  



**April 2021 Newsletter**

**How to Connect with Prospective Major-Gift Donors Now**

After a year of cancelling fundraising events and trying to replace them with online galas, nonprofits are wondering how to reach their key demographic of donors. As part of the Chronicle of Philanthropy’s Ask the Expert series we get some insight from 3 top executives to the following readers’ questions:

**What strategies are most effective for acquiring new major donors during these virtual times?**

**Should fundraisers ask major donors they have never met for virtual meetings, or should they start with brief introductory phone calls first?**

Although the focus has shifted to virtual events, “the process still comes down to adhering to the basics: identification, qualification, cultivation, solicitation, and stewardship, according to Michael O’Neill, senior vice president of university advancement at Villanova University.

When identifying donors “It’s imperative not be intimidated to reach out” he says, even if they’re not currently part of your institution. They may have more time these days, be looking for ways to give to compelling missions and may be ready to renew gifts they made you in the past. our current major donors and volunteers are great ways to initiate this.

Sarah Fonder-Kristy, chief development officer at the Atlanta Community Food Bank says you can put together a “video that shows who your programs help or a note from a beneficiary on the impact of your charity’s services”.

**Should fundraisers hold a virtual meeting with several major donors to explain the organization’s needs even though they might not know each other? If so, what are some tips for holding virtual meetings with groups of major donors in a way that won’t make them uncomfortable?**

First change the word meeting to visit, because it’s less intimidating according to Rachael Rosselli, regional philanthropy officer at the American Red Cross of Massachusetts. Start with a phone call if you can then follow-up with an email if you don’t reach them, treating it as a brief introduction. “Make sure you’re smiling during the call because your positive mood will make your donor feel connected and valued,” and know that even a negative outcome could bear fruit in the future. O’Neill recommends making the virtual experience as special as possible, like by “assembling a select cadre of like-minded donors from the same industry”.

**What if your major donors are mostly older and uncomfortable with virtual meetings? What strategies can make phone calls just as effective as a virtual meeting?**

Rosselli says it is best to mail the donor a packet with information ahead of the call so that that person can prepare for the conversation. “Most important, be sure to include a cover sheet for your packet that has your most professional-looking photo and professional biography to put a face to your name”.

Fonder-Kristy warns that nonprofits shouldn’t underestimate donors’ willingness to join a virtual meeting, but also that “Some donors will never want to have a Zoom meeting but could talk on the phone for hours”.

**2021 Predictions: The Role Nonprofits May Play in the Fight**

According to the Association for Fundraising Professionals the nonprofit landscape recently experienced a myriad of changes in the last year. “We’ve seen the rapid use of new registration and scheduling tools with respect to optimizing COVID tests and vaccine appointments. The focus of donors this year turned to support a variety of current social justice initiatives.”

The pandemic has forced us all to reevaluate what really matters and will help us look forward with predictions for the future:

* Nonprofit software will contribute to broader COVID-19 efforts.
* Nonprofits will benefit from increased feelings of trust from the public.
* Donating as a means to support topical issues will remain relevant.
* Planning and fundraising will continue shifting into the online space.

**Prediction 1: Nonprofit software will contribute to broader COVID-19 efforts.**

As vaccines became available late 2020, many healthcare organizations tried to optimize the registration process by using software tools. They have adapted general sign-up tools for use specifically with Covid-19 vaccine scheduling. Sometimes they post it on their health department or pharmacy websites, sometimes it’s emailed directly to those who qualify. Either way, this streamlines the process and contributes to broader logistical pandemic relief efforts.

Moving forward, community nonprofits may be asked to help with vaccination efforts and may need to purchase software to participate. According to Mike Barros, President and CEO of Lumaverse Technologies, here are some features to look for in scheduling software:

* **Custom landing pages**—Choose software that helps your team create a custom landing page to function as your vaccine appointment scheduling portal for your organization. Brand this page accordingly and display all your appointment signups in an easy-to-understand format. Participants can visit the page and locate the particular appointment sign-up that pertains to them. Be sure to organize your slots by date, time, or location.
* **Dedicated administrators**—If your organization aims to manage multiple registration pages for various locations, it’s suggested that you allow each location to manage its own signup process. Look for software that allows you to assign various administrators to each subsection of locations.
* **High data security**—Your data security is crucial, and a breach could tarnish your organization’s reputation. Be sure to choose your registration tool for its high-security measures that can keep you compliant.

Use of the one-dose and easier-to-store vaccines will accelerate in 2021 and beyond, and those who already have a sleek process in place will be an obvious solution.

**Prediction 2: Nonprofits will benefit from increased feelings of trust from the public.**

With all the interest around social justice, more people are contributing to their community’s public health organizations as well as those serving causes like racial injustice and climate change, so many nonprofits are tentatively expecting more contributions in 2021.

Nonprofits have remained the #1 trusted institutions in the U.S. because people largely believe their donations will be used in beneficial ways. So, during the pandemic although people spent less overall, they gave more to charity than they had the previous year.

For nonprofits, this is an opportunity to build on that renewed trust in your efforts and secure more donations. Competence and ethical behavior drive donations and nonprofits can stay abreast of current events and publicize the results of their efforts as well as their plans for the future.

**AFP Statement on Standing With and For the Asian American/Pacific Islander Community**

The Association of Fundraising Professionals (AFP), the largest community of charities and fundraisers in the world, has released the following statement from President and CEO Mike Geiger, MBA, CPA, regarding the rise in violence towards Asian Americans and Pacific Islanders in the U.S.:

“All of us in the AFP community—charitable fundraisers working to bring people together to improve communities and create philanthropic impact across the globe— condemn the growing violence against the Asian American/Pacific Islander community. We join with people across the United States and around the world in mourning the victims of the recent shootings in Atlanta, and resolve to continue our work in fighting for a fair, equitable and inclusive society free of racism and bias.

We condemn not only this particular incident, but the wave of discrimination and bias that has harmed these communities, and in turn, harmed our society. We must be willing to stand with them—and for them—every single day, not just when incidents like this occur. The future of our world is directly linked to helping all groups flourish and advance in our society.

I wrote last year after the murder of George Floyd that what we are seeing is the true fabric of our world—and frankly, always has been. These kinds of events are what people are experiencing and living, on a daily basis in communities big and small. This is the world in which we raise funds and provide services. If we don’t meet people in their world—and have empathy and seek to create change—then we are doing them, and our causes, a disservice. And we are not living up to the principles and values that undergird our work every day.

We are saddened by these horrific shootings, but they only serve to galvanize our commitment to bring about change that is long-lasting and impactful. We will continue to use our unique role as fundraisers—bringing people together—to unite communities and create greater understanding between peoples of all backgrounds. And in doing so, we will fight to ensure that the principles we espouse so much in our society—such as equity, diversity, fairness, compassion and justice, to name a few—become a reality."

**Grant Opportunities – Take Action Now**

As nonprofits found their revenue shrinking during the pandemic grant writing took on a more important role in many organizations. Rolando Damian Rodriguez, president of The Crosspoint Group found that many organizations were unprepared with personnel and expertise, but that a little work can further their goals tremendously.

To assess your preparedness to apply for grants and increase your chance of success in being awarded funds follow these tips:

1. **Do you have a Case Statement for your organization?**

Funders read an increasing number of requests and look for data and overall credibility. Your narrative must be cohesive, show what you’ve done in the past, some recent accomplishments, and what you will do with the grant money. This is your initial grant template and without it you won’ be able to make your case.

1. **Have you created a simple budget that supports your grant request and shows both a track record plus a clear need?**

The budget is very important to show how the funder’s investment will be wisely used. Writing a clear budget shows that your organization can clarify what it needs credibly and precisely by matching it to the request. Funders also want to see measurable outcomes and this needs to be stated very plainly and clearly.

1. **Is your program proposal easy to understand and credible, given your past work and track record?**

Are you asking for current operations or a new program that, for example, is responding to COVID-19? Both new and existing programs are valid, but the request must be evident and impactful to increase your chance of success. If you don’t have this expertise internally, invest in a grant professional.

1. **Have you done preliminary research to identify grantors, or do you need to start from scratch?**

There are many ways to research potential grantors, but you should go about it in an organized fashion. Does the grantor’s focus match your needs and proposal? Does the application deadline fit your capabilities and budget demands?

1. **What are you going to measure and report on?**

What will success look like to you? Is it what the funder wants to measure? It could be simply gathering demographic information on your clients to know who will be impacted by their dollars. Surveys are popular methods to gather information about the happiness of your consituents with your programs and their results. Analyzing these results is often not difficult and will serve as a template for the required reporting once you obtain a grant.

**Make Grants Happen**

Grant writing often exposes gaps in organizational readiness or program design that have to be improved to compete successfully. Gathering the required information can reveal poor recordkeeping, disorganization and poor choices in which grants to apply for. Missing deadlines is a lost opportunity for funders to see your good causes. The good news is that a little determination supported by a systematic and professional approach will yield great results.