lessons learned from past crises...

“In a crisis, the tendency is to do everything but raise money”.



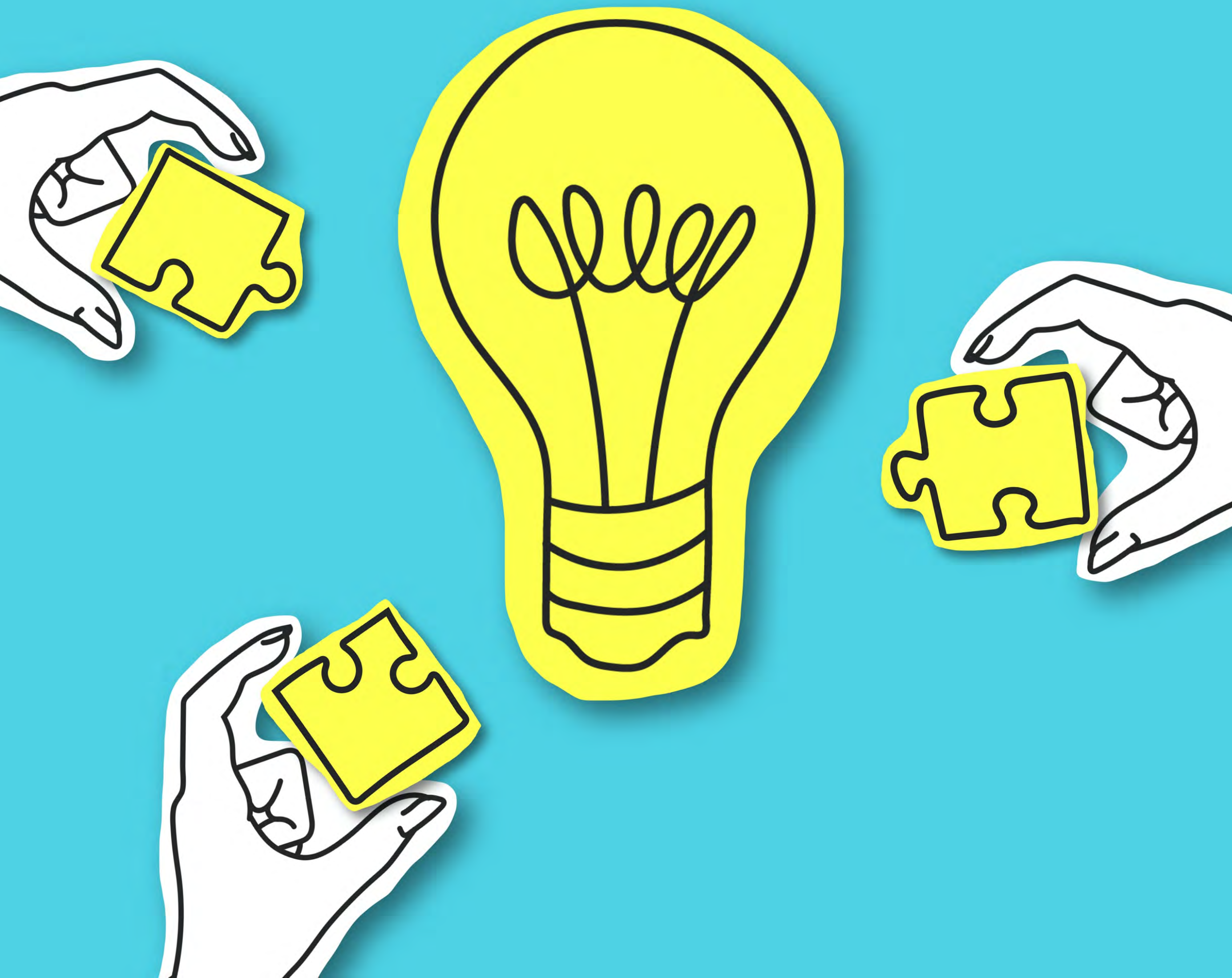
PICK UP THE PHONE. Focus. How the donor is coping. Listen attentively for ways you can help.

Share your situation – serving clients, adopting new technologies – what you are doing, not what you can't do. Share a **SUCCESS STORY**. How your group is helping.

Emphasize resilience, commitment. Share your next steps. Thank them on behalf of your clients.

STEP ONE

**Call Your Board Members, Donors,
Influencers Strengthening
Your Case for Support**

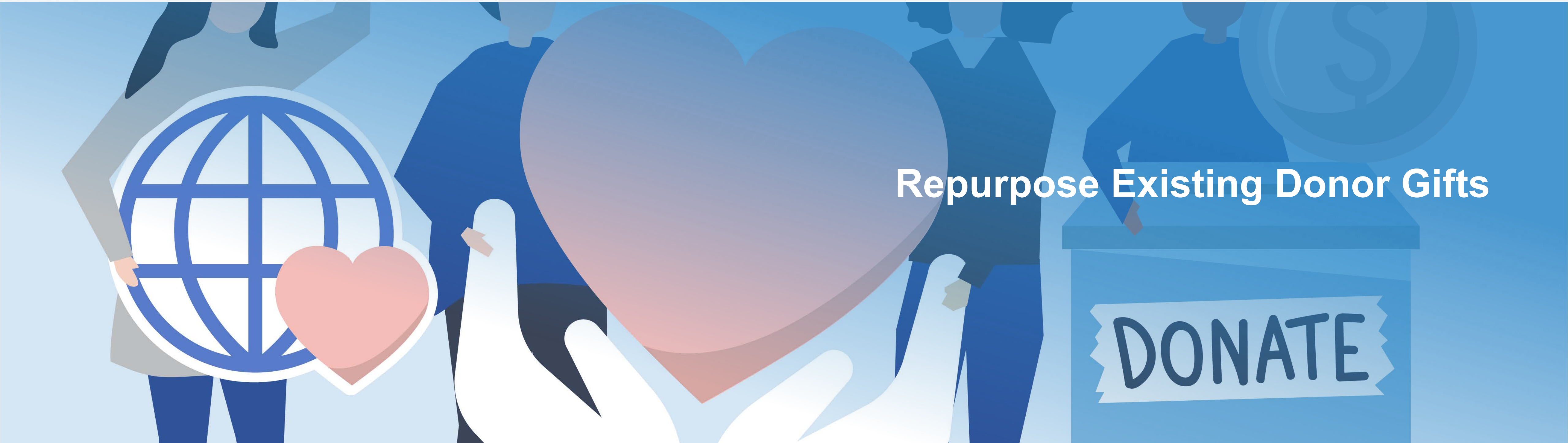
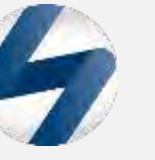


Solicitations in Progress

- Ask donor how s/he wants to proceed. Conclude? Postpone? Schedule follow up call.
- Yes, acknowledge generosity and determine how gift will be made.
- Can't commit? Ask about other ways to help your nonprofit.
- No? Thank for support and ask about other ways s/he can be helpful.

STEP TWO

Stick With What Works



Repurpose Existing Donor Gifts

STEP TWO

Stick With What Works

- *Call to propose removing or lessening restrictions.*
- *Ask to use the funds for immediate needs.*
- *Document via email.*



Stick With What Works

STEP TWO

- Look for Rapid Response Funds
- Grants not now relevant, ask to use for current needs. Document agreement via email.
- Advocate for foundations to release more than the minimum 5% distribution, to create “liquidity.”

Public/Private/Community Foundations



Estate Gifts

- Can your donor early activate estate commitment?

Donor Advised Funds

- CALL your donors and encourage them to continue to recommend your organization.

STEP TWO

Stick With What Works



Pledge Payments



STEP TWO

Stick With What Works

- *Discuss use and likelihood of timeline*
- *Accelerating payments*
- *Deferring payments*
- *Partial payments*



Charitable IRA Rollover

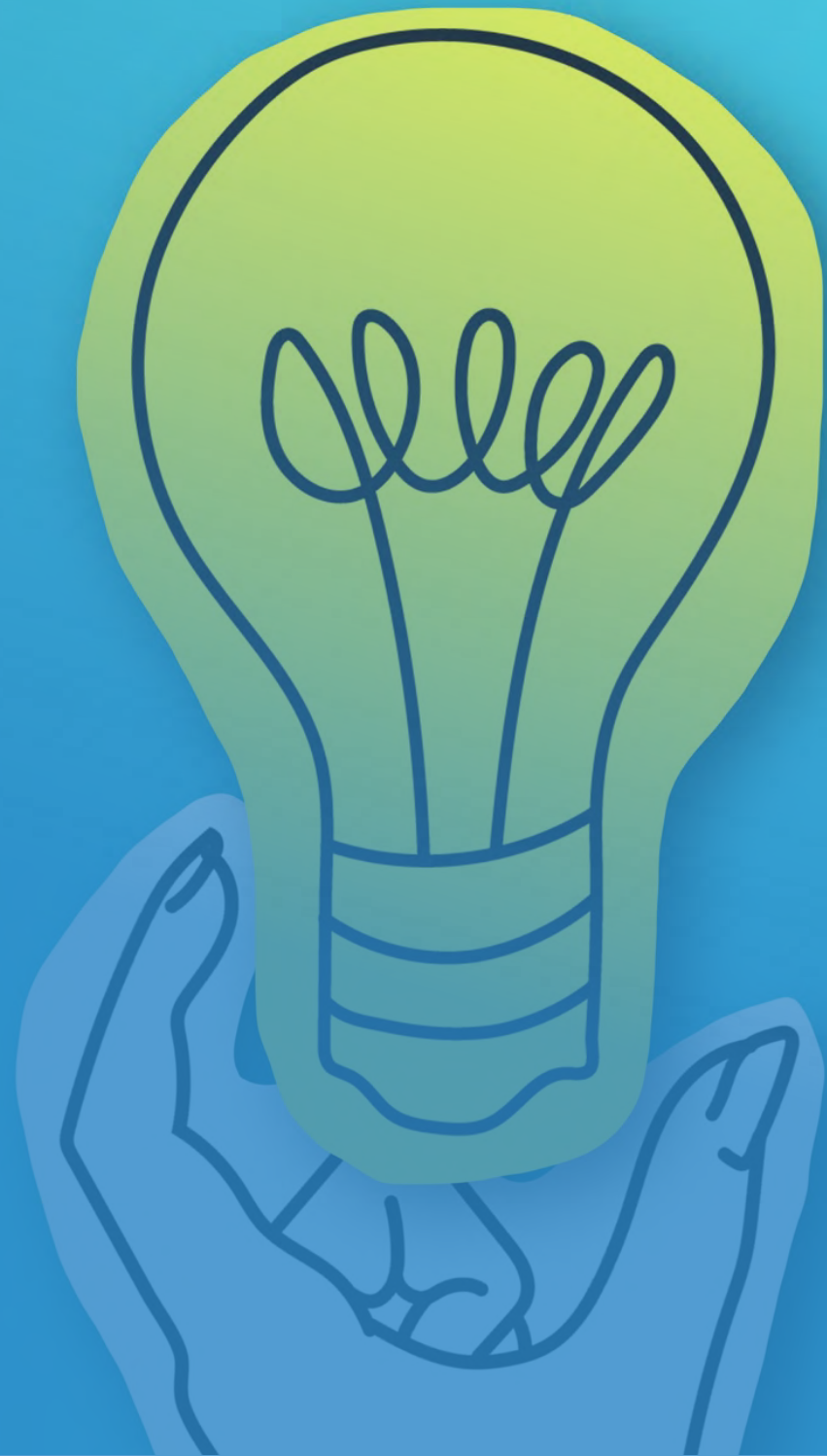
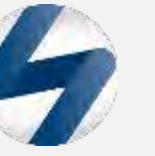
- Check in

Financing

- Existing loans? Negotiate lower interest rates, moratorium on payments, longer terms
- Review assets as collateral with legal/board review/approvals
- Will donor consider loan? Seek legal counsel

STEP TWO

Stick With What Works



STEP TWO

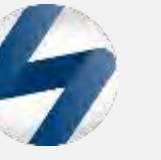
Stick With What Works

Assets

- Persian Rugs

Virtual events/ Annual Appeals

- Encourage online donations
- Put volunteers to work



“Reports on high net-worth American donors reveals that the No. 1 reason donors stopped giving to a particular charity was ‘no longer feeling connected to the organization’.”



- Donors who support your nonprofit will support you if you ask
- All nonprofits internationally/buy local
- Rapid Relief Fund criteria
- Connect the dots
- Go where the funding is
- Consider mergers and acquisitions

STEP Three

Situation Like No Other



Thank you for your participation today.

If you feel that you would like some assistance, please don't
hesitate to reach out to us:

MTaylor@getstrategy.com
info@getstrategy.com

WWW.GETSTRATEGY.COM
814.480.8000

**Cash Now: Fundraising
Strategies During Crisis**