



BWF Client Partner Series

Josh Birkholz and Mark Marshall



- Welcome! We are glad you have joined us.
- Use the Q&A Feature to ask questions.
- Any unanswered questions will be addressed individually after the webinar.
- Share your thoughts with us by using **#bwfwebinar**.
- For technical challenges, support is available by emailing bwf@bwf.com.

Upcoming Opportunities



#BWFCClientPartner Series Webinar

Tuesday, May 12, 2:00pm EST/1:00pm CST

Defining Organizational ROI While Facing Budget Constraints

hosted by Jason Boley and Josh Birkholz

As your organization reevaluates its budget for the post-pandemic future, how can you prepare for conversations regarding return-on-investment for staff who influence revenue directly (fundraisers) and indirectly (operations)? BWF's Josh Birkholz and Jason Boley will review these important considerations to help you inform your budgetary conversations and decisions.

Let's Talk! Roundtable Sessions

Intimate, face-to-face sessions with BWF's experts and a small group of industry peers to discuss the successes and challenges related to your areas of organizational responsibility.

Thursday, May 7, 2:00pm EST/1:00pm CST

Lets Talk! – My CRM is facing End-of-Life: Mobilization Strategies

hosted by Jason Boley and Steve Birnbaum

As organizations are dealing with budget cuts, how are they preparing for CRM changes that are stemming from end-of-life considerations?



Planning for Philanthropic Success in the New World of Disruption

Josh Birkholz and Mark Marshall

Agenda

1. Making the case for philanthropy.
2. Reshaping your philanthropy program in the disruption.
3. Questions.

Reminder: Key Lessons Learned from Previous Events

- **Consistency.** Organizations that have stayed focused on philanthropy have seen the biggest returns on investment.
- **Take the long view.** The economy regains its momentum over a period of time, sometimes surprisingly quickly, others in unexpected ways.
- **Generosity.** Donors step into the gap to fill critical need of the philanthropic organizations that are important to them.
- **Mission.** The world needs its great organizations more during these periods.



Making the Case for Philanthropy

Simple Math—Solving a Problem

- Philanthropy professionals should drive their programs to increase the denominator.
- Accountants will want to fix the denominator by cutting costs thereby lowering the denominator.

Increase Revenue

$$\frac{4}{1}$$

Or

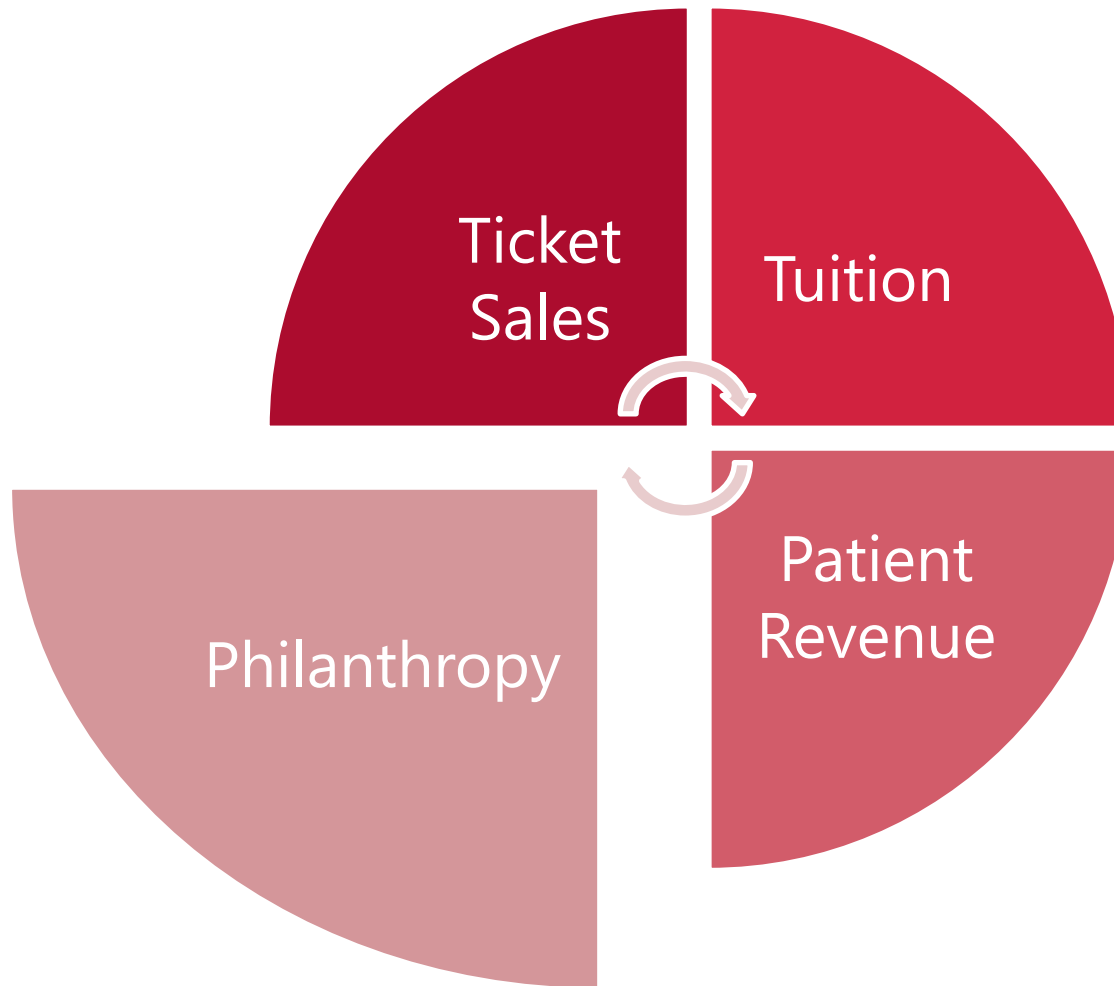
Decrease Resources

wikiHow to Convert a Whole Number to an Improper Fraction

Understanding Your Organization's Business Model

Sources of Revenue	Impact of Disruption on Revenue	Impact on Program	Opportunity for Philanthropy
Tuition	Remote classes, declining enrollment.	Organization instability, budget gaps, etc.	
Admission/Membership	Facilities closed.	Stability, long-term viability, reopening?	
Events	Social distancing.	Lack of revenue, support for other programs.	
Fee for service	Closed facilities or altered services.	Gaps in budget, loss of momentum for projects.	
Government Funding	Financial uncertainty.	Funding gaps.	

Revenue Options



What is your cost to raise a dollar?

What is your ability to increase the ROI?

What if you had more resources?

Planning for the Year(s) Ahead

Realign your Fundraising Goals with Those Most Able to Impact the Mission



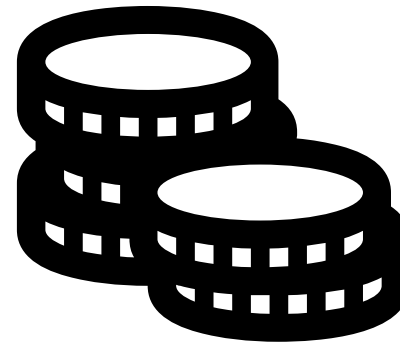
Changing Environment

Re-Evaluating Your Case

- How important did the community think academic medicine was a month ago?
- Enjoying a concert in person may be more important than people thought it was?
- Educational experiences in the classroom have a newfound value for many families?
- Critical needs for families seemed like something the government had handled?

Focus on Ensuring ROI

- Increase the transparency of your program throughout the organization.
- Redistribute resources to those programs that will impact bottom line goals.
- Minimize historic inefficiencies.
- Evaluate the staffing structure.
 - Open positions.
 - New or outdated positions.
- Not all gifts are equal.



Reorder Prospects

- Your pipeline may be scrambled.
- Americans can be skeptical of crisis-based fundraising.
- Your best friends will support some core operating expenses during these times.
- New prospects are available to you.
- Donor-advised funds create a unique opportunity.

American billionaires have gotten \$280 billion richer since the start of the COVID-19 pandemic
Their net worth is rising at a time when millions and millions of people are finding themselves out of work.

Open Society Details Plans for \$130 Million in Coronavirus Spending

Early Recovery: Learnings from the Past

- Some constituents are doing well despite everything.
- Some examples of generous corporate giving now.
- High-level donors will shift to other priorities sooner than the base.
- Foundations often lag, but some examples of unrestricted portions are expanding.

Plan Communication Differently for the Future

- The tone of your communications will have to be different during this disruption.
- Key messaging will have to be consistent with your long-term relationship plans for prospects.
- Explaining the role of philanthropy will have phases and likely increase in complexity—don't make your situation more challenging—have a plan.

Create Efficiencies

- For many, budget cuts will be a reality.
 - Outsource select tasks.
- Focus efforts on the entire pipeline.
 - Different donors will activate at various phases during the recovery.
- Managing data will be more important than ever before.
 - Constituents will be intolerant of poor “reach outs.”
- Realigning staffing will be essential to produce the right outcomes.

Takeaways for planning

1. Evaluate the impact of every revenue program.
2. De-emphasize programs that will have less immediate impact.
3. Listen to your teammates concerns.
4. Pivot to the greatest opportunities.
5. Champion your program as a solution to the problem.



Questions?

Additional Resources Found At:

[Bwf.com/CurrentResources](https://www.bwf.com/CurrentResources)