Communicating and Fundraising for Preservation in a Time of Uncertainty

APRIL 14, 2020

Geoff Handy, Chief Marketing Officer, National Trust for Historic Preservation
Robert Bull, President, The Compass Group

APRIL 14, 2020
Communicating and Fundraising for Preservation in a Time of Uncertainty

ROBERT BULL, PRESIDENT, THE COMPASS GROUP

April 14, 2020
What will we cover today?

1. COVID-19 Continuum
2. Pandemic & Economy
3. Philanthropy – Historically Strong
4. How do we approach donors now?
5. Show your value!

COVID-19 Declared National Emergency as of March 13!

MARCH 2020

APRIL 2020

Anxiety
Exhaustion
Resilience
Forward Thinking
Adaptation
Let’s take a poll: Where is your organization in the continuum of managing COVID-19?

Anxiety
Exhaustion
Resilience
Forward Thinking
Adaptation

Pandemic & Economy

Jerome Powell, Chair of the Federal Reserve

Darren Walker, president of the Ford Foundation

The Washington Post
Philanthropy is Historically Strong!!

From Giving USA 2019:

Total charitable giving reached $427.71 billion in 2018. In 2018, total giving adjusted for inflation is at its second highest year ever, less only than giving in 2017.

In current dollars, total giving has increased every year since 1978, with the exception of 1987, 2008, and 2009.

For the years 2009 (when the recession ended) to 2018, the growth in inflation-adjusted total giving is 33%.
## How do we approach donors now?

### Sensitive
*Everyone is impacted differently – it's all real*

### Accommodating
*Philanthropic relationship (capacity) may change*

### Authentic
*Living in the moment and recognizing certainty*

### Show your value!
*Live up to the mission and promises you made*

<table>
<thead>
<tr>
<th>How do we approach donors now?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Can I host an event?</strong></td>
</tr>
<tr>
<td><em>People are home, available, and plugged-in virtually</em></td>
</tr>
</tbody>
</table>

| **Can I cultivate donors?** |
| *Your friends want to know how you’re doing* |

| **Can I shift my focus?** |
| *Keep your mission, remain relevant, elevate priorities* |

| **Can I make an ask?** |
| *Don’t press pause – pace, and tailor your approach* |
Our mission is to build the capacity of our clients to successfully raise more money every day.

Communicating and Fundraising for Preservation in a Time of Uncertainty

GEOFF HANDY, CHIEF MARKETING OFFICER, NATIONAL TRUST FOR HISTORIC PRESERVATION
What We’ll Cover Today

• Why it’s ok to ask for donations during this crisis
• When it’s ok to ask for donations
• Guidelines for developing effective messaging
• Tactics to consider
What We’ll Cover Today

• Why it’s ok to ask for donations during this crisis
• When it’s ok to ask for donations
• Guidelines for developing effective messaging
• Tactics to consider

"The land of nonprofits is like an orchestra. Each organization, each sector is like an instrument. The work of the orchestra is to build a more civil society, and help to create a more perfect union. Every instrument matters."

- Joan Garry
The First Rule of Fundraising

What We’ll Cover Today

• Why it’s ok to ask for donations during this crisis
• When it’s ok to ask for donations
• Guidelines for developing effective messaging
• Tactics to consider
Every other week, we'll keep you posted on Conservancy news and programs, and send you curated content and stories that strengthen our shared passion for L.A.’s heritage and community.

You can also check our website, or social media for the latest updates on the return of our events, tours, and programs.

As you may know, events and membership fund our preservation work. Without the support of friends like you, we risk losing some of L.A.’s most beloved cultural and architectural resources.

Gran, we need your help to continue preserving the places in Los Angeles that matter!

Become a member for as little as $5 a month or make a gift to our Preservation Advocacy Fund.

Thank you for your support!

Great News! Historic Edinburgh Bungalows Saved

Store Spotlight: Gift Cards now Available

Give the gift of a future visit to President Lincoln’s Cottage! We are now offering e-gift cards which can be used to purchase tour tickets either in person or by calling us at 202-829-0436, as well as for merchandise in our museum shop when we reopen. Your purchase supports President Lincoln’s Cottage, a 501(c)3 public charity and helps us maintain critical operations during the COVID-19 pandemic. Thank you for your support.

Purchase here.
What We’ll Cover Today

• Why it’s ok to ask for donations during this crisis
• When it’s ok to ask for donations
• Guidelines for developing effective messaging
• Tactics to consider
Five Key Messaging Drivers During Crises

- Urgency
- Emotion
- Authenticity
- Sensitivity
- Relevance

The Trust’s Key Messages

- First and foremost, the National Trust is committed to the safety and well-being of its staff, partners, donors, and communities all across the country.
- During this unprecedented crisis, our unique role is to continue to connect Americans to our past and to one another.
- Historic sites are a source of comfort.
The Trust’s Key Messages, cont’d

• There are many opportunities to “escape” for a few moments to explore history virtually.

• Like other museums and cultural institutions, historic sites are facing challenges that come with the loss of revenue from tours, gift shops, and rental income from special events like weddings. Your support can help tide them over during this critical time.

What We’ll Cover Today

• Why it’s ok to ask for donations during this crisis
• When it’s ok to ask for donations
• Guidelines for developing effective messaging
• Tactics to consider
**Fundraising Tactics to Consider**

- Update your website donation form(s)
Fundraising Tactics to Consider

• Update your website donation form(s)

• Create a campaign
  – Give it a name; consider a special “fund”
  – Run a match campaign if you can
  – Set a specific goal
  – Consider linking your membership program to the campaign

Unlocking Montpelier

While Montpelier is Closed, See What Happens Behind its Doors!

The Montpelier Foundation
What is "Unlocking Montpelier"?

We are in a unique position during this time to keep Montpelier “virtually” open for business by educating, inspiring, and engaging you with our continuing work. We invite you to “Unlock Montpelier” with us, square foot by square foot. We have so many rooms in the house to share, and so many stories to tell. Help us unlock them all!

We are grateful to you for your commitment to Montpelier during this challenging time. So, for every donation made, we will unlock one square foot of the main house. As squares are unlocked, we will gradually reveal videos, images, and other special content from our experts who take care of, study, research, and interpret this house every day. You will learn about archaeological discoveries, architectural clues that
Fundraising Tactics to Consider

• Update your website donation form(s)
• Create a campaign
  – Give it a name; consider a special “fund”
  – Run a match campaign if you can
  – Set a specific goal
  – Consider linking your membership program to the campaign
• Try tactics from the field of behavioral economics
Fundraising Tactics to Consider

• Update your website donation form(s)
• Create a campaign
  – Give it a name; consider a special “fund”
  – Run a match campaign if you can
  – Set a specific goal
  – Consider linking your membership program to the campaign
• Try tactics from the field of behavioral economics
• Reach out to local media

Remember:
You Can’t Please Everybody All the Time
Thank you!

QUESTION AND ANSWER

Use the chat box on the bottom right to ask questions of the speakers.
Keep Talking

- **Forum Connect** is Forum’s online community
- FREE and open to everyone

Forum.SavingPlaces.org/Forum-Connect

---

Keep Learning

- Transforming Digital Engagement at Historic Sites, April 20
- Coronavirus Response: The Historic Tax Credit as an Economic Recovery Tool, April 24
- Insurance-related topics to the Coronavirus that can help your Organization, April 28
Thank you!

Visit Our Website:
forum.savingplaces.org

Watch for Upcoming Webinars & View
Webinar Archives:
forum.savingplaces.org/forum-webinar

Contact Us:
forumonline@savingplaces.org