

You Know Your Org Best

A Guide for Managing the COVID-19 Crisis



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A Difficult Time

We all are living through an extraordinary time. Organizations that were previously strained are now being pushed to the absolute limit. Despite these challenges, the many people working day in and day out for nonprofit organizations are determined to continue serving their communities. We wrote this guide for you -- the truly determined worker.

Feeling Overwhelmed

Right now, many of you are being bombarded with emails, webinars, ebooks etc. offering to help you through this crisis. Many experts have developed these resources, giving you tips on the best way to navigate your organization through the pandemic. But what we've learned after meeting and speaking with countless staff of nonprofits, is that **YOU** are the expert of your own organization.

There is no "one size fits all approach" for every organization. You know what is best.

You understand the pulse of your community, what the demand is, and where you need help. You know your donors and whether this is the best time or not to approach them. And that is why we created this ebook "You Know Your Org Best."

The goal of this ebook is to provide you with best practices to meet you in your current situation, wherever that is, so you can implement solutions immediately.

How To Use This Guide

The first part of the ebook includes an assessment tool. After completing this assessment, your resulting score will direct you to a guide for your staff and board, advising where you should focus your energy and resources.

Referencing your score, scroll directly to the section of the guide that is relevant to you.

If you find yourself with a similar score between two sections, consider the information offered in both sections.

We have outlined recommendations that you can implement right away. We hope that you find this guide helpful and easy to use.



Quick Assessment Tool

Urgent Need

- Is your org a first responder organization (food bank, homeless shelter, health)? **5 pts**
- Has your group had to cancel any crucial fundraising events or major income generating events? **5 pts**
- Have you had any (or significant) donors that need to default due to COVID-19? **5 pts**
- Have you had to layoff key staff during this time? **5 pts**

Urgent Need Point Total: _____ (out of 20 pts)

Critical Future Plans

- Do you have a campaign either planned or in-progress? **5 pts**
- Does your board have a strategic plan or a long-term fundraising goal? **5 pts**
- Do you have a plan for attracting new donors? **5 pts**
- Have your donors already made a recent long term commitment? **5 pts**

Critical Future Plans Point Total: _____ (out of 20 pts)

Your Current Needs Are Met

- Have you reached out to your donors since this pandemic? **5 pts**
- Have your donors been impacted financially by the crisis? **5 pts**
- Have your donors/community members reached out to your organization with questions on how you are doing? **5 pts**
- Do you have a captive virtual audience (social media following, e-newsletter subscribers, etc.)? **5 pts**

Your Current Needs Met Point Total: _____ (out of 20 pts)

Recent Increase In Donations

- Have you received an influx of gifts from new donors? **5 pts**
- Do you have donors that have made repeated small gifts? **5 pts**
- Do you have good information in your donor database? **5 pts**
- Do you know what a major gift would be for your organization? **5 pts**

Recent Increase In Donations Point Total: _____ (out of 20 pts)

What Should I Do Now?

If **urgent need** is your highest score, we recommend a focus on **soliciting donations**. At this time, it is important to communicate your needs to your donors and the community at large. Please refer to our section on **Solicitation** found on [page 6](#) of this ebook.

If **critical future plans** is your highest score, we recommend a focus on **prospecting donations**. Your future needs are still important despite the crisis, and now is a good time to start developing your donor pipeline. Please refer to our section on **Prospecting** found on [page 9](#) of this ebook.

If **current needs met** is your highest score, we recommend a focus on **donor stewardship**. This is a good time to reach out to donors to communicate how you are doing, and find out how they are coping with the crisis. Please refer to our section on **Stewardship** found on [page 11](#) of this ebook.

If **recent increase in donations** is your highest score, we recommend a focus on **donor cultivation**. A good response from your recent appeals is positive news, and now it is a great time to find out more information about the new donors to your organization. Please refer to our section on **Cultivation** found on [page 13](#) of this ebook.



Solicitation

Your organization may be on the front lines of this crisis, or perhaps you had an urgent need for funds before this crisis hit. Either way, this is the time to solicit new and current donors for gifts. The news is filled with stories of Canadians who have lost their jobs and are struggling financially. Despite this narrative, there are still donors who are looking to give generously to support those who are suffering.

Here Are Some Recommendations For How to Proceed:

1. If you have not already done so, **establish your organization's current fundraising goal**. If you are uncertain about how to determine that goal, figure out how much money you need to raise to fund your organization through this crisis for the next few months.
2. **Use your data to develop a compelling case statement** outlining the urgency for funding. Having a case statement will give your staff and volunteers consistent language to speak about your need for funding. Your case statement should answer the following questions:
 - Why is what you do important enough that someone should give your cause their hard earned money?
 - What specifically will the money be spent on and what impact will it have on the community you serve?
 - Can you prove that you are trustworthy enough to do what you say you're going to do with the money?

The purpose is to persuade the donor to help your cause and show the impact of your work.

Let us look at an example. Here is a snapshot of monthly statistics from a hypothetical food pantry that provides those in need with two meals for every \$1 donated.

Food Pantry Stats	Feb 2020	Mar 2020	% Change
Number of Monthly Visits	25,000	37,500	50.00%
Number of Meals & Snacks	96,000	150,000	56.25%
Calls to Emergency Food Line	1,200	2,000	66.67%

In this case, the organization chooses to focus their fundraising efforts on the increase in the number of meals and snacks they are providing each month. As stated above, they can provide two meals for every \$1 donated. At the current level of demand, that would mean they need \$75,000/month. They decide that their goal is to raise enough money to cover this initiative for the next four months.

With the data they can quickly create a narrative that answers the crucial questions, and create a quick infographic as shown below:

“As the only food pantry in the community, we’ve been serving the most vulnerable residents for over 10 years. The COVID-19 pandemic has drastically increased the need for food. We urgently need \$300,000 to feed individuals and families in the community. A gift of \$20 can provide 40 meals. Please donate today. “

Your Community Food Pantry



3. And most importantly, **communicate your message to as many people as possible**. Urgency is a powerful motivator for many to give, and many will donate once they hear your message. Contact the media, post on your website and social media platforms, and speak to all of your networks. This is a tough time for many people, but you may have supporters that have the capacity to help you in a bigger way than you anticipated.

10 minute solicitation exercise: Use your donor database and program data to find 2-3 statistics that will allow you to create a quick 3-4 line case statement and send that out via all your communication channels.



“Donors want to know that their money is being used effectively; that there is a high ROI from their contribution. Impact communication is arguably the proverbial glue that holds your donor/organization relationship together. Thus, it is absolutely essential that you master effective impact communication if you would like to have a high donor retention rate”--

Haley Bodine

Prospecting

Although this pandemic has had a significant impact on how we live and work, that doesn't mean your organization should cancel all future plans. Your need for new equipment, or improved resources, or whatever else has not disappeared.

So, now is the time to continue developing your plans on how you are going to meet your goal, and specifically how you will **find donors** to support your goal.

Prospecting is the process of figuring out who your future donors are going to be. Do not assume that you have to look outside of your organization to find new donors. There can be many potential donors within your existing connections and your donor database.





Here Are Some Recommendations For How to Proceed

1. Start creating a prospect list by **looking at everyone that is already connected to your organization** such as:
 - Current donors
 - Volunteers
 - Personal networks
 - The networks of Board members
 - Members (if you have a membership based organization)
2. When we are prospecting, **look for the following information about your potential donors:**
 - Their capacity to give
 - Their support of similar organizations
 - Their past giving
3. **Allow your donor database to help you use your resources more efficiently.** For example, when deciding how you will communicate with your donors, first look at your database. Do you have some donors that are very engaged? Consider developing highly personalized communications for these donors. Continue to communicate with the remaining donors, however; these communications can be highly automated. For example, create a social media post or a general newsletter to share with these donors.

Automating as many activities as possible will save time for other valuable activities.

10 minute prospecting exercise: Look at your donor database and find the top 10 donors over the past year. This is a good group to begin creating customized communications for.

Stewardship

The COVID-19 pandemic may not have impacted your organization's bottom line; however, it has significantly impacted the lives of thousands of Canadians. In the month of March alone, Statistics Canada projected that over 1 million jobs were lost due to the pandemic. If your donors have been impacted, now is not the time to solicit gifts for your organization.

Despite the fact that many of your donors may have been hit hard, others may be in the same, or perhaps an even better financial situation. Though you may not be a front line organization with an urgent need, your future needs have not disappeared due to the virus. As such, it is important to stay in touch with your donors and continue to **steward** their prior gifts.

This time is a great opportunity to let your donors know that you are continuing to do important work during this pandemic, and still impacting the lives of those you serve. Your ability to be transparent and share future plans with donors will help you develop valuable relationships, thus improving your donor retention rate.



Here are Some Recommendations For How to Proceed:

1. **Reach out to your donors** via email and communicate the impact of the work you are still doing during this crisis. Take the time to contact your major donors by phone to see how they are doing. Be genuine, and show empathy for anyone who has been affected. Most importantly, remember that the purpose of your discussions are to communicate and thank donors for their prior gift. It is not the time to ask for future funding.

For other current donors who are not part of your major giving campaign, create a one page communication updating them on what your organization is working on. Share via email, post on your website, and/or social media platforms for all to see. Consider also sharing this document with volunteers who may not be donors.

2. **Focus on your engagement plan** for all donors. Although in person activities may not be possible right now, continue to engage your donors through your online platforms such as email, social media, or e-newsletter. If your community is not online and you have a budget for postage, use the mail to keep in touch with donors.

You do not have to create anything fancy with splashy graphics. A simple communication piece to stay in touch, show gratitude, or share testimonials of those who have benefitted from your organization can be very powerful.

Now is also a great time to brainstorm new and creative ways to keep your organization top of mind with donors.

3. **Be prompt in responding to your donors' questions.** If your organization has had a board meeting to discuss your plan during this pandemic, create a set of statements that all board members and staff can use to answer questions or concerns from your donors and the community at large. Even if your board is unable to have a discussion at this time, staff and key volunteers should all be armed with the same information so you can communicate a consistent message. If you lag on responses to donors who have questions, it can appear that you are not organized. Thus, it is important to develop a plan to share as much information as you have with your donors.

Don't forget that your donors are investors in your cause. They deserve to know, and want to know, how you are navigating this crisis.

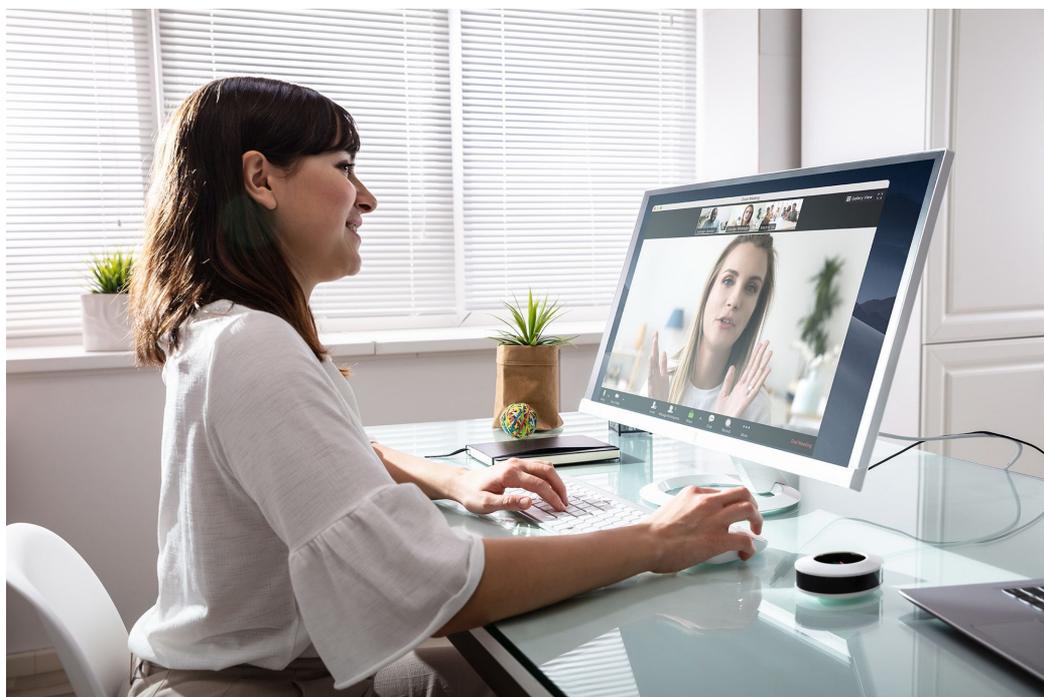
10 minute stewardship exercise: Craft a thank you statement for all donors and send it out immediately, and let them know what you are currently working on.

Cultivation

The pandemic has caused an increase in demand for many frontline workers. Although the media has focused on the hit to the healthcare system, many nonprofit organizations including food banks and homeless shelters have experienced a sharp increase in urgent need. Thankfully, Canada Helps has reported that Canadians have increased their giving during the COVID-19 crisis in response to this need.

If your organization has seen a recent increase in donations, you have a tremendous opportunity to expand your donor base. Many of your new donors may not have a relationship with your organization, but they trusted in your reputation and felt confident giving to your cause. Although your staff and volunteers are busy serving your community, it is still important to spend time looking for opportunities to **develop relationships** with new donors.





Here are Some Recommendations For How to Proceed:

1. With your recent influx of new donors, you may have new prospects for your major giving program. **Start reaching out to these donors (virtually) for meetings.**

Donors that give to urgent causes are often motivated by a feeling of moral obligation, so do not assume your new donors know what you do. This is a great time to have discussions with your top new donors and establish a relationship with them. In addition, tell them stories about the people you have helped and how they have benefitted from your work.

2. **Keep good notes on your discussions with these donors.** Ensure that you transfer what you learn about your new donors to your database. This will ensure that even if whomever attended the meeting leaves your organization, you will not lose the notes on your donor. In the future, you will be able to refer to your database for information on your donor's interests or other causes they have given to. As such, when you begin your next campaign, you may find that you have many prospects to draw on.
3. **Be patient.** Cultivation can take a long time, and it can seem like a lot of work, particularly when your job includes much more than fundraising. Still, it is necessary and the relationships you will build can last a lifetime.

10 minute cultivation exercise: Craft a message to tell donors what you are working on for the future.

A Word of Encouragement

We truly hope that this resource has been helpful and will encourage your team to confidently pursue your fundraising goals regardless of where you are at.

We wish you the best of luck as you complete your plan, and if you need something more comprehensive we're here to collaborate with you. Please contact us at info@storypoint.ca.



