

TIP SHEET FOR NONPROFITS

9 Ideas to Move Your Organization from Crisis to Opportunity

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1

Grab the seat at the table that you have earned.

This crisis has made clear where philanthropy stands in each organization. Were you a partner with leadership during the crisis or was your team furloughed?

Regardless, now is the time to remind executives of the high return of philanthropy. Make sure they consider it essential to the organization. Set a private meeting to discuss with leadership and prepare a pro forma – executives think in terms of numbers, revenues and cost centers. Be concise and specific with what you need and how you can help. Use benchmarking to set your sights for where you want to be and know you can be.

2

Standardize new processes.

Organizations have embraced many new processes from digital communications and online giving to virtual events and meetings. Evaluate what changes have worked well for your team and which ones have not. Create best practices for moving forward so you can maintain the best of what you have learned.

3

Tap into your boards.

As a leader it is important to guide the board in the direction that best benefits the organization. The board should have input but should also be equipped with the most current information to make informed decisions. The best board members are those who help the organization to innovate. Make it a priority to call each of your board members to discuss their vision, the opportunities they see for the organization to innovate, and their thoughts on where you should go next.

4

Invest in the right technology and tools.

Do a technology audit now. Ensure your teams have what they need to seamlessly transition to remote work in the future if this is not already the case. If your organization had trouble transitioning to remote work, now is the time to put the systems and technology in place - this could be an ongoing way of working. Systems that work well remotely will also help your staffs to work more efficiently when they return to the office.



5

Reinforce the work of your organization.

Remind your community that your organization was a robust system providing a valuable service before this crisis and will continue to support them with the same high-level of care. The crisis is not furloughs or shortages. The crisis is the environment in which we are living.

6

Re-evaluate events.

This time gives you the license to do bold things. Experiences and events that were once considered sacred may be looked at differently now. Don't assume - get input about what your supporters want and are willing to contribute to. Rethink how you are working and look at opportunities to turn your events from an experience/party into something that really helps to identify likely major gift prospects.

7

Keep your focus on your highest value work.

Continue building and deepening relationships. If you are not connecting with you donors on their passions, someone else will. Done well, it can make the difference between transactional giving and transformational giving.

8

Retain your top talent.

Do everything you can to keep your top talent. Explain to leadership the importance of your major gift team in keeping philanthropy as a viable and sustainable revenue stream. In return, hold your gift officers accountable with activity goals, proposal goals, and clear definitions.

9

Create or tune up your strategic plan.

The best nonprofit leaders develop an organizational culture that functions simultaneously with intense realism and intense optimism. Map out your plan moving forward so you know exactly what needs to be done when. This will also make it easier to pivot if needed.

For more resources, visit ceplan.com/covid-19 or [watch the webinar](#) associated with this handout.

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