

The Big Rethink

Fundraising in the era of COVID-19

A GUIDE FOR CHARITIES IN CANADA





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FOREWORD

Unprecedented. Uncharted. Uncertain.

Just a few words being used to describe the times we are navigating as we deal with the COVID-19 pandemic and its fallout. And, given the degree of uncertainty we continue to face, it's hard to know exactly what this will mean for Canadian charities and their fundraising.

So, what can we say for certain?

There is no denying that our sector faces challenging times ahead. A survey¹ of 1,458 charities undertaken by Imagine Canada in May showed that the pandemic is having a significant impact on the financial health of organizations; a size and scope we have never seen before. Survey respondents reported an average decrease in revenues of 30%.

But as is the case in any challenging time, there is also opportunity. Probably one of the most significant is that the pandemic has given our sector a 'demonstration of relevance' opportunity that is second to none. This situation illustrated how critical charities are to Canadians' health and well-being. It has demonstrated the importance of having a strong social safety net, whether in healthcare,

education, or social services. And, as communities continue to emerge from lockdown, we also believe Canadians will be reminded how much we need the other 'essential' elements of our lives... that are filled by sports, recreation, religion and culture.

We believe there is one other thing that can be said with certainty – Canadians are a generous lot. Think back to the response to the Fort McMurray fires. Or the Humboldt bus crash. Or how giving rebounded after the great recession of 2008/09. Canadians have always been generous... and we don't expect that will change now. In fact, if the response we have observed over the past several months is any indication, that generosity may actually grow.

I'll end with one final, optimistic note. And that is to not forget what came after the 1918/19 Spanish flu pandemic...

The 'Roaring Twenties' as they were known. A time of significant economic growth, technological progress, widespread prosperity, and social, artistic, and cultural dynamism.

So better days are undoubtedly ahead. But exactly when those days arrive and what they will look like for our sector depends greatly on what we do now.



NICOLE NAKONESHNY
Partner / Lead, Knowledge + Insights

[1 Imagine Canada's Sector Monitor Charities & the COVID-19 Pandemic](#)

INTRODUCTION

Organizations must be purposeful in planning how they will recover and set themselves on a path for future growth. And so, as the dust settles and we continue to emerge from this period of the pandemic, it will be imperative for boards and senior management to lead their organizations through visioning and planning exercises.

In this report, we have endeavoured to create a ‘one-stop shop’ to be used over the next number of months to guide your planning activities. We have compiled our best thinking related to how the pandemic will affect fundraising and philanthropy and identified specific elements that organizations should be examining. We have also provided some advice and guidance about areas beyond fundraising that organizations need to unpack and explore to ensure growth. And finally, there are links to a variety of other resources that you may find helpful as you undertake your thinking and conversations over the next several months.

Three bits of overarching guidance:

FIRST, not planning is not an option. No matter how you have or have not been affected by the pandemic, your organization cannot assume that the way you used to do things will continue to work in the future. Given that every organization’s recovery will be slightly different, your plan and ultimate response also must not be boilerplate. And, don’t think of planning as a ‘one and done’ exercise. Set up mechanisms, including board and staff task forces or committees, that will enable you to review and revisit your strategic decisions on an ongoing basis for the next year or so.

SECOND, nurture a ‘culture of inquiry’ and involve your volunteer leadership and donors. This is a time to plan with an open mind, and to re-engage key stakeholders in your mission to hear what they think and what they want. Involve them via surveys, conversations, and focus groups. As co-creators of your path forward, they will give you more of themselves, and that can only strengthen your organization.

FINALLY, don't pause too long...or worse yet, stop altogether. We know from previous experience with downturns that those who continued to drive ahead and maintain some degree of momentum emerged much more successfully, while those that dialed things back found they had lost significant ground. So, whether a new initiative, a planned campaign or ongoing fundraising, be thoughtful about how you will move forward, but be sure you are maintaining some forward momentum in the organization.

Acknowledgements

The content in this report has been informed in part through our work and conversation with clients over the past several months, and we thank them for their fellowship in thinking through some of the challenges they have been facing. Tackling these real-time, 'on the ground' problems has been invaluable in shaping the advice and guidance we are pleased to share in these pages.

We also conducted formal conversations with various sector leaders and fundraisers over the past several months to inform our thinking. We are most grateful for the generosity they showed in sharing their thoughts, input, and guidance. The following is a list of the individuals who participated in these formal conversations and whose input and insights also helped shape the content of this report.

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Services, Scotia Wealth Management

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Calgary Foundation

Rick Frost
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Ted Garrard,
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Right to Play

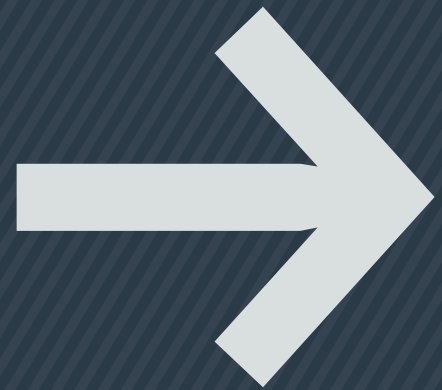
Lili-Anna Pereša
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Jayne Watson, President and CEO,
National Arts Centre Foundation

Fundraising Program Rethink – Six Areas for Exploration



1 Your Case: Responding to Shifting Donor Interest

The pandemic has required most, if not all, organizations to pivot and refine their case for support to respond to a new reality.

Going forward, this reshaping will need to continue. Whether because of a change in organizational strategy, or simply to make the strongest case possible in the context of emerging from the pandemic, **organizations will need to meaningfully focus on their case for the next year.** That could mean anything from undertaking a full fundraising priority setting exercise, or simply refining and adjusting elements and messages.

“

I'm curious if this crisis has given the case for infrastructure support a boost. Donors don't want to give to organizations that won't weather this. Historically, moving into a surplus position deters funders from contributing; but a surplus would have provided stability in this scenario we're in. Maybe going forward, donors will be willing to invest in financial infrastructure and financial wellbeing of charities they support.”

Bruce MacDonald, President and CEO, Imagine Canada

As you think about your case, consider the following trends and observations that will shape donor interests over the next months and possibly years:

- We are observing some **shifting in philanthropic priorities** as many donors seek to understand the implications of COVID-19 and find organizations that are responding in a way that resonates with them. The areas of greatest interest at the moment relate to **‘supporting basic needs’ and ‘facilitating recovery’**.
- As with many areas of life, **Canadians’ focus has shifted to ‘local’**. Whether it be where goods are manufactured, the businesses they wish to support, or where they will take their vacations, there will be a trend, at least for a period of time, towards focusing on our own local communities. This orientation will undoubtedly factor into giving decisions as well.
- However, there does continue to be an openness, particularly on the part of long-time supporters, to engage in conversation about what the pandemic means for particular organizations even if they are not ‘on the front lines’, and a **willingness to hear the case for how this crisis is affecting the organization**.
- A silver lining to this crisis may be the **opportunity to build a stronger case for operating support**. The pandemic has increased awareness of the need for infrastructure and unrestricted support of charities and donors may have greater openness to supporting a case for creating strong and healthy operations than they have in the past.
- **Organizational values are even more important than organizational mission and vision** in decision making right now. Donors are watching to see how organizations are responding. They are looking through a values lens and are often motivated by the values being exhibited by the organization and its leadership during this crisis.

KEEP IN M!ND: Scenario Planning

In times of significant uncertainty, scenario planning helps leaders navigate and provides a useful structure to make key decisions.

In the context of COVID-19, scenario planning has become more important than ever. The pandemic has introduced an unprecedented level of uncertainty and disruption. As such, engaging in iterative scenario planning exercises is a critical factor for success.

To help organizations do that, we have created a three-step scenario planning process that involves developing and planning for several scenarios. You can find more information on this process here.

[Scenario Planning – 2020 – Maintaining Momentum Series Bulletin](#)

RESOURCE LINKS

[The Case Issue – Trends 2014: Issue 1](#)

[Making Your Case – 2020 – Maintaining Momentum Series Bulletin](#)

“

More than one donor or prospect has told me they feel they have a responsibility to give since they are fortunate enough to have a job and income. We should be talking about how each of our organizations are helping, and how through us they can make a difference.”

Michael Kiefer, Senior Philanthropic Advisor,
Presidential Initiatives and Principal Gifts, Dartmouth College

History Tells Us

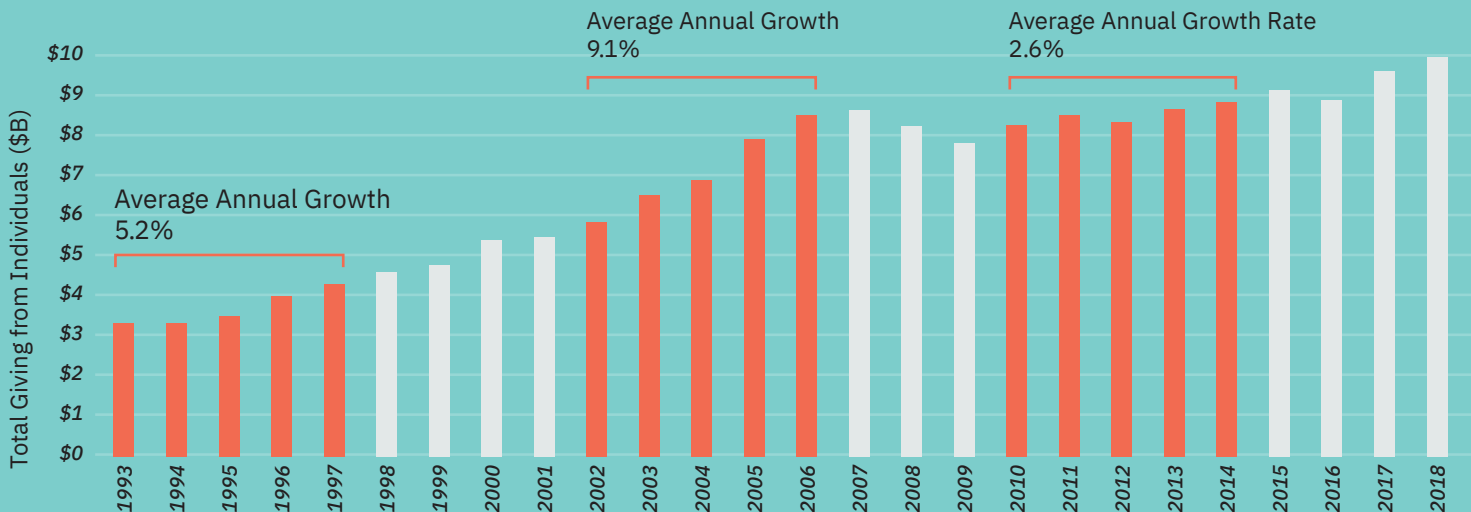
The concept that the ‘world is different this time’ is often cited during times of change and upheaval. But history shows that is rarely the case. We have come through wars, pandemics, natural disasters... and life goes on, the economy continues to grow. The same is true when it comes to philanthropy.

As we consider the future and what this means for giving in Canada, it is instructive to back at how giving by Canadians changed as we emerged from past challenging economic times. And the data is reassuring.

- After the recession of the early 90s, giving grew by an average of 5.2% annually.
- After 9/11, giving grew by an average of 9.1% annually.
- And after the 2008/29 recession, giving grew by an average of 2.6% annually.

So, a valuable perspective worth remembering in times like this is that while the short term tends to be volatile and unpredictable, long term outcomes are quite predictable.

CHARITABLE DONATIONS CLAIMED BY CANADIAN INDIVIDUAL TAXFILERS (\$B)



2 Individual Donors: Deepening Relationships

Individual giving has long been the primary and most resilient driver of philanthropic revenue for charities. That is not expected to change.

What may change, however, is how organizations tap into giving from individuals. Those that have relied on transactional, event-based fundraising will likely be challenged for some time given the psychological fallout from social distancing measures. What may also change is who has the capacity to give as we continue to deal with the economic consequences of the pandemic, including high unemployment.

As such, charities must focus resources and attention on individual giving programs that **build personal, ever-deepening relationships, particularly with donors who have greater giving capacity.**

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Individuals will be more resilient than corporations as donors. The financial crisis of 2008 affected jobs and portfolio values but individual giving remained strong. I’m seeing that many donors are interested in increasing their giving. They are making an effort to understand the situation and find organizations that are responding in ways that resonate with them.”

Malcom Burrows, Head, Philanthropic Advisory Services, Scotia Wealth Management

KEEP IN M!ND: Targeted Acquisition and Strategies

It would be naïve not to acknowledge that some Canadians will be struggling financially given the economic hit they will have taken during the pandemic, and by what is expected to be a continued high unemployment rate for the foreseeable future.

While charities must not cease their acquisition strategies, the smart thing to do will be to take a more intentional approach in identifying the correct target segments for acquisition efforts rooted in analysis of your databases and communities.

It will be critical, as well, to create targeted cultivation and solicitation strategies for particular segments of donors rather than taking a broad-brush approach. Create specific strategies and programs for different donor groups – e.g. women, millennials, seniors.

As you think about individual donor giving programs, consider the following trends and observations:

- **Major donors are still exhibiting great willingness to engage** in conversation, and the observed reaction is different from past economic crises like the 2008/09 recession. The nature of this crisis is generating significant response from philanthropists who see the critical role that philanthropy must play in dealing with it.
- There has been an **increased interest in setting up endowments and revising estates** among those who engage with philanthropists in these types of conversations, (e.g. Donor Advised Fund sponsors, Community Foundations), and a general trend of more people **wanting to organize their legacy giving plans**.
- From a tactics point of view, individual giving trends specifically point to **creating and implementing major, mid-level, monthly and planned giving capacity within the organization**. Pledge based giving, like major and monthly giving, tend to be the most resilient philanthropic revenue sources.
- Don't forget **about donor loyalty**. Many organizations have had an influx of gifts from new and lapsed donors thanks to their COVID-19 fundraising activities. Be smart about segmenting this group of first-time donors and **converting them to regular, ongoing contributors through good engagement and stewardship**.
- Speaking of stewardship, it is an absolute must to be able to develop long-term, meaningful relationships with donors. So, **resist any urge to cut stewardship programs**. Note that stewardship is another area where social distancing will have an impact as activities like events, tours, and field trips likely won't be able to happen for a while. Organizations will need to find other creative and safe ways for donors to see and feel the impact of their support.

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Individuals are the primary driver of philanthropy. This will move us to be stronger at donor management and stewardship, keeping them close. We must communicate regularly how we as organizations are changing. We can't just change programming then tell donors after – they should be involved in that journey.”

Susan McIsaac, Global Philanthropy Officer, Right to Play

RESOURCE LINKS

[The Target Marketing Issue – Trends 2014: Issue 3](#)

[Unlocking the Potential in Women's Philanthropy – The Ask podcast: Episode 6](#)

3 Digital: Growing (Or Creating) Digital Capacity

Given the challenges that social distancing has created for charities, particularly those highly reliant on fundraising events, looking at your digital capacity to ensure it is adequate likely feels obvious.

Organizations with existing digital capacity and facility were able to respond much more quickly to the changes required when social distancing measures were enacted. But, even if the pandemic were to end tomorrow and we were able to connect in person, **investing in digital capacity is still an absolute necessity**. When it comes to the need to be able to raise money and connect with donors online, there is no going back.

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If there’s only one thing you can do, invest in technology. Yes, you need a robust platform, but you also need staff with the right skills and expertise. And you need relevant, quality content in the right format, at the right time, to the right person. So, an agile digital marketing strategy is required as well.”

Lili-Anna Pereša, President and Executive Director, Centraide of Greater Montreal

KEEP IN M!ND: Creating a Culture of Innovation

Now more than ever, organizations are going to need to be innovative in order to adapt and adjust to their 'new normal'.

But innovation is a term that tends to be bandied about somewhat haphazardly without a good understanding of what it is and how it comes about. And it's easier said than done.

Organizations must be certain that they have in place what is needed to be able to innovate in their practices. Among other elements, keys include time, patience, investment, curiosity, tolerance for risk... and a permission to fail. A few years ago, we did an in-depth exploration of what's required for charities to be innovative in their fundraising programs and you can find that article here.

[The Innovation Issue – Trends 2016: issue 2](#)

As you think about growing your digital capacity, consider the following trends and observations:

- To make decisions about how to approach your digital strategy, **three distinct filters to think through are:**
 - **Engagement** – Improving the donor experience by migrating engagement onto digital platforms
 - **Fundraising** – Facilitating fundraising by creating / migrating fundraising programs onto digital platforms
 - **Decision making** – Making better decisions across the enterprise by leveraging data
- Digital capacity involves creating an **entire digital landscape** that includes your website, social platforms, e-mail outreach, search engine optimization, content creation, digital marketing, response mechanisms, and data tracking and integration.
- It can and does, however, include creating **online campaigns and initiatives**. This can involve migrating current programs (appeals, events) to an online format. Or it can involve creating a special online campaign like a giving day or participating in one or the national days of giving (e.g. Giving Tuesday).
- In addition to digital strategy, your **organizational capacity** to develop, support, and execute your strategy must be in place. Capacity means a variety of things including:
 - Knowledge, skills and technical capabilities of staff
 - Infrastructure, such as systems, databases, website, and platforms
 - A means to monitor and assess, such as analytics and reporting tools
- Without good data, it's impossible to 'go digital', so **getting your data house in order** is a critical concurrent, or even first step in your efforts to become digitally competent. Good data practices are a fundamental underpinning to executing a digital fundraising strategy.

Getting Your Data House In Order

KCI created the following Data Platform to be used as a guide when thinking about how to assess your data capacity and ensure it is as robust as possible.

YOUR DATA PLATFORM

TIER 4 ANALYTICS & ADVANCED TOOLS	If the elements from Tiers 1-3 are in place, are you harnessing your data to understand your donors? And predict future trends and support? Approaches and tools at this level are tailored based on the question to be answered, and output quality depends on data quality.
TIER 3 METRICS & REPORTING	Do you have solid reporting about your key metrics? Can you monitor donor retention, acquisition, renewal, etc. by channel and program? Do you know who your best and most engaged multi-channel supporters are?
TIER 2 INTEGRATION & DATA STRUCTURE	Is data from various sources (P2P platforms, communications, events, etc.) integrating with your primary database – in a timely way? Does your data structure support basic and advanced reporting?
TIER 1 DATA CAPTURE & CODING	What data do you need? Are you capturing it effectively? Efficiently? Does coding support directional analysis?

“

One of the most common requests over the past few months at the Calgary Foundation has been for grants that help organizations to become technologically savvy and enable them to do remote work and provide virtual delivery of service. For many that didn't just involve the necessary equipment, but also support to create the skills for staff to use the technology and deliver services in this way”

Eva Friesen, President & CEO, Calgary Foundation

RESOURCE LINKS

[Going Digital – Trends 2018: Issue 2](#)

[Going Digital – The Ask podcast: Episode 9](#)

4 Fundraising Programs: Ensuring Diversity and a 21st Century Mix

An **assessment of your fundraising program mix is an imperative** to identify where there is ongoing strength and relevance, where investments and innovation are required, and where sunsetting of activities is necessary.

First, given the disruption to our ability to raise money in person, you will want to ensure you either create or adapt programs that, at least in the short term, can be executed from a distance. For the longer term, you will want to create a degree of diversification to be certain you aren't overly reliant on one revenue stream. And finally, you will want to be sure that your program mix is appropriate to raise money in today's predominantly digital environment.

“

Boards will become more activist to ensure organizations are not caught unprepared if something like this happens again. Boards will be more worried about business continuity plans, and donors will want to see this too. They won't want to invest in charities where risk is associated with the gift they're giving. Stability and strength will be more important in making case.”

Ted Garrard, CEO, SickKids Foundation

As you think about the right mix for you, consider the following:

- A good mix of fundraising programs should include ones focused on **acquiring new donors**, ones focused on **renewing gifts from donors**, and ones focused on encouraging groups of high potential donors to **grow their giving**.
- As already noted, digital and online programs must be a part of your mix, but it's important **not to fully abandon offline channels**, including direct mail programs. Some donors continue to prefer to give via offline channels and for a period of time, it is important to have a multi-channel mix.
- Given the challenges to event fundraising, now is a crucial time to **examine all events in your portfolio**. Determine which you wish to keep for the long term, which you can migrate to a virtual format, and which you should be dropping to invest elsewhere. In doing that review, don't just consider through a financial lens. Rather, examine from all perspectives, including the event's utility in engaging, cultivating, and stewarding donors, and determine how you replace those activities before deciding to drop it.

KEEP IN M!ND: Diversity and Inclusion

This critical element to a charity's future ran the risk of being lost in the madness of the pandemic, but it is again being underscored and brought into our collective consciousness by the recent protests in the United States and around the world.

It is imperative for charities to pay attention to ensuring that diverse communities feel a part of their organizations. This extends to board membership, how you market yourself and tell your stories, whether you can speak to diverse communities in-language, the make up of your staff, and whether you are engaging all communities (e.g. LGBTQIA+, different ethnic communities, people with disabilities, etc.).

If this is not a focus area for your organization, you run the risk of appearing tone deaf and out of step with the times, which will limit your ability to grow and be seen as relevant.

Most importantly, you will miss the richness of perspectives and insights that a commitment to inclusivity and diversity brings to your organization.

- Ensure your mix includes **monthly, mid level, major, and planned giving capacity**. Given the demographics in Canada, planned giving is a wise investment and area of focus for charities, and it can be a very resilient form of revenue. In addition, pledge-based giving, like major and monthly giving, are also resilient revenue sources. In general, charities have not reported a significant decline in pledge and monthly giving during the pandemic.
- **Stewardship must be a part of your fundraising mix** as the resilience of programs like planned, major, and monthly gifts can only be realized if stewardship is done well and consistently. If donors feel the organization is taking them for granted or not communicating well with them, there is a risk of bequests being revoked and pledges not being fulfilled.
- Integration between the relationship-focused areas of fundraising, **notably major and planned giving, is becoming more and more common**. Many organizations are ensuring that fundraisers who engage with donors and prospects on a personal level are comfortable with all types of giving. They are also talking to donors about ‘blended’ gifts that include both present and future commitments much more often than ever before.

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Long held and sacred beliefs and practices in organizations can often get in the way of innovation and creativity. The pandemic has changed that. Things that we had been trying to do for years have, out of necessity, literally happened overnight. There won't be any going back after this.”

Wendy McDowall, Chief Development Officer, YMCA Greater Toronto

**RESOURCE
LINKS**

[The People Side of Fundraising. Trends Article: February, 2020](#)

[Maximizing the Middle – The Ask Podcast Episode 8](#)

5 Corporate Partnerships: Safeguarding Your Relevance

The trend of companies getting into the ‘doing good’ business has been around for a few years, and it is expected that the pandemic will only intensify this practice in the future.

Throughout the pandemic, companies around the world have made significant shifts for the good of their employees, their customers, and society. More than ever, people have been paying close attention to how companies are responding to community needs in this time of crisis. It is anticipated that this consumer expectation will continue and, as a result, even more businesses will be reflecting on what they are doing for the ‘greater good’. The **key opportunity for charities in this trend is that business will be looking for ‘purpose solutions’** – and purpose is something we have in spades.

“**Companies are clear that their giving is tied to their enterprise (their employees and customers) and I suspect this will move community higher up on list of criteria. There is always a balance point with corporations between shareholder happiness, employee/corporate well being, and community satisfaction. The equation between these three things will change.”**

Barbara Grantham, President and CEO, CARE Canada

KEEP IN M!ND: Mergers and Collaboration

Given the degree of financial pressures charities are facing, many will be exploring if a partnership of some sort is the right way forward. As a result, we are anticipating there will be significant merging and consolidation over the coming months and years. Discussions are already underway among several organizations.

There is also anticipation that there may be greater collaboration between organizations in general as well as between the three sectors – public, private and non-profit. Not only will this have an implication on how your mission is executed, be prepared that donors are going to be looking and expecting a greater degree of collaboration between organizations and sectors.

As you reflect on your corporate partnership potential, consider the following trends and observations:

- Corporate Canada stepped up in a very meaningful way by providing philanthropic support during the pandemic. According to our calculations, as of June 2020, corporations have made over **\$100 million in gifts to pandemic relief and recovery** in Canada.
- Companies view their **social contributions as brand differentiators** and are seeing the need to not only deliver financial performance, but also show how they make a positive contribution to society. The key to building partnerships with companies will be to demonstrate how a charitable organization can help to advance their corporate strategy and brand.
- Companies are increasingly integrating their ‘purpose’ activities into their overall business models. In other words, they’re not just earmarking funds for charitable donations, but **exploring how their teams, products, and core competencies can address key needs in the community**.
- The challenge for charities seeking to tap into this trend will be to **create customized partnership opportunities** that incorporate companies’ business models and involve their customers and employees. This will not simply be about ‘writing a cheque’ to charities.
- It is important to anticipate that, like other parts of their business, **companies will likely undertake a review of their community investment strategies**. As a result, giving priorities and existing relationships with charities may shift and change.

RESOURCE LINKS

[KCI's List of Major Gifts to COVID-19](#)

[Covid Knights: Corporate social purpose in the time of COVID-19](#)

[From Me to We: The Rise of the Purpose Led Brand – Accenture](#)

[How 2020 is Ushering In A New Era for Corporate Social Responsibility – Forbes](#)

6 Campaigns: Updating Strategy... and Creating a Reason

As we emerge from the pandemic, **campaigns will be an important fundraising tool for charities.**

Whether multi-year and multi-faceted or short-term and singularly focused, campaigns will continue to be an effective way for charities to break through the noise and clutter of donors' day to day lives and bring attention to your cause and case. Campaigns establish a reason to be worthy of attention. They create a sense of excitement, momentum, and urgency. And they raise profile and amplify voice.

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#CanadaPerforms, an emergency relief fund for Canadian artists, worked as a fundraising initiative during the early days of the pandemic even though it was not tied to the public health crisis; it worked because it was authentic to the mission of the National Arts Centre and was providing support to individuals (in this case, artists) whose livelihoods had been upended by the crisis.”

Jayne Watson, President & CEO,
National Arts Centre Foundation

KEEP IN M!ND: Fundraising Volunteers

Volunteers are still critical to our work and will likely grow in importance in the coming years as charities seek to grow and stabilize their fundraising revenues.

The professionalization of the sector had started to shift focus away from volunteers. But even before the pandemic, it was time for the pendulum to swing back. In what will be a challenging fundraising environment, volunteer leaders who give at levels commensurate with their financial ability, then fearlessly and unapologetically ask others to follow their example, will be fundamental to success.

Volunteers are key to opening doors, introducing us to prospective donors, and influencing giving. And volunteers may become more crucial to acquisition and solicitation efforts at all levels of giving to help scale your efforts and facilitate introductions to new donors. Don't make volunteers an afterthought, but rather integrate the development of a robust volunteer strategy a part of your planning process.

As you reflect on whether a campaign is a good strategy to implement, consider the following trends and observations around campaign fundraising.

- If you are currently in campaign, undertake a **fulsome campaign review and assessment**. You will want to determine if you should pivot any element of your strategy, including your case, your volunteer structure, your messaging, your timeline etc.
- If you think a campaign may be a good strategy to consider, note that campaigns cannot just be 'switched on' and **need preparation and planning**. To be successful, put together your case for support, mobilize a small team of volunteers, identify a group of prospects, and get your messaging and communications materials organized.
- Consider a campaign as a means to **advance goals in addition to financial**. These can include brand building and raising the profile of the organization, advancing the culture of philanthropy, or growing the involvement of the community of stakeholders.
- **Volunteers are critical to campaigns**. Leaders who will open new networks and nurture new relationships with key philanthropists and corporate partners are essential to help organizations attract gifts and mobilize philanthropy. Their voices as champions of the case for support also bring important credibility.

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Saint Mary's University is incredibly committed to the vision of the campaign as a driving force for the future. The area that we are looking closely at is the case for support to ensure that the framing within the case is relevant and acknowledge the realities of a global pandemic.”

Erin Sargeant Greenwood, Vice -President, Advancement,
Saint Mary's University

RESOURCE
LINKS

[KCI's Campaign Trends Report](#)

Big Picture Rethink: Going Beyond Fundraising

Planning for future fundraising success goes beyond the function of fundraising itself and must include **a holistic rethinking and examination of your organization – your value, your capacity, and your culture.**

Value

At this time of profound change and upheaval, organizations should undertake robust and courageous examinations of what they exist to do. Which shifts resulting from the pandemic will materially impact the value you provide to your stakeholders and the context in which you operate? How will you execute your charitable purpose in a world where social distancing is the norm? Where travel may be restricted? What are the risks and opportunities associated with these and other trends over the short, medium and long terms? What is the resilience of your strategy when taking these shifts into consideration?

Answering these questions means stepping back and taking a critical look at your purpose and the fundamentals of how you are set up and operate. This work involves poking holes and pushing back on assumptions about your mission, who you are, and how you work.

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I’ve been hearing charities say to me: ‘if you can get this government money for us, we can keep doing our work’. What some have meant, though, is they can keep doing work the way they used to. We need to instil that this is a new frontier, not a reset of the past. Organizations will enter a recovery period. For the next 1-2 years, it’s unlikely the world will look like it used to. To continue to try and get back to the old normal is naïve. It must be about planning for a new frontier, and this is a fundamental change. We must let go of the past.”

Bruce MacDonald, President and CEO,
Imagine Canada

“

This pandemic has given charities the chance to step forward in a way that governments could never do. There is perhaps an opportunity here; the relevance of our sector has never been in the spotlight more than now.”

Rick Frost, CEO, Winnipeg Foundation

Capacity

As vision and strategies are reimagined and rebuilt, it will also be necessary for organizations to get serious about assessing and filling gaps in their capacity to execute. When thinking of your capacity, be sure to include the following: people, skills, knowledge, structure, infrastructure... and any other physical or intellectual resources necessary to implement your strategy. There will undoubtedly be a need to augment, upgrade, and reskill.

One often overlooked area of capacity is board governance practices and operations. We know that strong board governance and excellent board management relations are critical to organizational strength and resilience. As a result, this element should be included in an exploration of organizational capacity.

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The greatest impediment to change is the gravitational pull of the status quo. We think we want to change and evolve until it gets scary. But overnight, everything changed. Before this crisis we were asking ourselves “how can we change this?” Now, the question is “how can we sustain and leverage these changes?” This is a chance to leave behind bad habits such as operating in silo.”

Ken Mayhew, President and CEO,
William Osler Health System Foundation

Culture

A critical element to consider when thinking of the changes you'll need to make to ensure future fundraising success is your organizational culture. It, unfortunately, is probably also one that is far too easily overlooked.

The environment we are navigating requires a highly nimble and agile organizational culture. This is required to succeed in any challenging environment, particularly one that is so uncertain and changing so rapidly. And organizational adaptability and agility are primarily driven by the ability of your employees to adapt. Agile organizational cultures are ones that are characterized as having a high tolerance for ambiguity, entrepreneurial drive, empowered teams and employees, and rapid learning and decision-making cycles. It's important to note that agility is not something you 'do', but rather it is something you become over time.

There are very few organizations for which some degree of culture shift will not be required. So, be sure to include it as one of the elements to be explored as part of your overall organizational rethink, assessing where you have strengths and where there are gaps requiring remediation.

RESOURCE LINKS

[Collaboration: Stronger Together – The Ask podcast: Episode 24](#)

[Fundraising and the Economy – Trends 2016: Issue 1](#)

[Change and Adaptation – Trends 2015: Issue 2](#)

Looking Forward

While it's hard to say with certainty who will best weather this storm, we have a few observations about the **organizations that have shown the greatest resiliency as they have navigated this crisis so far.**

Use these characteristics to inform how you can best fortify the resilience of your organization to be ready for the next inevitable shakeup:

- Those that have deep relationships with their individual donors
- Those that have diversified revenue streams
- Those that have strong board / management relationships and strong board governance
- Those that have an ability to be nimble and adapt quickly (mindset, skill, culture, attitude)
- Those that have existing digital capacity
- Those that have pledge based and monthly revenue streams
- Those that have adjusted their case to be relevant given the situation

And while recognizing that every organization's particular situation will dictate where they need to focus and what they need to do going forward, **the checklist to the right is a summary of the areas that every organization should be exploring** over the next weeks and months as part of their own 'Big Rethink'.

BIG RETHINK CHECKLIST

- ✓ Revisit organizational strategy
- ✓ Redefine fundraising case
- ✓ Grow relationships with individual donors
- ✓ Invest in digital capacity
- ✓ Explore corporate partnership potential
- ✓ Diversify fundraising program mix
- ✓ Update campaign strategy
- ✓ Assess organizational capacity (skills, structure, infrastructure)
- ✓ Review and strengthen board governance
- ✓ Create a diverse and inclusive organization
- ✓ Shift organizational culture (mindset, attitudes, behaviours)

How We Can Help

Managing the challenges and disruptive changes outlined in this report will require focus and agility, critical thinking – and strong project management.

To help you move forward, KCI's team of consultants across the country can help.

Here are five ways that we are supporting organizations during the crisis and recovery, in addition to our ongoing suite of services. To learn more, or to discuss further, connect with us at info@kciphilanthropy.com or visit our website at kciphilanthropy.com, and kcitalent.com.

1 Scenario Analysis and Operational Planning

Not planning is not an option. But carving out the time and energy to engage in an inclusive, strategic and data-centred process is challenging at the best of times. KCI can work with you to engage key stakeholders including your Board, analyze your current reality, identify risks, and create space for your team to do the strategic work required. Our experience, independent perspective and strong peripheral vision can help you make sure your plan is robust, adaptive and focused on current and emerging areas of opportunity.

2 Developing Capacity for Relationship-Based Fundraising

Shifting your fundraising programs to build and steward long-term relationships with individual donors is essential given our current environment, but not always straightforward, particularly for organizations whose historic strength has been in transactional and event-based fundraising methods. KCI has deep expertise in donor-centred fundraising, including monthly, mid-level and major gifts programs. We can help you develop your capacity to undertake this type of fundraising by refining your case and value proposition, strengthening your programs, growing your pipeline, training staff, and implementing leading metrics to track and build on your progress.

3 Organizational Redesign & Transition Supports

As the ways we engage supporters and generate revenue are undergoing rapid change, it's critical to ensure that your most important resources – your people – align with your overall strategy and plans. KCI can provide external perspective and expertise on how to organize, train, and compensate your team so both they and your organization can achieve their full potential. Specifically, KCI can help you:

- Adapt your structure so it aligns with your strategy and leading industry standards.
- Design and deliver transition and training plans to ensure your people, both staff and volunteer, can take on new roles armed with the tools and skills they need to be successful.
- Ensure you are compensating fairly and equitably, based on function and accountabilities.
- If needed, provide support for finding and hiring adaptable and skilled talent to fill key roles.

4 Closing Gaps

Guiding your organization through a crisis of this magnitude, and the long road to recovery ahead, may require help to ensure key functions are covered during absences, or that additional resources are brought in to help with short-term peaks to avoid overloading your core team. KCI has experienced and skilled fundraising professionals across the country who can provide hands-on help in a variety of ways, from prospect research to interim management to supporting your training of staff and volunteers as they build their own skills in engaging individual donors.

5 Campaign (re) Planning & Execution

Finally, if there is one area that may need a “Big Rethink” as we move through this pandemic, it is any campaigns that were underway or in the planning phase. Timelines, prospect strategies, volunteer strategy, and potentially even your goal(s) will need to be assessed (again), and recalibrated. And once the plan is validated, rebuilding momentum to achieve your goals may need extra help, or an insistent voice to ensure you and your team stay focused. With over 35 years of experience in helping charities plan and execute campaigns though good times and bad, we can help. Whether you're starting out, part-way through, or nearing the end and wondering what your next step should be, we are here to help determine the way forward together.

About KCI

We are Canada's leading consultants to the non-profit sector with professionals across the country in fundraising, strategy, research & analytics, and executive search.

Our core purpose is to inspire and enable organizations to raise money, to make the dream of better communities and improved lives a reality. And through our 35 years of experience, we've helped thousands of organizations craft their strategies, build their teams, and raise billions of dollars in the education, health, social service, arts & culture and religious sectors.

In doing that work, we firmly place our focus on values and people... both ours and yours. We are proudly and resolutely guided by our core values: the highest integrity in all our actions; commitment to excellence and innovation in everything we undertake; openness to new ideas; and collaborative and respectful relationships with our colleagues and our clients. We hire to these values and live them every day.

And because we know the future won't look like the past, we hold capacity building, knowledge sharing and insight creation at our core.

**We have
made it
our business
to know
What's Next.**



KCI

What's Next.

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