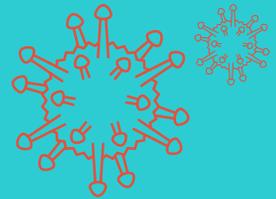


DRAFT

# COVID-19 EMERGENCY CAMPAIGN FUNDRAISING GUIDEBOOK



APRIL 2020



# CONTENTS

This simple guide has been produced to assist nonprofit organizations conceive a special fundraising appeal in the wake of COVID-19.

A Special Plan	3
The Basic Steps	5
Sample Campaign Timetable	7
Documents Required	8
Basic Communications	9
Suggested Talking Points/Telephone Script	13
The Funding Guide	14
Website Home Page	15

# A SPECIAL PLAN

---

The simple guide has been produced to assist nonprofit organizations conceive a special fund raising appeal in the wake of COVID 19. While nonprofits represent a diverse array of services and functions, all are affected and immediate financial implications. This guide is designed to help craft a special appeal in an organized and methodical fashion, in order to give your donors a clear and straightforward way to respond:



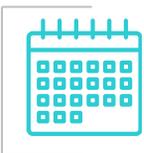
## • The Imperative

- **Cash:** An immediate cash need
- **Focus:** Refocus the development function
- **Communication:** Continuous stakeholder contact and engagement
- **Direct Appeal:** A well-crafted, well-coordinated special appeal
- **Stay the Course:** Keep your overall fundraising plans, but pivot for now



## • A Short-Term Plan

- Segment your donor base
- Plan a series of communications
- Establish a special fund or funds
- Create simple, clear documentation
- Draft clear and direct talking points
- Train your staff and key leadership
- Initiate a special campaign appeal
- Communicate directly and personally with stakeholders
- Document pledges and gifts
- Provide updates and accountability



## • A Structured Timetable

- Week-by-week plan
- At least 12-16 weeks

# A SPECIAL PLAN

---



- **Strategy Considerations**

- Initiate personal discussions with key board members and top donors
- Secure a half dozen significant advanced commitments
- Seek challenge and matching gifts: 1:2, 1:1, 2:1, 1:3
- Approach board leaders first, then major donors, then everyone else
- Set an achievable goal
- Articulate the impact of reaching the goal



- **The Request**

- Ask donors to support over and above their annual support
- Ask donors to continue their special event support. despite cancelling or postponing those events
- Ask foundations to lift restrictions on grants, so funds can be used for general purposes
- Ask annual supporters to accelerate their payments

The key task is to plan a series of steps, over the next 12 weeks or so, to ensure that your stakeholders have a clear sense of the challenge, and are given specific guidance on how their support can make an immediate and critical impact.

# THE BASIC STEPS



## 1. Establish A Fund or Several Funds

- Develop a brief informational statement about each fund. (New program, existing program, research, beneficiary aid, employee fund, other)
  - Purpose
  - Usage
  - Allocation
  - Impact



## 2. Segment Your Entire Donor & Stakeholder File

1 <sup>st</sup> Tier		Board members and largest donors
2 <sup>nd</sup> Tier		Close friends and other major donors
3 <sup>rd</sup> Tier		All other donors
4 <sup>th</sup> Tier		Everybody else on your list



## 3. Initiate Personal Communication Strategy

- The Basics
  - Personal phone calls to **Tier 1**
  - Highly personal emails to **Tier 2**
  - Slightly personal emails to **Tier 3**
  - General emails to **Tier 4**
- Personal contact and engagement strategy
  - Personal telephone calls
  - Personal video calls
  - Highly personalized emails
  - General emails
  - Structured conference calls and video conferences
  - Robot calls from organizational leadership

# THE BASIC STEPS

---



## 4. Prepare A Funding Guide

- 4 Parts
  - Outline of impact of the crisis
  - Purpose of the emergency fund
  - Suggested gift levels
  - Payment method
- Challenge gifts and matching gifts, if possible



## 5. Launch an Appeal

- Send personal communication expressing:
  - Concern for your stakeholder's well-being
  - Explain how COVID 19 is affecting your organization.
  - Creation of a special fund and its purpose
  - "Our donors have asked how they can help..."



## 6. Imagine A Virtual Pledge Drive (in Reverse)

- You call them
- You explain the need
- You suggest the giving amount
- You encourage a monthly giving plan
- You explain payment method
- You document the pledge
- You thank the donor



## 7. Follow Up Requests

- Ensure that your initial requests are followed quickly by personal outreach from organizational leadership
- Success requires several communications and reminders to your stakeholders



## 8. Regular Updates

- Each donor should receive a personal *thank you* and regular updates on the progress of the fund
- All stakeholders should receive regular progress updates

# SAMPLE CAMPAIGN TIMETABLE

Month 1: April 2020	Month 2: May 2020	Month 3: June 2020
<ul style="list-style-type: none"> <li>• Segment the donor file</li> <li>• Private conversations requesting the financial commitments from key leadership</li> <li>• Establish your emergency fund case</li> <li>• Draft initial communications</li> <li>• Established web page</li> <li>• General announcement of special fund</li> <li>• Send 1<sup>st</sup> Tier appeal</li> </ul>	<ul style="list-style-type: none"> <li>• Special fund update</li> <li>• Send 2<sup>nd</sup> tier, 3rd tier and 4th tier appeals</li> <li>• Personal telephone and email follow up to top priority stakeholders</li> <li>• Thank you, and acknowledgement, to donors</li> <li>• Update special campaign web page</li> </ul>	<ul style="list-style-type: none"> <li>• Special fund update</li> <li>• Special announcements</li> <li>• Follow up communication to 2<sup>nd</sup>, 3rd and 4th tier appeals</li> <li>• Continued personal telephone and email follow-up to top priority stakeholders</li> <li>• Update special campaign web page</li> </ul>

# DOCUMENTS REQUIRED



- **Intro Letter**  
Introductory letters, segmented by donor level
- **Special Funds Details**  
First follow up letters, outlining the details of the emergency funds being created
- **Gift Request**  
Second follow up gift request letter, with funding guide
- **Funding Guide**  
Crisis impact, special fund description, giving menu, payment instructions.
- **Infographic. The Crisis Impact**  
Summary of the impact on the organization
- **Infographic: The Special Fund**  
Outline of the purpose and structure of the emergency fund
- **Giving Menu**  
Outline of the giving levels and methods: gift levels, purpose, payment plan, methods of giving, payment instructions
- **Thank You Letter and Gift Acknowledgement**  
Gift documentation
- **Special Fund Update**  
A series of newsletters
- **FAQ**  
Frequently asked questions

# BASIC COMMUNICATIONS

## 1<sup>st</sup> Communication Concern and Impact

Date:

Dear...

Hope you are well and keeping safe ...

Hope this crisis is not having undo stress on you and your family ...

The impact of the crisis on our organization has been significant...

Programmatic impact...

Employee impact...

Financial impact ...

Thank you for your ongoing support and concern...

We plan to keep you updated...

Stay safe and best wishes...

XYZ Institution | 123 Any Street | Somewhere, ST 10000

## 2<sup>nd</sup> Communication Impact and Special Fund

Date:

Dear...

The impact of the pandemic on our organization has been significant

The pandemic has required us to ...

The impact on our team has

Many have asked how they can help

We are establishing a special emergency fund...

We will provide more information shortly...

Thank you for your continued interest and support.

XYZ Institution | 123 Any Street | Somewhere, ST 10000

# BASIC COMMUNICATIONS

## 3<sup>rd</sup> and 4<sup>th</sup> Communication Special Fund Request(s)

Date:

Dear...

We have established a fund...

The purpose of the fund is to...

The fund will support...

The impact of the fund will be...

Many are asking how they can help at this time.

The need is urgent.

Please consider one of the suggested gift plans...

A member of our team will be in contact with you by phone or by email.

The accompanying funding guide outlines the impact of the crisis on our organization, the basic details around the fun we have established.

The suggested gift plans that can make a real impact on our short term challenges.

Payment methods and other details to make your gift as easy as possible to make.

Thank you

XYZ Institution | 123 Any Street | Somewhere, ST 10000

## Thank You and Acknowledgment Letter

Date:

Dear...

Thank you for your generous support in the amount of ...

Your support will be applied to the special emergency fund...

We will provide regular updates on the progress of the fund and the allocation of the support we've received to the fund ...

You're supported this time cannot be overstated...

The employees and the staff and the beneficiaries of our organization deeply appreciate your support ...

Thank you

XYZ Institution | 123 Any Street | Somewhere, ST 10000

# BASIC COMMUNICATIONS

## Regular Fund Update

Date:

Dear...

We pledged to provide regular updates to our donors on the emergency fund...

As of date we have received a total of in pledges to the fund and a total of in cash paid commitments...

This is having a substantial impact on our organization in the following ways...

Thank you for your generous support and your continued interest in our staff, our programs, and the beneficiaries of our work...

We look forward to the opportunity to thank you in person and once again return to our regular operations...

Thank you for your generous support.

XYZ Institution | 123 Any Street | Somewhere, ST 10000

Communication and personal followup are an integral part of this special fundraising campaign.

# BASIC COMMUNICATIONS

## Frequently Asked Questions

How has COVID 19 affected our organization?

- answer

What is the purpose of the special emergency fund?

- answer

What is the current monthly financial shortfall?

- answer

How will the fund have contributed be allocated?

- answer

How can I give?

- answer

How can I help in other ways?

- answer

Will we receive updates on the progress of the fund?

- answer

What other resources are available to the organization?

- answer

Are there any provisions in the recent federal legislation that are available to our organization? Are there any state or local public funds that are available?

- answer

Is the organization able to get a line of credit and access to any special loan facilities?

- answer

# SUGGESTED TALKING POINTS/ TELEPHONE SCRIPT

---



“Good afternoon.”

“Thank you for taking the time to speak with me today on behalf of our organization.”

“I’m calling on behalf of our leadership and all of those who benefit from our work.”

“As you are well aware the COVID pandemic crisis has had a dramatic impact on our work we wanted to reach out to you today too first of all extend our best wishes and hope that you and your family are well.”

“We also wanted to let you know how the current crisis is affecting our organization and give you the opportunity to support us in whatever way you can.”

“The pandemic crisis has affected us on several levels.”

“Our programs and services have been reduced or suspended in the following ways... “

“Our staff and employees have been affected in the following ways...”

“The crisis has also had a dramatic impact on our financial situation, as follows...”

“In response to this we have created a *Special Emergency Fund*.”

“The purpose of the fund is to provide emergency support for the following activities and for the general operations of the organization.”

“We hope that you would be willing to consider one of the special gift plans that had been developed to help donors to guide donors in there thinking about support.”

“I’m happy to review each of these gift plans with you now.”

“We don’t know what you can do but we know what it would mean if you can support us at this critical time.”

“Thank you”

# THE FUNDING GUIDE

<h3>The Impact of the Crisis on our Organization</h3> <p>The COVID-19 crisis has had dramatic impact on our organization.</p> <p>The crisis has impacted us on several levels as a result of the crisis we have had to suspend...</p> <p>As a result of the crisis our employees have been affected in the following ways...</p> <p>As a result of the crisis our financial position has been affected as follows...</p> <p>Our immediate priority is to ensure that we can protect our employees, provide basic resources to our stakeholders and beneficiaries, and sustain our work so that we are in the best position for recovery.</p> <p>Many people have asked how they can help and in response we have created a Special Emergency Fund</p>	<h3>Suggested Gift Plans</h3> <p>All gifts and offers of support financial support are especially critical at this time</p> <p>To assist our donors and understanding how they can help us in the most direct and impactful ways we have established the following suggested gift plans</p> <p>All gifts at any level will help her organization to meet the challenges of this crisis</p> <p>Please consider supporting us in one of these significant ways:</p> <ul style="list-style-type: none"><li>&gt; \$25,000: Will fund...</li><li>&gt; \$10,000: Will finance...</li><li>&gt; \$5000: Will help ...</li><li>&gt; \$1000: Will support...</li></ul>
<h3>The Special Emergency Fund</h3> <p>In response to the COVID-19 crisis we have created a special emergency fund</p> <p>The purpose of the fund is to provide immediate support for the essential operations of our organization</p> <p>special emergency fund will provide support for the following immediate priorities</p> <ul style="list-style-type: none"><li>• programmatic priorities (description)</li><li>• employee support (description)</li><li>• general operating support (description)</li></ul>	<h3>Payment Instructions</h3> <p>All gift payments can be made payable to the name of the organization.</p> <p>Gifts of cash and checks as well as securities are welcome</p> <p>Gifts can be paid in full or in a payment plan over the course of the year</p> <p>For some donors a monthly automatic debit may be preferable</p> <p>Please make checks payable to ...</p> <p>You can donate directly on our website at the following URL</p>

# WEBSITE HOME PAGE



## Home Page

- Announcement that a special fund has been established
- Many have asked us how they can help, and we have established a special emergency fund
- Brief description of the purpose of the fund
- This is an urgent need please click the donate button below to contribute



## Donation Page

- How to donate to our special emergency fund
- Please consider one of the following suggested gift plans
- Gift name. icon. dollar amount

Gift	Amount	Impact
Platinum	\$25,000	Will fund a...
Gold	\$10,000	Will finance a...
Silver	\$5,000	Will help a...
Bronze	\$1,000	Will support...

- Thank you for your generous support of the special emergency fund

Thank you.



[ccsfundraising.com](https://ccsfundraising.com)



800.223.6733



[ccsnewyork@ccsfundraising.com](mailto:ccsnewyork@ccsfundraising.com)

