

How Are You Managing Your Teams and Philanthropic Services Moving Forward?

July 14, 2020 Community Foundation Network Topical Call – Chat Log

14:01:14 From Tony Macklin : How Are You Managing Your Teams and Philanthropic Services Moving Forward?

- 1) How has your foundation decided to balance in-office and remote work?
- 2) How are you adjusting service delivery models through the end of 2020?
- 3) How are you modifying metrics and performance expectations in your donor service and development plans?

14:08:08 From Kelly Sweet BTCF : sorry everyone! mic problem. Kelly Sweet here in western mass. Berkshire TACONIC, I am a community Engagement Officer.

14:14:09 From Tony Macklin : For everyone: Please share any HR policies or forms you're using for remote working or spread out time in the office

14:16:37 From Kelly Sweet BTCF : we are staying remote as long as possible. we follow the same set up. receptionist and finance go in, we scan everything.

14:17:25 From Tony Macklin : For all: Have you implemented any new technologies or systems to ease remote work or virtual services to donors?

14:17:41 From Jen NCFP : Thanks Thomas and Melinda for sharing your policies!

14:18:09 From Rebecca Rothey : Teams and Zoom

14:18:42 From Rebecca Olchawa Barker : Teams. So useful!

14:18:43 From Thomas Griffith : We are looking into DocuSign.

14:18:51 From Vicki - NTCF : GoToMeetings and Mr. Conference, DocuSign

14:19:15 From Rebecca Rothey : Adobe Docs

14:19:18 From kmontez : We are also using DocuSign, Teams and Zoom. All have worked well in keeping us connected.

14:19:19 From Elly Grogan : Slack, Zoom, DocuSign

14:20:41 From Melinda (she/her) : Teams, Zoom, DocuSign and a phone triage system that I can't remember the name of. We already had a robust platform for RE/F/GE for remote workers but we had to add additional bandwidth and capacity for our servers.

14:20:45 From Elly Grogan : Same for us with what Eric said--staff are really nervous about going back in.

14:21:48 From Rebecca Olchawa Barker, Community First Foundation : We started using DocuSign about a year ago and it's been a huge efficiency.

14:22:34 From Eric Anderson (The Minneaoplis Foundation) : We are close to "flipping" to ACH as well

14:22:41 From kmontez : We are also moving away from checks to ACH and will continue that. Nonprofits love that!

14:30:02 From Tony Macklin : Dallas Foundation trying a virtual site visit for donors - anyone else doing that?

14:30:56 From Tony Macklin : Answer in chat and I'll pull out some examples: How are you adjusting service delivery models through the end of 2020?

14:33:57 From kmontez : We have also had conversations with our CEO on topical issues including how we are responding to COVID short term and long term.

14:34:46 From Elly Grogan : We've hosted four virtual donor education events on COVID--two on community needs that are emerging, and two deep dives-one on mental health impacts from COVID and one on impacts on small businesses.

14:35:13 From Melinda (she/her) : We have hosted regional conversations on COVID response with donors via Zoom and our CEO/staff.

14:36:26 From Melinda (she/her) : On the program side, we've hosted info sessions for nonprofits applying for CARES funding that we are administering for the State of NH.

14:37:54 From Tony Macklin : How else are you adjusting service delivery models through the end of 2020?

14:38:34 From Vicki - NTCF : We've seen engagement drop as well.

14:43:21 From Tony Macklin : For polling and audience interaction, a couple high-end professional advisors I know are big fans of <https://www.mentimeter.com/>

14:43:43 From Jen NCFP : Slido is another good tool for voting and Q&A: <https://www.sli.do/>

14:48:31 From Rebecca Rothey : Please share a copy of your stewardship plan.

14:50:52 From kmontez : We have done the same and our donors are very interested in knowing what we are doing.

14:52:57 From Julia : how are y'all planning to onboard/train new staff in a more virtual platform?

14:54:50 From Elly Grogan : We met our annual planned giving goals in the first six months of the year; but expecting less year-end giving to DAFs.

14:57:23 From Tony Macklin : Coming up: Oct 7-8 Virtual CF Workshop
<https://www.ncfp.org/event/2020-community-foundations-family-philanthropy-network-workshop/>

14:58:04 From Tony Macklin : Upcoming Aug 11 topical call:
<https://www.ncfp.org/event/envisioning-the-future-of-family-philanthropy-a-conversation-with-nick-tedesco/>

14:58:46 From Tony Macklin : Upcoming Aug 20 Spark Session webinar
<https://www.ncfp.org/event/cf-spark-session-community-foundation-business-models-for-family-philanthropy-round-4/>

14:59:31 From Jen NCFP : While Katie is out on maternity leave, feel free to email Tony (tony@tonymacklin.com), myself (jen@ncfp.org), or community@ncfp.org with any questions