Fundraising in a Post-Pandemic World

AFP Southwest Florida Annual Fundraising Forum ● July 2021

AFP
Association of
Fundraising Professionals

Fundraising During the Pandemic

Highest Year of Charitable Giving on Record

- Wealthy more insulated

- Market recovery positioned Foundations

- Racial Justice motivated donors

- Fundraising innovations, donor outreach

  - Individuals ⬆2.2%
  - Foundations ⬆17%
  - Bequests ⬆10.3%
  - Corporate ⬇6.1%

Giving USA 2021
The Annual Report on Philanthropy for the Year 2020

Giving USA™
A public service initiative of The Giving Institute

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Results by Giving Category

Public-Society Benefit Orgs Experience Greatest Growth

Giving Categories	% Growth (2020 v 2019)	$ Value (in billions)
Religion	1.0	131.08
Education	9.0	71.34
Human Services	9.7	65.14
Foundations	2.0	58.17
Public-Society Benefit	15.7	48.0
Health	-3.0	42.12
International Affairs	9.1	25.89
Arts, Culture, Heritage	-7.5	19.47
Environment, Animals	11.6	16.14

Giving USA 2021
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GI | Giving USA™
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Researched and written by
IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

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Poll.

Who's In This Room?

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The Resiliency Group

Your long-haul partners in building resiliency and community relevancy.

Here For You

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Understanding your Data

Clear dashboards to gain perspective on your data

Benchmarking with Peers for Re-assurance

Is my 'record-low' still 'best-in-class'?

Robust Aggregate Data for Policy Makers

Large sample of what's actually happening now – not a survey

National Learning

Who is bucking the trend? How are they doing it?

Quick Facts

Context to support development campaigns

International Understanding

What policies and practices are aiding recovery most swiftly?

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/PURPLE SEVEN/

COVID-19 Sector Benchmark
Insight Report 6: January 2021

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*Real-time intelligence on the impact of COVID-19*

COVID-19 and Philanthropy – Giving in 2020

Executive Summary – Key Findings

- Data from 141 CRMs of arts venues show very diverse results for the year.
- Aggregate gift revenue received in 2020 was down on both sides of the Atlantic, although the number of gifts was up in North America.
- Organizations who raised less funding from individuals in 2019 were more likely to increase their philanthropic income in 2020.
- There was growth in the number of smaller gifts in both markets, correlating with reports of revenue for cancelled shows being converted to gifts rather than refunds.
- Compared to 2019, organizations in both territories have been more reliant on re-engaging past patrons who have not purchased tickets or given for at least 18 months.

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Below the fold…

- Surprising Major Gift Results
- Growth in Smaller Gifts
- Relationship Reengagement
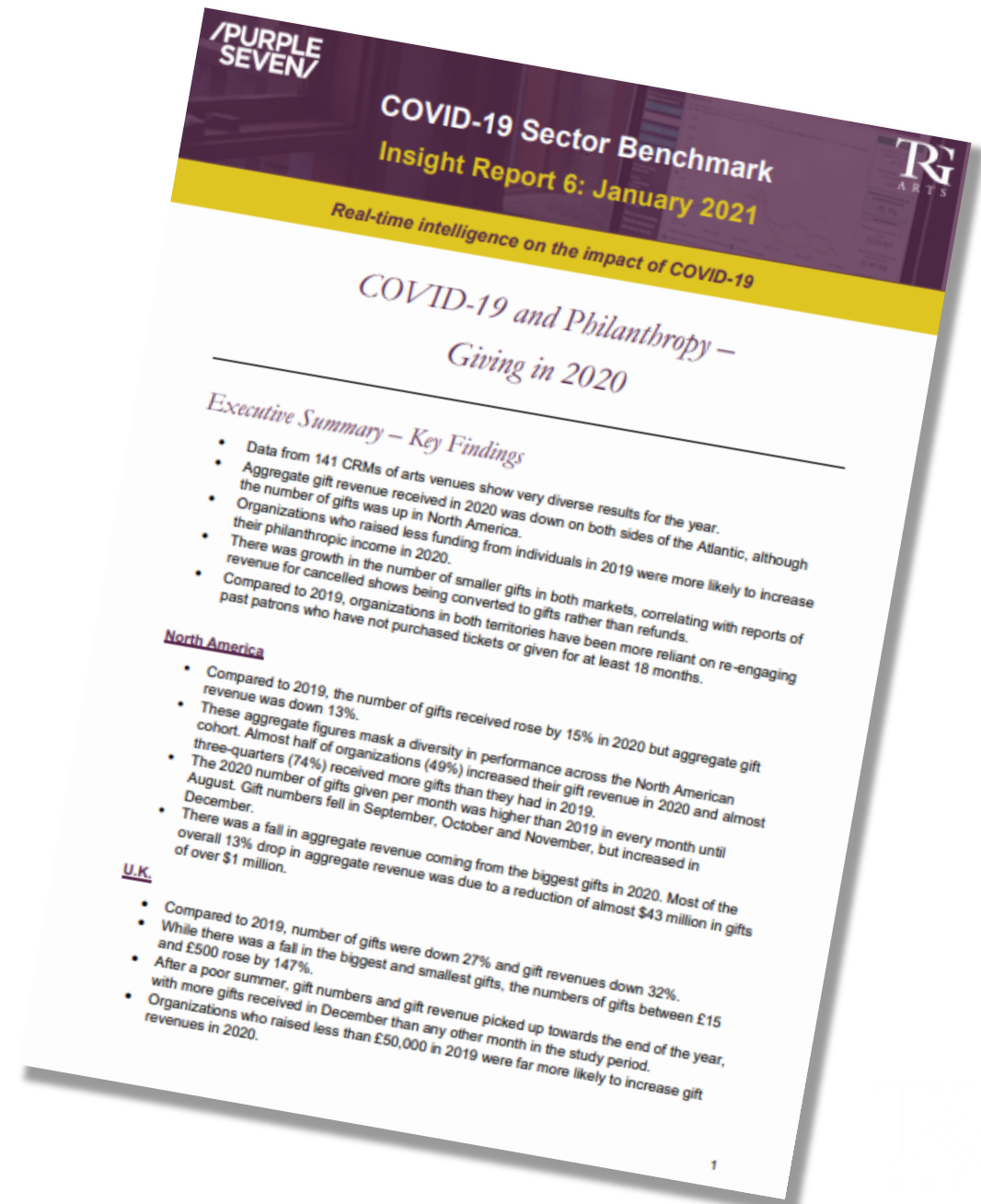
Poll.

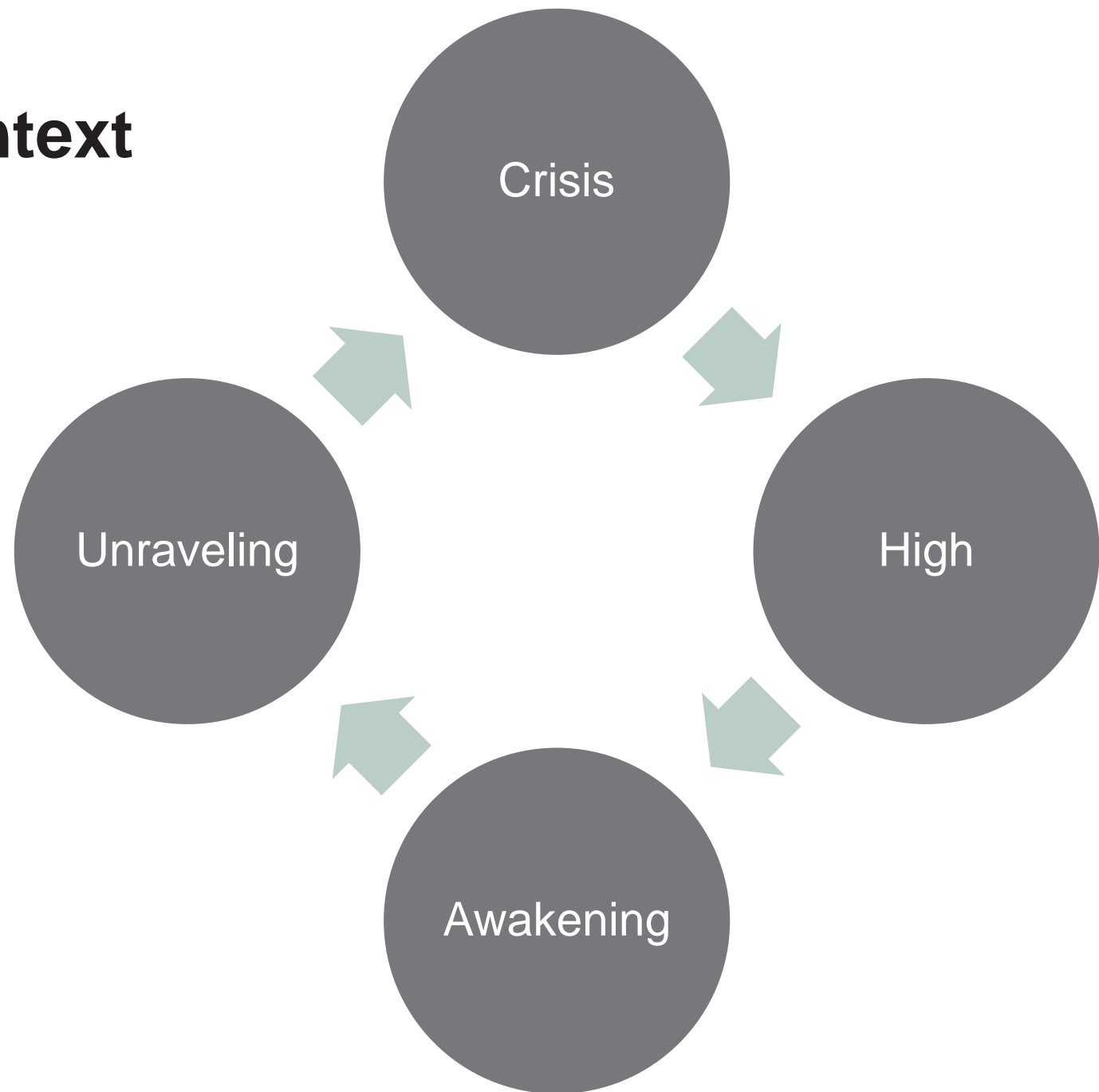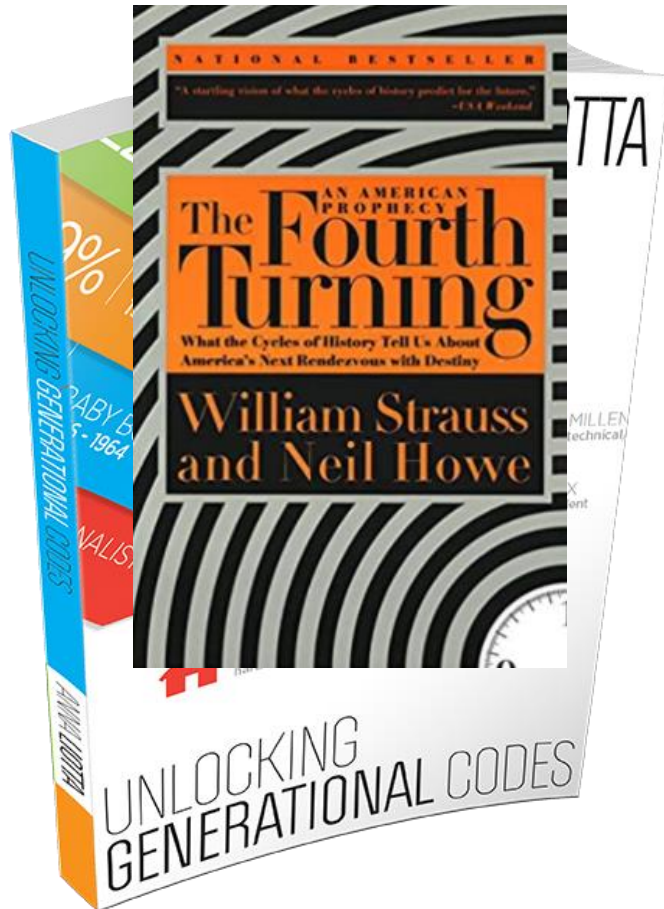What did *you* see in 2020 individual philanthropic results?

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Your *organization* has gone through this, too.

- **How do these concepts apply** to your organization?

- **Will your organization require changes** now to adapt to the future**?**

- **Creativity**: What do you believe about the need for creativity to fuel resiliency?

Larger Societal Context

You will not survive through the **CRISIS** unless…

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"**...you** reexamine and reevaluate what is important, and look for new ways to **take care of your internal and external clients...**"

"CRISIS must be a time of **evolving and completely re-examining… recreating yourself from scratch.**"

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RELATIONSHIPS

INNOVATION

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Three Recommendations for post-pandemic Fundraising Success

We must prioritize RELATIONSHIPS.

SILOS are old news.

Organizational LISTENING..

Relationships? We must culturally prioritize and *empathize* with PEOPLE.

- **Use data to understand them.**

- **Then, act like and really KNOW them:**
  - New segments? We need to empathize with and speak to them directly and well.

- **Create organizational alignment.**
  - Proportion of income today
  - Potential tomorrow
  - **Elevate to executive and board**

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And then, segment.

Align your segmentation with relationship realities

No…. not *exactly* like you've always done.

- Influx of first-time donors?

- Members with money on account?
  - First Year v. Multi-Year

- Event attendees who donated tickets?

- Sustaining / Major Donors

- Class attendees who stuck with you on Zoom

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Use Your Empathy!
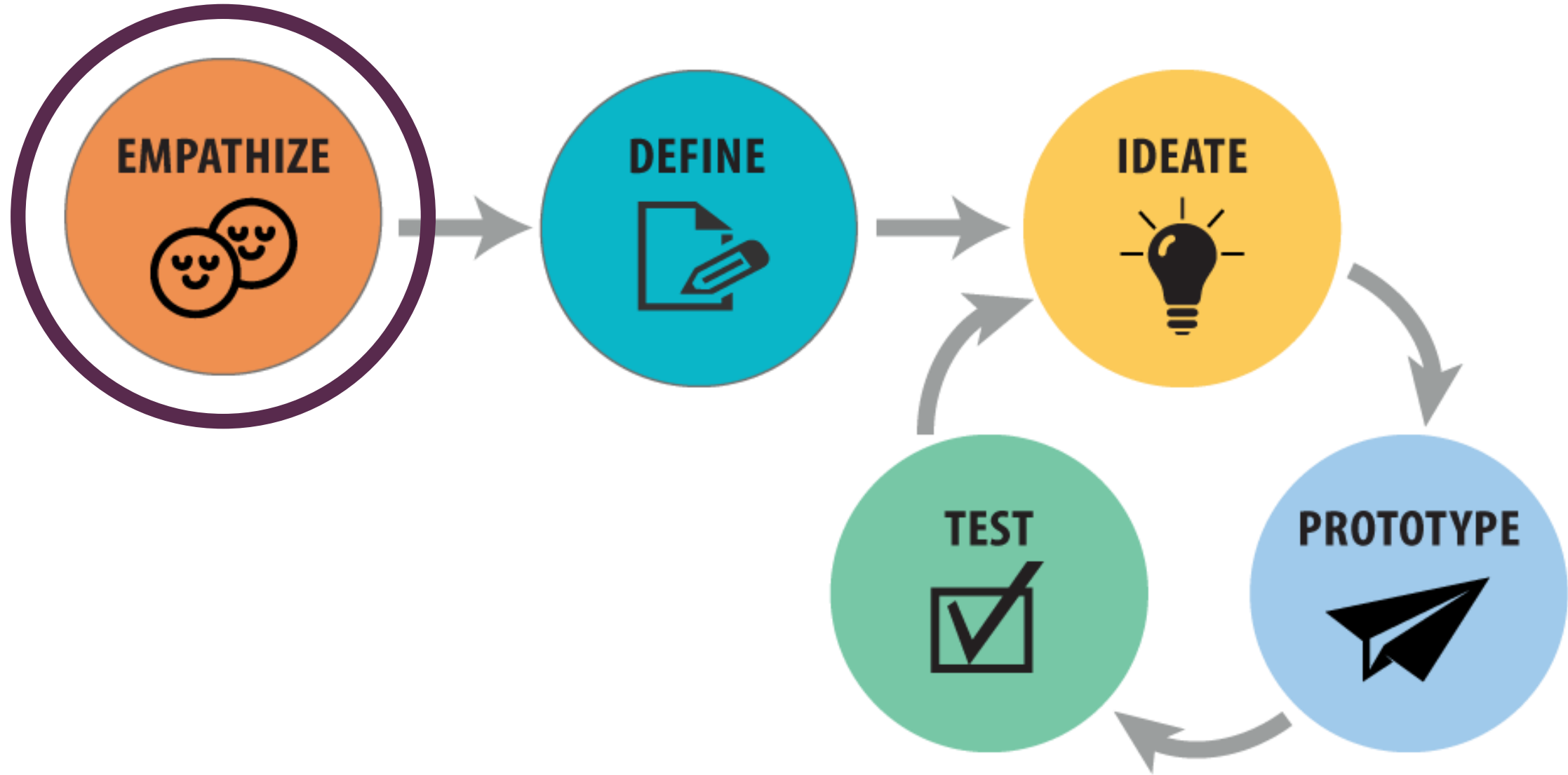
Step into their shoes.

What do *they* need or want from their relationship with *you*?

- Write a list of realities and values for each segment.
  - If you have existing survey data here, use it!

- Identify the problem you're solving or opportunity you're creating for each segment.

- EACH. SEGMENT.
  - The answers might not be the same for everyone in your database.

- Then, ideate ways to solve for each segment and **test it**.

Alignment required:

…to ensure ORGANIZATIONAL follow-through with your intentions.

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SILOS are old news

- **The Right Message to the Right Segment at the Right Time**

    - This REQUIRES collaboration between development and other departments to harness the *creativity* and discernment you'll need
    - Use the data-driven relationship pathway to organize the work
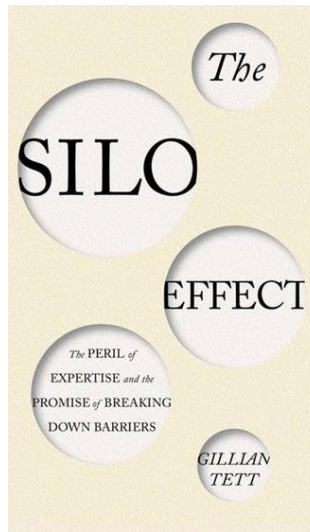   - You've already been here!

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The SILO EFFECT

The PERIL of EXPERTISE and the PROMISE of BREAKING DOWN BARRIERS

GILLIAN TETT

"Mastering silos is not a task that is ever truly completed, but a work in *progress*."

1. Information hoarding or incentive-hunting practices that are about the individual, department, division, *not the whole*.

2. Product delivery that doesn't meet consumer need, or is ultimately confusing or inadequate.

3. Organizational/sector-wide CRISIS. Could be in:
   - Communication
   - Understanding, knowledge
   - Functioning, operations
   - And more.
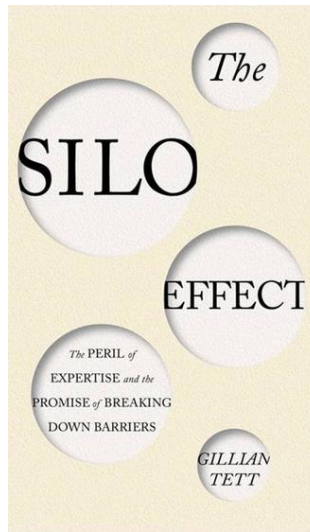
1. It pays to keep boundaries fluid, especially in bigger organizations. Rotating staff, creating PLACES where people can collide…

2. We need to think about pay and incentives.

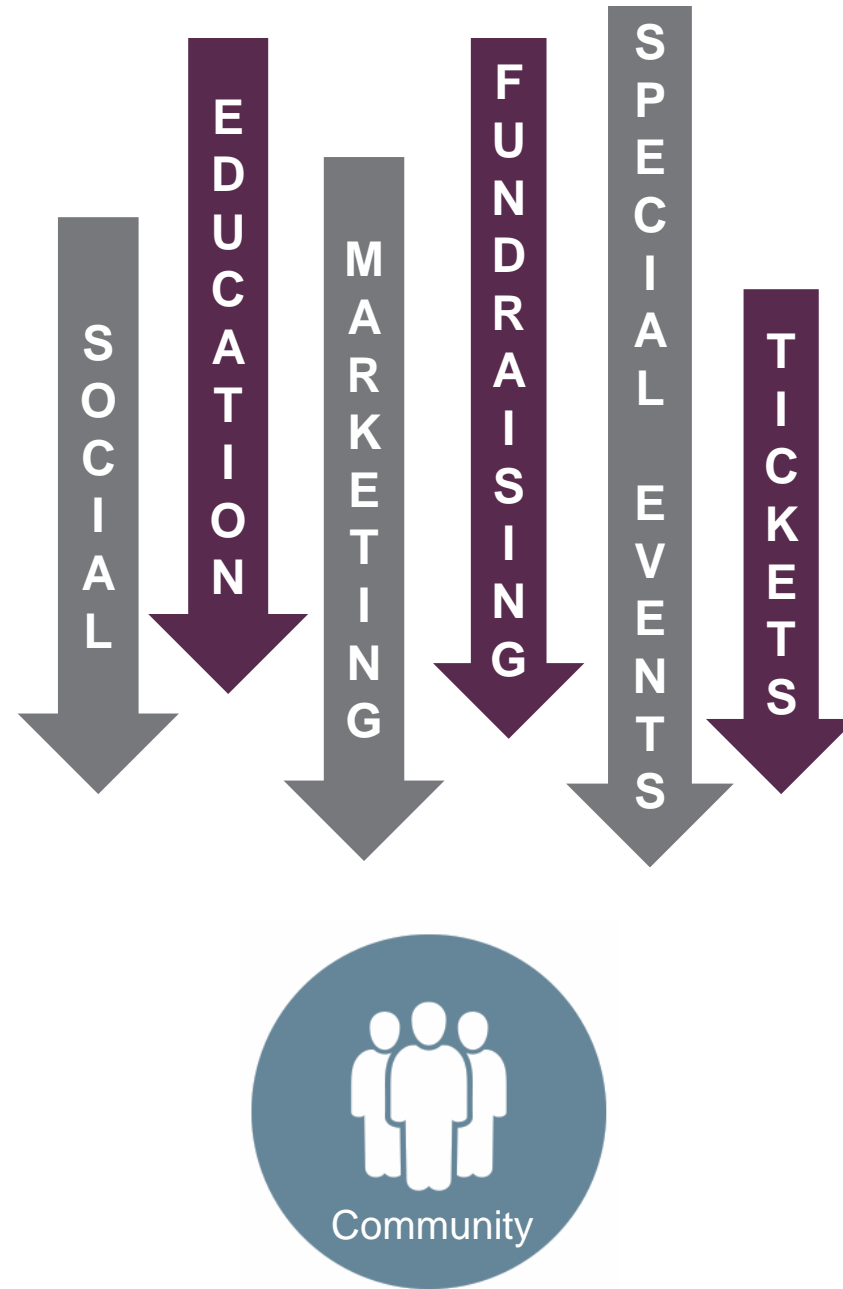3. Information flows matter.

4. Create "cultural translators".
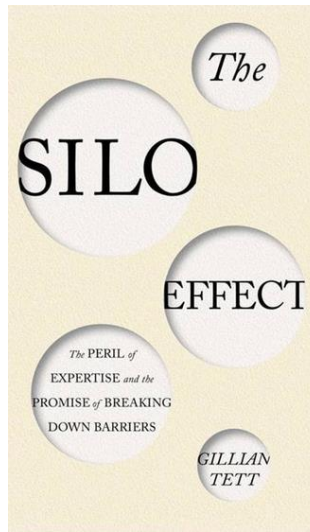
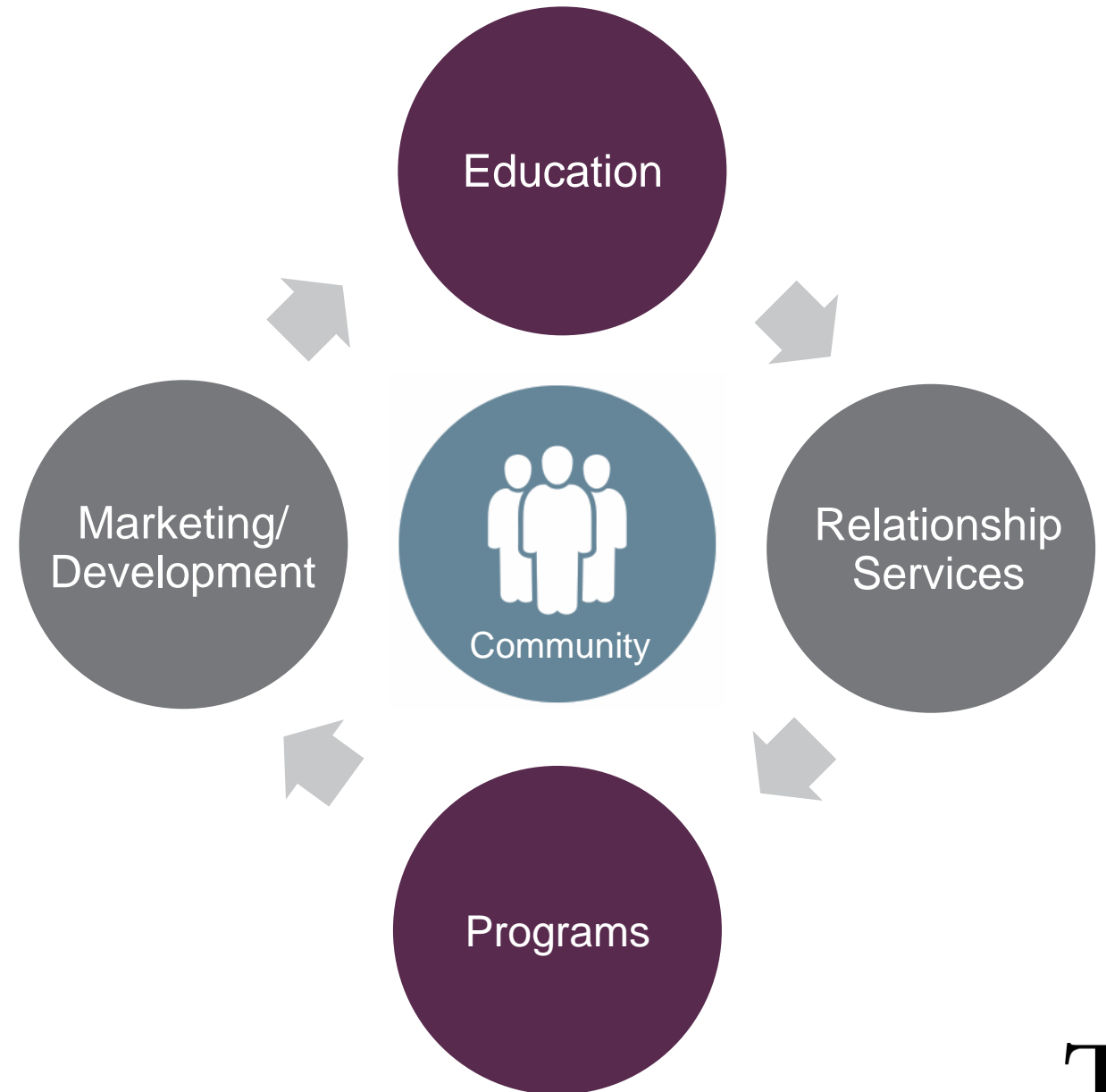Now it is more important than ever to put those you **SERVE** at the **CENTER.**

New Needs?

GREAT TEAM

C.Kelly

P. Brandt

Paul Torres

SPECIAL TEAM

Alice

Susanne

Judy

Mark

AMAZING TEAM

M.Burne

B.Graham

H.leon

Simon

N.Ellison

CREATIVE TEAM

Sara wirth

New Structure?

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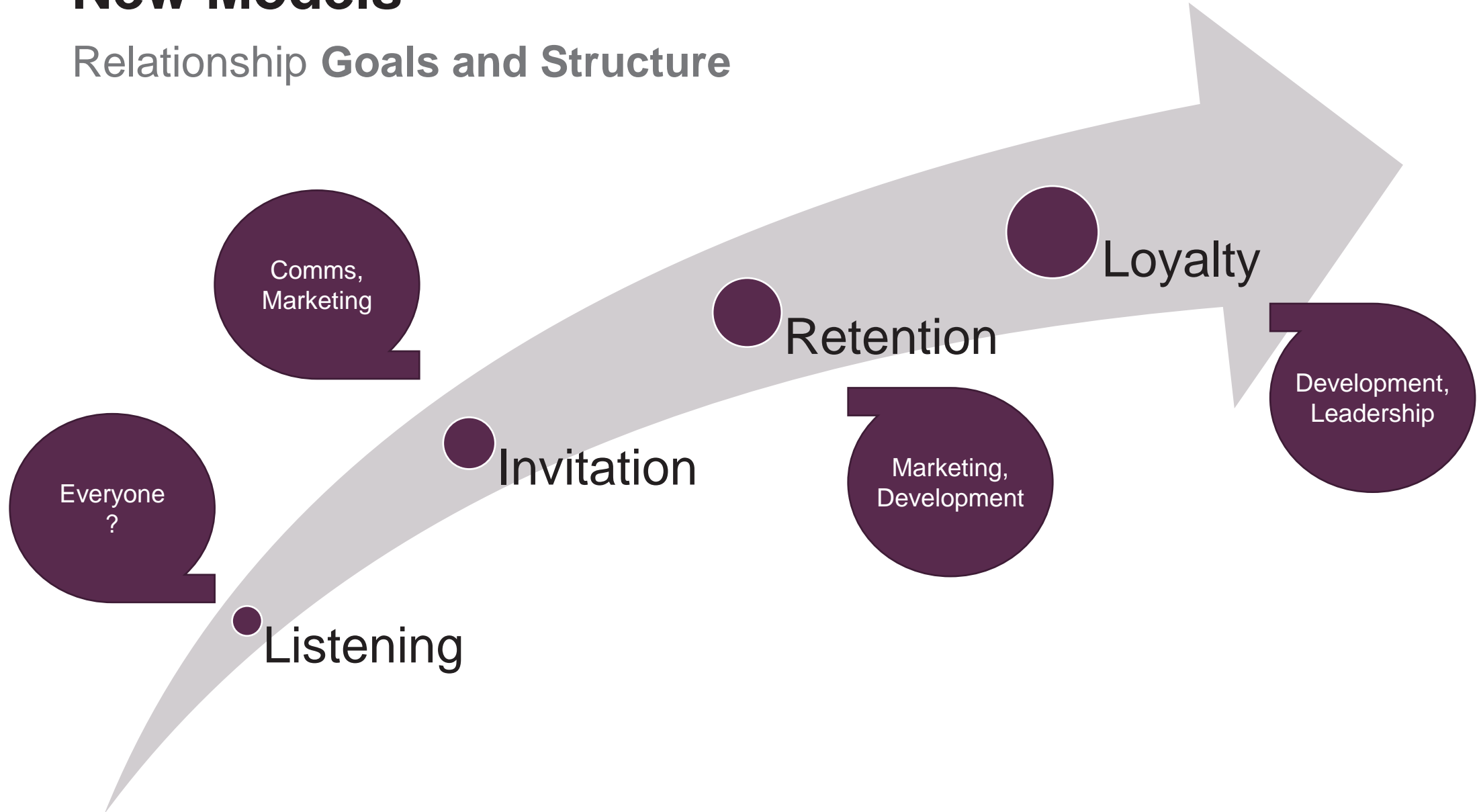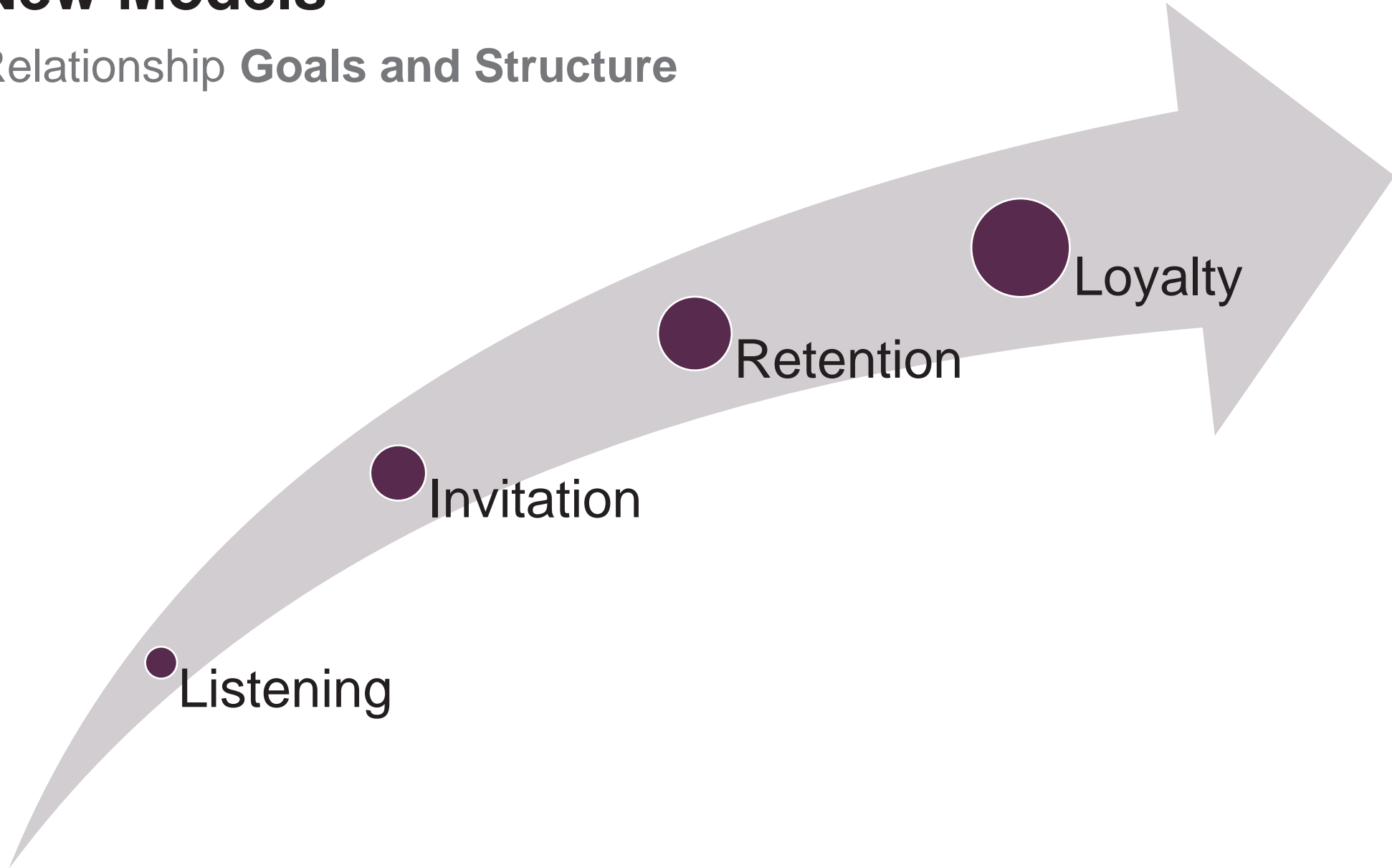
# Your teams may need to work and act differently.

- You may need a cross-functional team.

- That enables you be both REACTIVE & PROACTIVE.
  - Integrate all relationship comms into one calendar.

- Meet WEEKLY to assess campaigns, business realities, national/regional trends.

- Rely on data.

- Use Cultural Translators for the common good.
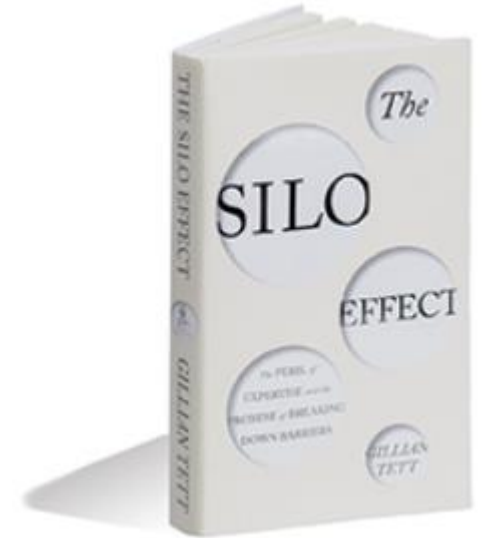
Develop the listening muscle.

- **Internally: Listen to each other to get the full picture and optimize campaigns.**
  - Development: expert stewards
  - Marketing: scaled campaigns
  - Guest Services, Member Services: direct line to people

- **Externally: Ask questions. <u>Then don't talk</u>.**
  - To serve your community, you must know what they're thinking and feeling.
  - Create formal mechanisms: surveys, open houses, 1:1 meetings, etc.

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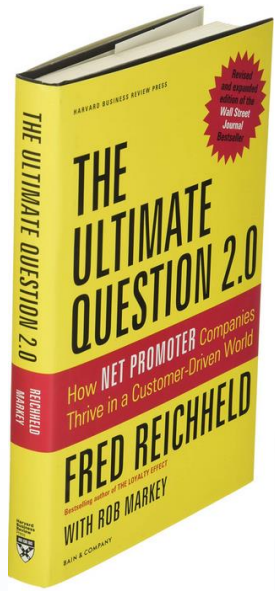
Net Lives Enriched
The Golden Rule.

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TRG Field Survey

Are we asking?

- **1,700 arts leaders**, 12% response rate

- **86% regularly survey**:
  - 90% post-experience
  - 40% annual baseline
  - 30% artistic/curatorial

- 60% ask NPS question; 18% as stand-alone

- *35% ask for open-ended response narrative*
  - *Of that, just 25% close the loop and TALK to those w negative feedback*

only **15**%

of arts & cultural organizations who survey their patrons follow up and talk to responders to more deeply understand their feedback.

Source: 2018 TRG Arts Field Survey on Net Promoter System use in Arts & Culture. Learn more: go.trgarts.com/2018NPS

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We must prioritize PEOPLE.

SILOS are old news.

Organizational LISTENING.
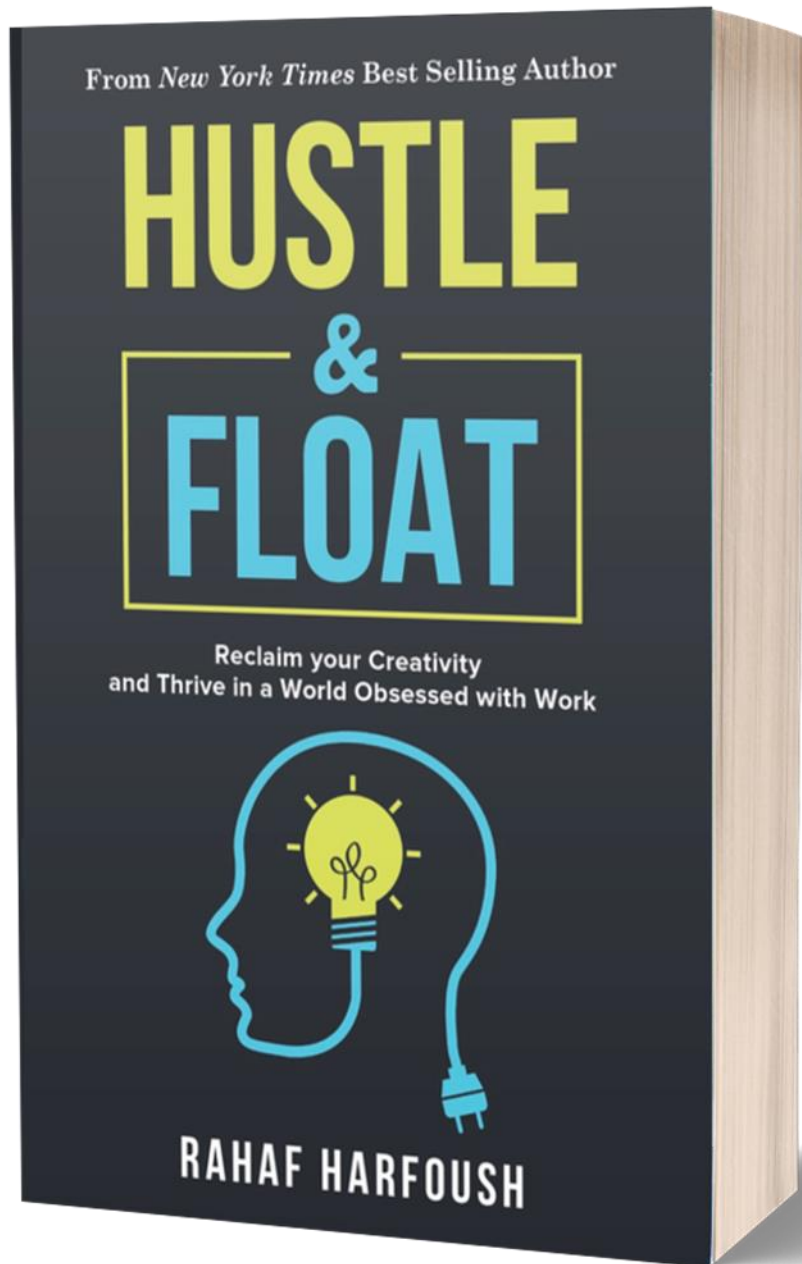
Downtime is an essential necessity for the brain to recover and operate. *Step away from the tech!*

Creative work is different and requires a different approach.

If we want to perform like professional athletes, we need to train like a professional athlete…

Hustle AND Float…

The Resiliency Group

Your long-haul partners in building resiliency and community relevancy.

Here For You

Contact us

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