



BWF Client Partner Series

Mark Marshall and Josh Birkholz



- 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 Webinars



All webinars are at 2pm EST/1pm CST.

- Thursday, April 2: ***Understanding Your Engagement Index: Priming Your Organization for Current and Future State***, hosted by Alex Oftelie.

Reviewing Philanthropic Priorities and Alignment with the Current Marketplace

Mark Marshall and Josh Birkholz



Agenda

1. Working with Donors to Establish Priorities
2. Shifting Priorities by Marketplace Recovery Stages
3. Questions

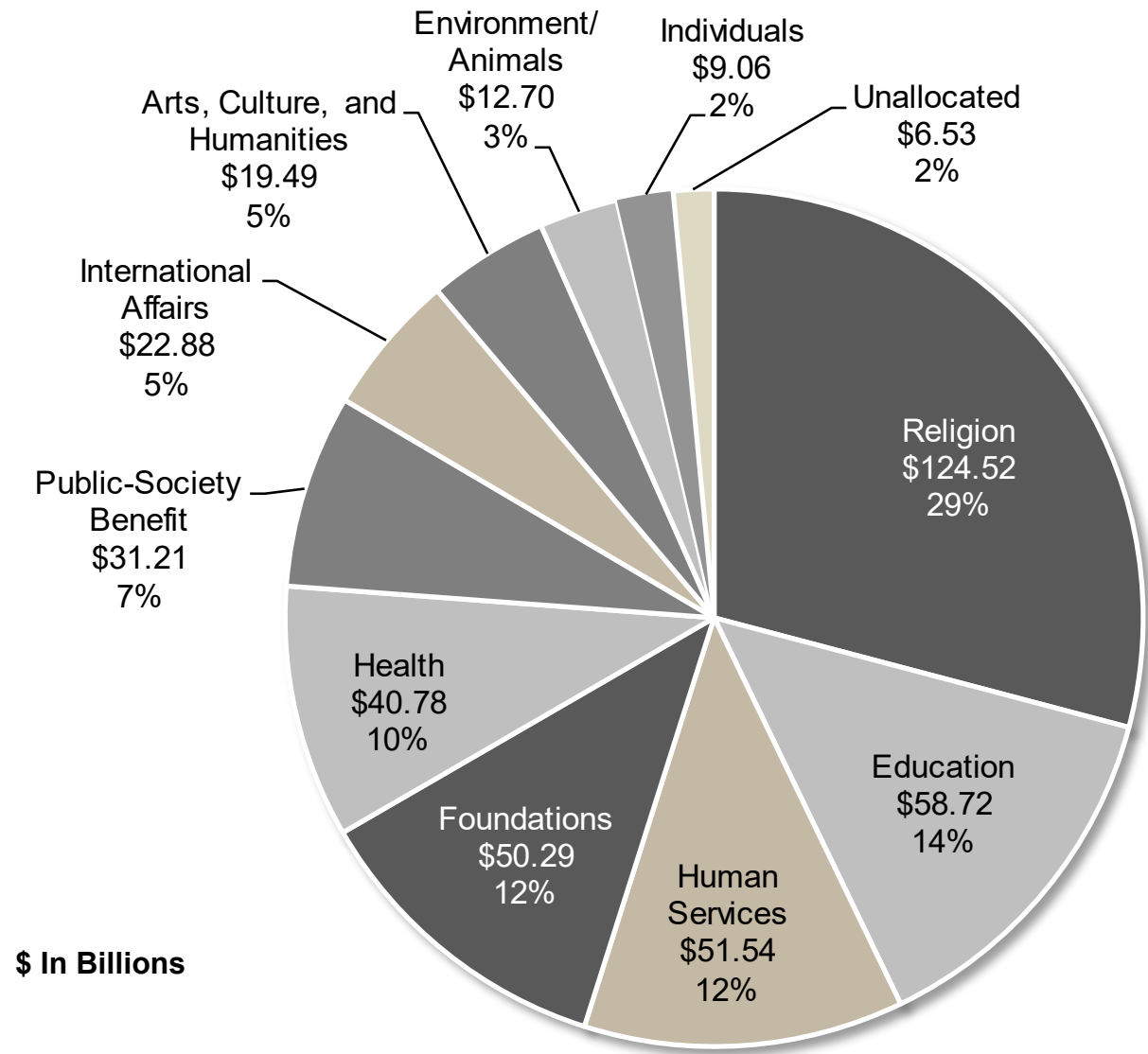
Reminder: Key Lessons Learned from Previous Events

- **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.



Working with Donors to Establish Priorities

These sectors equal more than just broad categories of dollars—they are someone's most important priority.



\$ In Billions

Source: Giving USA

Where are your philanthropic priorities currently aligned?



What is the impact of our priority?

- **What will *or* will not happen in the world?**



- **Is our ability to fulfill our mission impacted by this project?**

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?

Establishing Refined Priorities

- Listen.
- Be clear about the role of philanthropy at your organization.
- Tone matters.
- Shift the order of urgency for the organization, BUT not the donor.
- Maintain focus.



Shifting Priorities by Marketplace Recovery Stages

Short-Term Focus

- Urgent needs.
- Opportunities to help.
- Recipient benefit.
- Situational solutions.



Gratitude

- How past gifts have prepared us for this situation (e.g., endowment).
- For donors continuing to give.
- For constituents who normally give, but maybe can't right now.

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 expanding.

Champions



Who will jump first?



**Identify champions to
be leaders as donors
and volunteers.**

Recovery gifts

Volunteer reach-outs

Matching gift opportunities

Solicitations

- Expect slowing in multi-year commitments. Try not to lead preferences.
- Show pledge flexibility, even cash equivalents now.
- Contingency/conditional pledges.
- Flexible time periods.
- Multi-asset construction.
- Be careful with bequest messaging.

Long Term Recovery: Rainy-Day Funds

- Establish business continuity plans for future black swan events.
- Consider specific continuity-based funds.
- Reframe importance of endowment and unrestricted commitments for future scenarios.



Lasting Effects



- Class of 2020 alumni will have different nostalgia experience.
- Influx of grateful patients.
- Human services needs may be lasting.
- Global poverty efforts may backslide.
- Potential for arts consolidation.
- Potential for religious organization consolidation.

Celebration

- Find ways to “close the chapter.”
- Recovery events.
- Retrospective publication.
- Employee thank you gifts.





Questions?

Additional Resources Found At:

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

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