

**Making Fundraising Work: A Guide for Small School Development in a Pandemic**

For additional support, reach out to Traci Stratford, tracis@prizmah.org

**Welcome and Introduction**

* We’re hearing schools budgeting for anywhere from 15-30% less fundraising revenue this year.
* <https://prizmah.org/knowledge/resource/fall-2020-scenario-planning-survey-report>
* How are people approaching this: Major donors will step up, lower donors might decline
* Take a realistic look at your individual fundraising. Don;t just make up a number to fill a gap; be realistic; look at your donors and and make a plan

**Remote Relationships**

* Relationships are the key to maintaining and growing your fundraising –in all things. With major donors, funders, your families, the greater community
* Check in regularly; if it has been two month reach out again; go deer from the first tier donors; set a goal of 5 more calls each week and reach out to have others in the school make calls.
* Add personal touches; drop off handmade notes with a coffee pouch;
* Be responsive and transparent; what communications are donors receiving; how are they being included in school activities?
* We’re all going through a **shared trauma**, and when you go through a shared experience, it bonds you together more. So share your trauma and be so transparent in how you’re working to overcome it. Ask for advice, feedback-- show some vulnerability we are *all* struggling, there’s no need to hide it.
* Your board needs to be on board with fundraising! Tip toe time is OVER.
* Your head of school needs to be committed to fundraising.
* Don’t get out of line with donors

**Remote Relationships: Messaging**

* Talk about your quick pivot
	+ Own how proud you are that you got on line so quickly
	+ Own that you’re iterating all the time
	+ Check your messaging; be careful of language
	+ Share what you’ve been doing especially any community outreach you have done; parents and children learning together;
* From Pivot to dollars
	+ Transparency; tracking what will impact the budget; be vulnerable.
	+ Emphasize the essential services your providing
	+ Be proactive
* How do I message that we still need to raise money even though we received a PPP loan?
	+ Should we talk about it? YES let’s be transparent! (The Paycheck Protection Program is a loan designed to provide a direct incentive for small businesses to keep their workers on the payroll.--loan is time bound, specifically for payroll (salaries). Payroll includes: salaries, wages, etc. employee benefits, state and local taxes on compensation)
	+ There will be many added expenses beyond payroll**. It may benefit you to have a few buckets to encourage people to give to: PD (especially if we’re going digital), scholarship/tuition, strategic school planning ; for Jewish communal professionals who may have lost their jobs**
	+ It was a temporary fix for a specific problem that is now coming to an end (ending soon); they are also tired of Zoom so just acknowledge it; people are accepting of change right now; move past your hesitation and be bold in your asks. Know your donor well enough for this ask; know they are able

**Major Donors**

* Cultivate your major donors (whether that’s $1,800 or $18,000 donors) as if they were 6 figure donors.
* Create opportunities to bring major donors into the work; bring them in to the work of the school and the classrooms; send photos of grandchildren to grandparents; can they do projects together?
* Acknowledge that this is new
* Don’t be afraid to ask right now; and thank them; 7 times is a normal cycle of thanking donors and stewardship
* Do your research

**PAUSE FOR QUESTIONS**

**Emergency Campaigns**

* There are generally two ways to go about emergency campaigns- a private (silent) campaign or a public campaign.
* For both a silent and public campaign:
	+ Have clear target goals
	+ Know what your anticipated needs will are going to be
	+ Develop clarity around the use of the funds. This is not an endowment, it’s a spend down campaign with the intention of using it for a purpose and it’s done when it’s gone
* Silent Campaigns
	+ This is about tapping into major donors
	+ Some schools say they don’t want to “ensue panic” in the community
	+ Expectation that those major donors will be able to step up in a significant way and fill the void.
	+ There’s a faction of the community that now will not feel guilty about the fact that they cannot participate and/or need to request money
* Public Campaigns
	+ Think about what the public marketing is going to be, you can’t necessarily solicit one on one here. There’s a bigger investment required to launch a community wide campaign. They’re much more work – is the ROI worth is?
	+ You’re not limiting your prospective donor pool; yes, you’ll target major donors to give, but having an open campaign means someone could come in to give that you weren’t expecting. You could also target alumni, grandparents, etc. Customize the marketing to be specific to those constituents of people.
	+ Make giving super easy –text to give, quick link on the website or via an email.
	+ Celebrate publically- share a thermometer, post a donor honor scroll
	+ Allows for the community to give in appreciation and that visibility can play to your advantage
	+ Even if you do a public campaign, start with a small private campaign and target your major donors. The last thing we want is a major donor who could’ve given $10,000 if asked to see a public campaign and chip in a few hundred.

**Annual Campaign**

* Balancing the end of this year’s campaign and next year’s- it’s okay to tell people you’re closing your FY and here’s where we currently stand. Offer projections for next year as well.
* Start thinking about your plan for next year now; if reframing into a virtual campaign plan it now
* Take advantage of gratitude campaigns and messaging; think about the teachers; wall of gratitude; day of learning in honor of a teacher
* Deemphasize 100% participation as a major goal this year; have different participation goals; Does anyone have a waiver to be signed by parents to not hold the school accountable if their child/ren contracts COVID-19 while at school.

**Events**

* Be creative;
* Create shared experiences
* Don’t be afraid to toss everything you did before out the window and start from here
* A few ideas
	+ Poker tournaments
	+ Bathrobe ball
	+ Cycling events
	+ Modified golf events
	+ Scavenger hunt
* You may feel community building is the most important issue right now; even schools that have not charged for virtual galas have raised significant funds; seeing many more people making gifts