

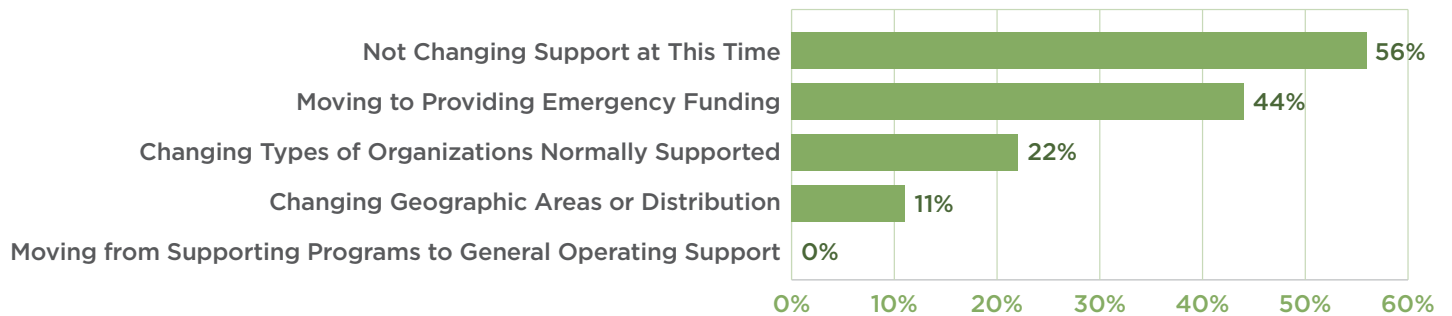
THE INDIVIDUAL DONOR SECTOR ADDENDUM

INDIVIDUAL DONORS, wealth managers and advisors, and donor advised funds (DAF) holders were also contacted to solicit feedback on how they are managing through the COVID-19 crisis. This smaller subset of nine respondents provided the following responses.

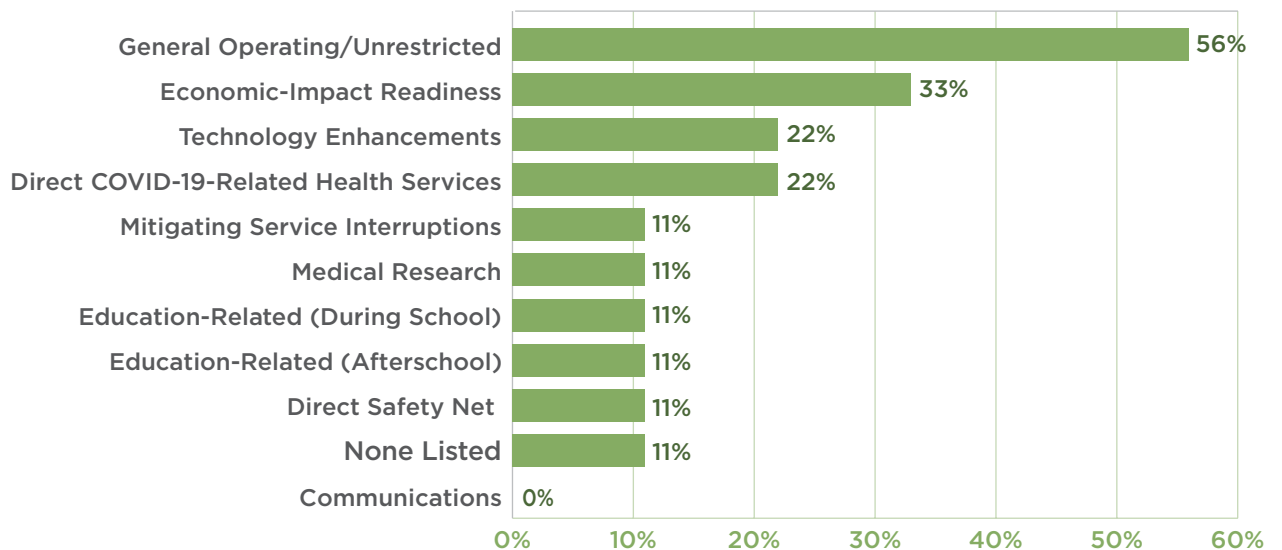
Nearly all the funders provide grants across multiple areas of support. Arts, and transition-aged youth and foster youth represent the areas of most concern for these donors.

Donors were split between making no changes in their outreach strategy and those making slight shifts. The largest shift was to support emergency funding for their grantees.

WHAT SHIFTS ARE YOU MAKING?



AREAS THAT YOU WOULD SUPPORT



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More than half of the individual donor sector saw General Operating Support (GOS) as an important way to provide support to nonprofits at this time.

When asked to identify the types of organizations or programs that they would be open to supporting specifically around COVID-19 response, those in this sector indicated the following areas:

- Medical research
- Telehealth for access
- Testing and contact tracing
- Food insecurity, including food banks for pets
- Virtual program delivery

In looking at areas of capacity building for nonprofits (aside from GOS), donors and advisors saw the following areas as important:

- Advocacy
- Diversity, Equity, and Inclusion (DEI) recovery
- Nonprofit sustainability
- Communications
- Strategic planning

Of those who saw opportunities for deeper engagement with their grantees, some noted that the virtual world we are currently operating in has made it easier to remain in contact with the nonprofits they support. They can be timelier in responding, especially around immediate needs. One donor expressed that they are careful about checking in with their grantees to reduce additional work on the part of the nonprofits. Keeping connected with an organization's leadership was not done to check on their work but to better understand the nonprofit's needs. They also understand the importance of making the grantmaking and reporting processes less arduous during these times.

LEARNING NEEDS

SURVEY PARTICIPANTS were asked to rank their own learning needs on a scale from 1 (least) to 5 (most). As with foundation staff, learning about various COVID-19 response models was most important to donors and advisors. The least important was learning about general grantmaking processes or strategies, where scores were about one-third less than that of COVID-19 response models.

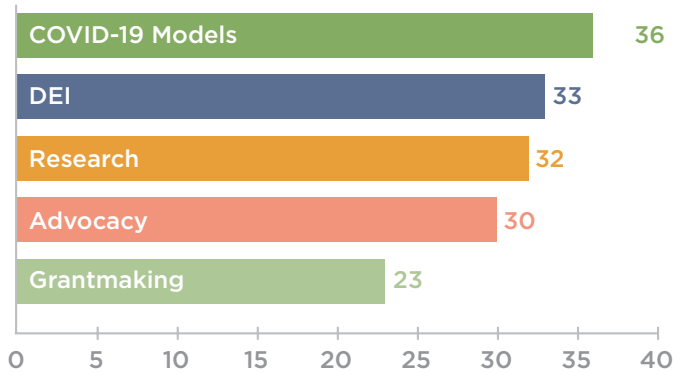
In separating out the data between individual donors/DAF holders and wealth managers/advisors, some differences appear in the types of learning support sought by each group. COVID-19 response models score highly for both groups, but research scored slightly higher among individual donors as most important. The largest gap in what was seen as important was in advocacy training. Advocacy tied for last among the individual donor/DAF holder group while it was a very close second for wealth managers/advisors.

NEW CHALLENGES, GREATER CALLINGS:

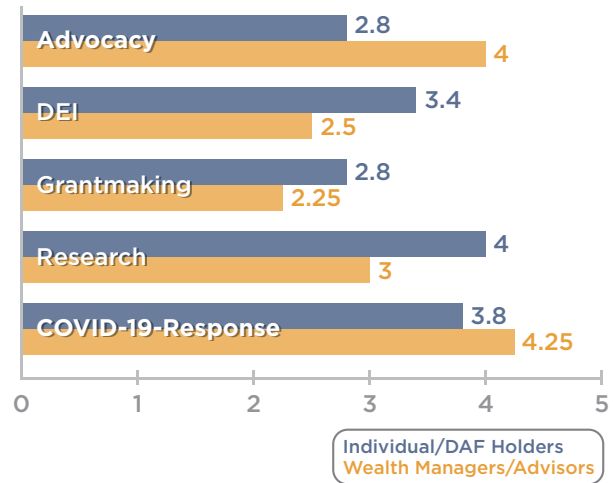
Exploring the Needs of Philanthropy in Times of Change

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LEARNING NEEDS BY IMPORTANCE
(Weighted Scores)



LEARNING NEEDS BY GROUP



RANKING OF IMPORTANCE

OVERALL	INDIVIDUAL/DAF HOLDERS	WEALTH MANAGERS/ADVISORS
COVID-19 Response Models	Research	COVID-19 Response Models
DEI	COVID-19 Response Models	Advocacy
Research	DEI	Research
Advocacy	Advocacy (tie)	DEI
Grantmaking	Grantmaking (tie)	Grantmaking

TRAINING

WHEN ASKED to provide more feedback on the types of training they would like to see, respondents talked about areas of grantmaking. One DAF holder expressed interest in what lessons were learned from the Great Recession. Advisors expressed interest in learning more about the power of multi-year funding for community-based organizations. According to the Stanford Social Innovation Review,¹ “Multi-year funding allows nonprofits to respond to crises and opportunities, and to build internal and external capacity. It contributes to sustainability and greater staff retention, allows grantees to respond to new community problems, and improves planning and leadership development.” One advisor mentioned wanting to learn more about trust-based philanthropy models. Multi-year, Unrestricted Funding is one of six key principles of trust-based values elevated by the [Trust-Based Philanthropy Project](#). The other values cited include simplify and streamline paperwork, solicit and act on feedback, do the homework, be transparent and responsive, and offer support beyond the check.

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RESEARCH

THE RECOVERY PHASE of the response to the crisis ranks highly for individual donors. They expressed interest in research and strategies that philanthropists can use that will facilitate inclusive and equitable recovery. Wealth advisors shared similar concerns and want to understand what nonprofits need the most.

Advisors shared those same concerns, particularly in viewing nonprofits as small businesses and wanting to understand what nonprofits need. More research is needed as to how the sector has been impacted, particularly around how nonprofits are dealing with unemployment, furloughs, and other business impacts. They also want to understand at a deeper level the connection to issues around DEI. Advisors are interested in more research regarding the role of advocacy, the role of advocacy for individual donors, and its potential impact.

While the subject did not receive a great deal of attention in either the general survey of institutional donors nor this particular subset, one advisor did express the need for information about what the medical research community is doing around possible COVID-19 vaccines and how best to support the research and the eventual distribution of vaccines or cures.

NOTES

1. Niki Jagpal & Kevin Laskowski (12 November 2012). [“Foundations Must Get Serious About Multi-Year Grantmaking.”](#) Stanford Social Innovation Review.



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