



March 20, 2020

Dear Friends:

We at The Phoenix Philanthropy Group hope you, your family, and friends are healthy as the world deals with the COVID-19 pandemic, lifestyle and economic disruption, and stock market volatility.

We are working with many of our clients to adapt their communications and fundraising strategies during this time of challenge. In this note, we share recommendations that can help you and your organization maintain those important relationships with your Board members, volunteer leaders, community champions, prospects, and donors.

Be Consistent with Communications: Commit to continued and consistent communications with all constituents – internal and external – sharing how the organization is addressing and handling challenges of COVID-19 and demonstrating sensitivity to the needs and concerns of your employees, volunteers, audience, and community – as well as its prospects and donors.

Be Positive: Nonprofit organizations and institutions exist to make life better, and in a time of crisis, they can be a respite from fear and anxiety. Sharing positive images and messages from your work reminds people of the good you bring to the world, and that you will be there for them when this is over.

Be Sensitive to Personal Issues: Personalize your messaging whenever possible. While this is ideal whether in good times or bad, if someone with whom you are communicating is in a higher risk group, or has family members who are, share personalized best wishes for their continued good health.

Be Aware of Donors' Concerns: Individual, foundation, and corporate donors may be a bit nervous with the volatility in the stock market and may want to delay decisions on gifts, slow down payments on pledges, or structure more complex gifts with multiple assets, including legacy gifts. Some donors will focus their philanthropy on basic human needs, or away from capital investments to direct service or operational sustainability. This requires that volunteer and staff fundraisers are sensitive to donors' concerns and are patient and amenable to change.

Don't be Opportunistic. Be Authentic: Be authentic and genuine in your communications and your appeals for funds to serve those populations in need. If your organization provides services that are increasingly critical during this time, an appeal to fund those services, with deference to the pandemic and the market, is appropriate. Many of you are probably receiving special appeals from nonprofits and political candidates. Some of the political solicitations do not even acknowledge COVID-19 and what the public is dealing with. Alternatively, a former client of ours, New Pathways for Youth, recently sent an informational email with three things people can do to help support and protect at-risk youth: "Connect with one another

intentionally and often. Look out for those in your community. Donate.” They asked readers to donate “to the organizations in our communities that serve our vulnerable populations, who will be the hardest hit in the coming weeks and months” – without asking donors to contribute to their specific organization. This is a very effective, sensitive, and authentic way to share your message.

Close the Loop: If an ask has been made, don’t ignore it. Instead, email or – better still – call the prospective donor and say “In light of the challenges before us, let’s wait to discuss our proposal for four to six weeks, ideally allowing time for these challenges to pass. In the meantime, if you have questions or would like additional information, please let me know.” Such a message is respectful of their desire to wait but leaves the door open if they prefer to have that discussion now. If other, less formal follow-up is due, a similar message can be created and sent.

Be Disciplined: Internally, use this time to “get your fundraising house in order” so you can hit the ground running when the pandemic passes and the market calms. This may include updating databases, contact reports, and performance reports; refreshing marketing materials; reviewing your campaign fundraising and communications plans; and more.

Be Innovative: In challenging times innovation is born. You may recall that in the Great Recession of 2008-2009, many nonprofits saw increased partnerships and alliances, new ways of serving the public, and new ways of communicating with constituents. It’s about survival. Look at creative ways to provide your services, run your events, use technology, and work with your employees that are actually better than you’ve done in the past. This is the time to think creatively, be productive...and possibly look at other industries to explore new ways to do your work.

Celebrate Resiliency and Generosity: American donors are amazingly resilient. After the 2008-2009 recession, philanthropy rebounded quickly and reached record highs. People of all means continue to express their generosity in ways beyond philanthropic gifts – by volunteering, helping a neighbor, and communicating with a friend in need. Let’s celebrate, recognize, and applaud the many ways people give to one another and make their communities better.

You do important work and serve a vital role in our global community. We wish you the very best during this time and are here to assist you in any way possible.

With best regards,

Richard and the entire team at Phoenix Philanthropy