A Marts & Lundy Special COVID-19 Report

Key Considerations for Schools  
  
  
In General

* These are very unprecedented times, but there is much to be learned from philanthropic responses to other challenging situations, including: 9/11; the Great Recession; and environment tragedies (hurricanes; tsunamis; tornadoes, earthquakes and fires). Donors continue to give even in the most difficult times.
* The current situation is unique as it added a component that it does not have a clear end date, leaving school leaders in the challenging space of “anticipating” what might have to be done next, especially as related to school closings, commencement ceremonies and even the 2020-21 opening of school.
* This is a layered situation: 1) Short term: thinking of COVID-19, how we work, how people connect; 2) Longer term: thinking of economic turbulence, how we fundraise, how people give.
* Fundraising should *and must* continue. Your needs are no less important – and philanthropy may indeed be more vital than ever. But recognize that this is not a time for “business as usual.” The language around the appeal must be changed.
* Elements of the CARES Act in the US may positively impact giving at the annual and major gifts levels.
* This presents an important opportunity to reflect, revisit strategies and clean up systems and processes. Position the school to be in an even stronger place when the situation returns to normal. If you have a strategic plan, it will need to be tailored or even put on hold. Consider sketching out a one-year action plan, subject to revision. A crisis presents challenges but also opportunities for change, innovation, and creativity.

Communication

* To lead with empathy is more important than ever, in both internal and external communications.
* Communication has never been more important. Communicate regularly, but not constantly. Be concise and focused on critical new information.
* Reach out regularly to the board chair, executive committee, and other relevant board committees, and all board members to keep them informed and to secure their ideas and reactions. This includes advisory boards and junior boards. Good governance is still important.
* The important decisions in this crisis will be seen by an organization’s many stakeholders, external and internal. Leaders must communicate and listen to those whose support is essential for the short-term and long-term. Be genuine and honest.
* Focus on sending positive, forward-looking, forward-thinking messages (don’t refer merely to problems and challenges alone). Share how your mission is being delivered in this virtual environment.
* Acknowledge the situation your school is in. Tell your story, show impact.
* Do not stop communicating with people especially those closest to you like donors with active pledges, past major donors, and prospects. People who often do not have time to engage with you may have more time now and may be more amenable to conversation.
* Create a vision of where you see your organization in one year. Do this in a participative way, at least with the top management team and board. Articulate this vision so that all stakeholders know where you are going.

Donors/Prospects

* You know each donor best and can determine whether they need space or an outreach. Many have expressed appreciation for the check-ins taking place by Heads of School, administrators, and staff.
* Do not make assumptions about donor situations. Let them tell you how this is affecting them. There are plenty of individuals who will continue to support the organizations that matter to them.
* Identify potential “problem-solving” or “heroic” donors who may not be affected financially by the current crisis. They may be doing better than most and willing to help.
* Significant wealth is held in donor advised funds. The individuals who contributed to these DAFs have already earmarked these assets for charitable giving.

Stewardship

* Redouble stewardship efforts when possible.
* You can also “steward” existing relationships, not just past giving in the literal sense of “this is what we did with your most recent gift.”

Fundraising Priorities Your School Might Consider

* You might focus in the short term on relief efforts and emergency funds (if those funds are needed), and later on budget relief (financial aid, unrestricted needs). Many donors may wish to focus their philanthropy ever on people and the school’s wellbeing (and less for the time being on new construction projects.)
* Bricks and mortar priorities might be tweaked to continue with some key vital projects.

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Managing and Supporting Your Team

* Learning to work remotely is new for most staff members. Connect often to maintain or even build a sense of community. Learn how to run virtual meetings.
* Develop short-term plans for each program, prioritizing revenue-generating activity. Everyone can play a role.
* This crisis is fraught with emotion. Make sure staff members know that you care about them and that they are valued. Work at motivating your team and promoting peak performance. You cannot lead through this crisis alone; distribute work to get things done. Make every effort to retain talented, key staff.