

Developing Recommendations for Virtual Fundraisers and Virtual Events for Habitat for Humanity

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Abstract

The COVID-19 pandemic caused global problems and put the world into a downward economic spiral. Nonprofit organizations, who rely on the engagement and contributions of donors, have been hit especially hard. In our project we worked with Habitat for Humanity MetroWest/Greater Worcester to develop virtual fundraising ideas and events to salvage lost income and community engagement. We conducted content analysis, interviews, and utilized discussion boards to create a Fundraising Comparison and Decision Tool to identify events that meet our sponsor's needs. We also created an in-depth fundraising guide, or "Playbook", to assist with the execution of these events.

Acknowledgments

This project would not have been possible without the help and support of so many people. We have many different people to thank, but we would like to give a special thanks to:

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And a final thanks to all the people who allowed our team to interview them over the course of our project. The data we obtained from each interview was vital to the success of our project. We have been consistently blown away by how willing people were to share their time and knowledge for the sake of helping others.



Executive Summary



In early 2020, the COVID-19 pandemic affected people around the globe and created economic problems worldwide. Hit especially hard by these economic problems was the nonprofit sector, with many nonprofit organizations (NPOs) on the brink of bankruptcy. In April of 2020, a survey of NPOs showed that over 40% of organizations were in difficult financial conditions (Maher et al., 2020). Another survey of the financial impacts of COVID-19, during the summer of 2020, by the Charities Aid Foundation of America found “[O]ver 70% of the survey respondents are struggling to cover salaries, 32% need additional funding for technology and more than 20% cannot pay office rent and utilities” (CAF, 2020, p. 1). This is because many NPOs obtain large parts of their funding through social and in-person fundraising events. These events can no longer run due to the quarantining and isolation policies used to prevent the spread of COVID-19.

One of the affected NPOs is our project sponsor, Habitat for Humanity MetroWest/Greater Worcester (Habitat MetroWest/Greater Worcester). Habitat for Humanity is a global nonprofit whose mission is to support aspiring homeowners and provide them with affordable housing. In addition to supplying a house, Habitat aims to create an environment where families can be nurtured (HfH, 2020). To assist this branch of the organization, we developed recommendations of virtual fundraisers and events to help offset the challenges presented by the pandemic. Our goal was to create and recommend a comprehensive virtual fundraising strategy that helps Habitat for Humanity MetroWest/Greater Worcester bridge the gap between traditional and online fundraising. This strategy included plans for efficient, engaging virtual events that fit the Habitat for Humanity mission. This goal was further broken into four main objectives, which are as follows:

1. Research various past fundraising events, both online and in-person, and evaluate the outcome of these events, as well as determining the strengths and weaknesses of running them virtually.
2. Gain an understanding of Habitat for Humanity’s fundraising culture, their fundraising needs, and their past fundraisers.
3. Research how fundraisers are analyzed/measured and use this information to analyze the cost effectiveness of fundraisers.

4. Develop recommendations of effective virtual volunteer events and fundraisers that meet the criteria set by Habitat for Humanity.

These four objectives allowed us to gain a full understanding of what Habitat for Humanity MetroWest/Greater Worcester is looking for in a comprehensive virtual fundraising strategy and to develop events and tools that best meet their needs.

To successfully meet our goal and objectives, we developed a research strategy that allowed us to gather the required information effectively and efficiently. Habitat MetroWest/Greater Worcester wanted as detailed a description of the virtual fundraising events as we could provide, so we used interviews to allow for a more holistic understanding of qualitative data. Our first priority was gathering firsthand accounts of virtual fundraising events from the event planners and organizers themselves. We conducted interviews with event organizers who had put on virtual fundraisers to gather information on several aspects of the virtual fundraising process that would be helpful to Habitat. Specifically, we investigated time required for the planning process, issues event organizers encountered, helpful technological tools, expense drivers, and the financial and engagement outcomes of the events.

We used internet research to supplement the information gained from interviews and to allow our team to make “outside of the box” recommendations to Habitat MetroWest/Greater Worcester. Interviews were a great way to understand the real-world experience of planning an event but limited our ability to gather information on fresh or unexpected fundraising ideas, as many of the groups within our reach had all done similar events. Habitat MetroWest/Greater Worcester wanted to broaden their understanding of what a virtual fundraiser could be, so internet research gathered information about what new ideas people had tried and how they might be applied to Habitat MetroWest/Greater Worcester. For these new event ideas, we gathered the same type of information as we did with interviews, with an additional focus on whether the event is able to fit with Habitat MetroWest/Greater Worcester’s fundraising culture and technical experience.

From the various data collection tools used, we identified several themes that were repeated across multiple sources. The most common findings were as follows:

Be creative. This was by far the most common idea we encountered during our data collection period, and it was mentioned in most of our interviews. It was especially emphasized



during our interview with American Training Inc, who impressed upon us that there is a need for people to “work outside the box” during this unprecedented time. As a result of Covid-19, many of the memorable and enjoyable aspects of in-person events are lost, so new and creative solutions need to be reached to replace them. Often this means completely reworking an event that had been run in a similar way for years to make it stand out as an online event. There are minimal resources to use as a guide, so the success of these virtual events will fall to the ingenuity and creativity of the staff organizing them.

Temper your expectations of the event. This idea was mentioned in four of our eight interviews, with the best example coming from our interview with the Habitat for Humanity Springfield branch. In the interview they emphasized that they were most pleasantly surprised by the outcome of events that they went into with no expectations. There is a learning curve to hosting virtual events, so the first few times they are run will probably not meet lofty expectations. However, due to the reduced costs associated with many virtual events, failure is not as great a setback for a virtual event as it is with their in-person counterparts. The potential for success is there and is achievable.

Be prepared - Have backup plans - Practice often. When people are learning a wide range of online software and tools for the first time, there are many things that can go wrong. The best way to mitigate these effects is to be prepared by practicing using the software as much as possible and by having backup plans ready in case a problem arises during an event. Being prepared for technical failure can help make the event a better experience for the participants and make it more successful. In our interviews, many organizations experienced some type of technical problem during their event that detracted from its success. The most successful organizations, however, had a backup plan to proceed with, either to buy time to fix the technical problem or maintain a smooth flow of the event.

Marketing and Advertising are vital. This is an area in which the strengths of online fundraising stand out. Because the barrier to entry for these events is often much lower than with traditional events, publicizing an event has a much greater potential to attract a new audience. Events need to be advertised well in advance to give people plenty of time to be made aware of the event and to make plans to attend. Liberal and effective use of social media has proven a particularly inexpensive and effective way of getting the word out. Last minute reminders of the event are also helpful, as last second distractions in their home or workplace could cause people



to forget about the event and miss it. As mentioned during our interview with Girls on the Run Worcester County, social media was very important to the success of their event as the various platforms allowed them to reach a wide base of people with their event promotion efforts.

Use others' expertise to your advantage. This idea was mentioned in a couple of our interviews, both African Community Education and the Worcester Historical Museum discussed how they paid for professional services for their events and it helped to make their events more successful. The Worcester Historical Museum even said, “it was the best money they ever spent”. As stated before, many people are learning these tools and software for the first time, but there are also people who have been using them for years and are experts at using them. Partnering with organizations experienced in using unfamiliar tools is a great way to save valuable time. Conversely, this expertise comes at a cost, so a cost benefit analysis needs to be performed to determine if the additional success of the event is worth the additional cost associated with it.

Based on all the information gathered, we found that fundraising through a virtual format is not only possible but can broaden the horizons of NPOs in terms of demographics reached and fundraiser accessibility, while costing less than in-person events. In a virtual format, NPOs can reach populations outside of their physical location. For example, the Springfield, MA, Habitat for Humanity branch stated people from as far away as Colorado were able to attend their virtual auction.

In addition to our findings, we developed a Fundraising Comparison and Decision Tool that ordered researched fundraisers by lead time, staff required, required finances, net profit, and expected engagement. Through the interview process and the help of Habitat MetroWest/Greater Worcester’s fundraising development team, we created the comparison sheet with a color coded simple, easy-to-read key. The spreadsheet can be further developed by our sponsors, as the layout and criteria we used to develop it can fit all events, not just virtual or COVID friendly events.

To supplement the comparison sheet, we developed an in-depth guide, or “Playbook,” that detailed expenses, drawbacks, critical steps, etc. for each proposed event. We recommend that Habitat for Humanity MetroWest/Greater Worcester use the Fundraising Comparison and Decision Tool to quickly determine possible events they could use given their time and money constraints as well as their goals. Once the organization has an idea of what events would work



for a specific situation from the spreadsheet, the Playbook gives further insight into the planning and execution of those ideas. The Playbook describes the events and how they would work and contains any available resources or leads that we found while researching. Much like the spreadsheet, the Playbook can also be added to by our sponsors if new ideas are discovered.

The COVID-19 pandemic presented NPOs with a unique opportunity to move from costly in-person fundraising events to virtual events. To address this shift in culture we created an innovative virtual Fundraising Comparison and Decision Tool and Playbook to allow our sponsor to understand the new fundraising culture and how to navigate it. While there will always be a place for in-person events in the future, virtual events provide an organization with a low-cost way to engage new constituencies online.



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Authorship Report

<u>Section Title</u>	<u>Primary Author(s)</u>	<u>Primary Editor(s)</u>
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Background - Habitat for Humanity	Duncan B	All
Methodology - Objective 1	Andrew D	All
Methodology - Objective 2	Andrew S	All
Methodology - Objective 3	Duncan B	All
Methodology - Objective 4	Blake A	All
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Recommendations	Andrew S	All
Conclusion	Blake A	All

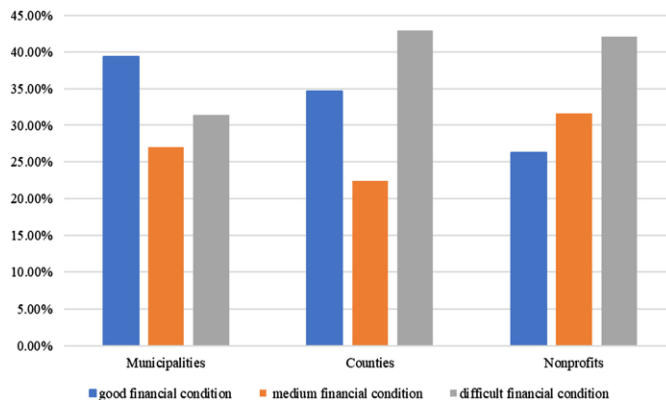


Introduction



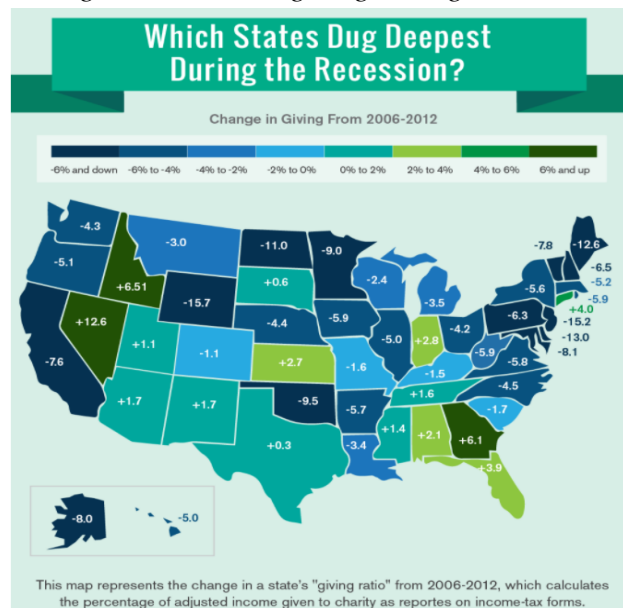
In March 2020, the COVID-19 pandemic caused nonprofit organizations (NPOs) to make a sudden and drastic shift to their fundraising strategy by cancelling nearly all in-person social gatherings. For groups that relied on large events to fundraise, like NPOs, this made effective fundraising next to impossible. In April of 2020, a survey of NPOs showed that over 40% of organizations were in difficult financial conditions, as shown in Figure 1 (Maher et al., 2020). This survey was taken when the effects of COVID-19 on the economy were beginning to show and displayed the scale of the devastation caused by the pandemic.

Figure 1
NPOs in difficult financial conditions



(Maher et al., 2020, p. 1)

Figure 2
Change in charitable giving during the recession.



(Shuck, 2020)

Another survey of the financial impacts of COVID-19 was conducted over the summer of 2020 by the Charities Aid Foundation of America (CAF). This survey found that, “[O]ver 70% of the survey respondents are struggling to cover salaries, 32% need additional funding for technology and more than 20% cannot pay office rent and utilities” (CAF, 2020, p. 1). Furthermore, NPOs are known to suffer during difficult financial times. Due to COVID-19, both the United States and the world entered a time of slight recession. In a study to research the impact of

economic downturn on the nonprofit sector, it was found that charitable giving usually falls in recession years (Bridgeland et al., 2009). Figure 2 shows that during the 2008 recession, public charitable giving dropped 5.2%. Additionally, recent surveys taken on fundraising have shown downward trends for the past few years. The number of American households that donate decreased by over 20% between 2002 and 2016 (Bell et al., 2020). NPOs need to have success in



fundraising to execute their mission, especially now. During the pandemic, NPOs are both a critical resource for thousands of people, and one of the areas that suffered the most. The situation was heartbreaking; however, this was the time for people to rise up and help. Our team, created for this project, set out to make recommendations to Habitat for Humanity MetroWest/Greater Worcester (Habitat MetroWest/Greater Worcester) on ways to adapt to the economic climate and hopefully inspire other NPOs to do the same.

Habitat MetroWest/Greater Worcester relied on volunteers and in-person events to accomplish their mission of supplying affordable housing to the less fortunate in the Worcester area. With COVID-19, they cannot hold these events due to the necessity for social distancing. In addition to dealing with the consequences of COVID-19, Habitat MetroWest/Greater Worcester is also dealing with the loss of resources and volunteer interest in the organization due to limited in-person events.

The goal of this project was to research and develop recommendations for virtual fundraisers that are financially efficient and easy to organize, in addition to recommending ideas for fun and engaging virtual event opportunities that fit the Habitat for Humanity mission. We began by finding examples of similar fundraising events, both online and offline, to develop an understanding of how similar events were developed and planned, as well as their relative strengths and weaknesses. Next, we researched existing literature and worked with Habitat MetroWest/Greater Worcester to develop metrics for analyzing both the cost effectiveness and feasibility of fundraising activities and used this information to analyze potential fundraisers. Finally, we developed effective fundraising strategies that met the criteria set by Habitat MetroWest/Greater Worcester to help them transition into a more virtual format for both fundraisers and volunteer events before presenting our findings to Habitat MetroWest/Greater Worcester.

In the next chapter, we discuss background information on nonprofit organizations, nonprofit funding, the impacts of Covid-19, virtual fundraising opportunities, and the Habitat for Humanity organization. In Chapter 3 we detail the methodological approach we take to meeting our goal, including the questions we answer, why they are relevant to meeting our goal, and how we go about answering them. In Chapter 4 we discuss the findings of our research and why it



was relevant and important information. Finally, in Chapter 5 we discuss our recommendations for Habitat MetroWest/Greater Worcester and how to effectively use the tools created for them.

Background



Nonprofit Organizations

Nonprofit organizations are organizations dedicated to furthering a particular social goal or providing a public benefit. In order to be classified as a nonprofit by the United States Internal Revenue Service, the organization needs to operate for the exemption purposes set in the US tax code and none of the organization's profits can benefit an individual (*Exemption Requirements - 501(c)(3) Organizations / Internal Revenue Service*, n.d.). Additionally, NPOs are required to make their financial and operating information public, so donors and volunteers can make informed decisions before interacting with the organization.

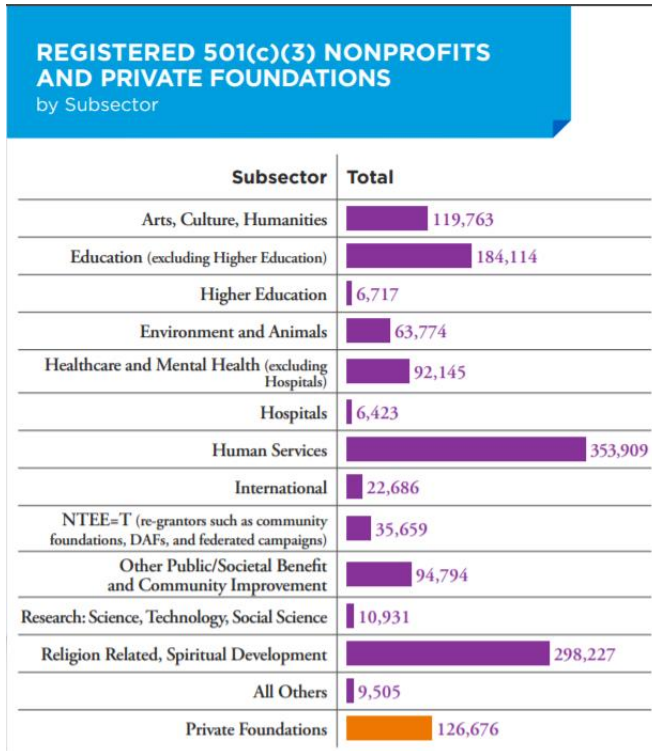
There are 1.5 million nonprofit organizations in the US which represent the third largest sector of the US economy, behind only retail and manufacturing, employing 12.3 million people and spending nearly two trillion dollars annually (Duffin, 2020; Gourley Carter et al., 2019). In addition to the work they do directly, NPOs benefit the economy through money spent on goods and services and creating more jobs. Locally, NPOs help spur economic activity, and support businesses and communities (Mitchell, 2005). The benefit of NPOs on the economy and on communities cannot be understated.

Within the nonprofit sector, there are many different types of organizations. Figure 3 displays the major sub-sectors that made up NPOs as a whole and the number of individual organizations that made up each sub-sector. In addition, Figure 4 below breaks down payroll expenses associated with each subsector of NPOs. As shown in the figure, hospitals and other healthcare organizations contribute heavily to the economic significance of NPOs, even though there are relatively few of them, compared to the other NPO sub-sectors. Conversely, while human services are the largest sub-sector (by nearly 56,000), their payroll is only the fourth largest, showing the reliance of this type of organization (like Habitat for Humanity) on volunteers.



Figure 3

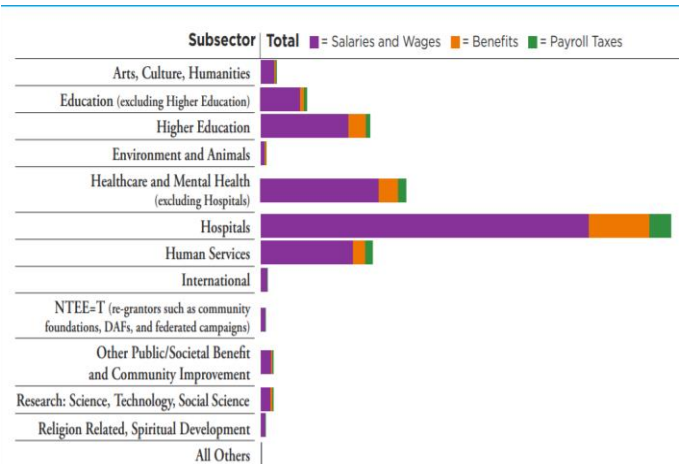
Division of nonprofits across various economic



(Duffin, 2020)

Figure 4

Nonprofit Payroll Expenses



(Duffin, 2020)

The diversity of goals within the nonprofit sector is expansive, as many organizations have unique goals and objectives. Despite these differences, all of these NPOs share many similar aspects. The biggest similarity is the reliance on volunteers to help the organization achieve their goal, by assisting in spreading their message, pitching in executing events, helping with fundraising efforts, and more. While NPOs are permitted to have paid staff, the staff are typically responsible for managing volunteers, while the volunteers do any legwork. This is due to regulatory scrutiny the NPO would face if its salary expenses are too high compared to their program expenses (“Nonprofit Organization”, 2020). This reliance on volunteers requires NPOs to have high levels of public trust so people are more comfortable volunteering their time, effort, and skills to the organization. In fact, during 2017, the most recent year data was available, 64.4 million Americans volunteered for an average of 137 hours each. The value of this time was estimated at slightly less than 200 billion dollars (Duffin, 2020).



Nonprofit organizations play a large role in the community, but the community also plays a large role in the organization through their donations and volunteer hours. Due to their reliance on volunteerism and fundraising, the biggest challenge these organizations typically face is lack of funding, so organizations must be innovative and effective in their fundraising efforts.

Nonprofit Funding

Critical to meeting our goal was understanding the specific methods NPOs used to raise funds, along with the broader strategies that informed those methods. To begin, we researched the broad classifications that NPOs used to organize their fundraising. Steve Lew, a Senior Projects Director at CompassPoint, an organization dedicated to advising and developing NPOs, explained that funding comes primarily from six sources: government grants, charitable foundations, corporate giving, individual donors, annual events, and earned income (Lew, 2016). Each of these sources comes with their own positives and negatives, and each organization should tailor their fundraising strategies according to these factors. The most notable of these sources for our project were individual donors, annual events, and earned income. This was determined through an interview with our sponsor, who emphasized the importance to them of community outreach, annual large fundraisers, and Habitat MetroWest/Greater Worcester ReStores, stores that take donations and sell them to the community. (M. Pietrantonio, personal communication, November 9, 2020). Giving USA, a publication reporting the sources and uses of charitable giving in the US, reported in 2019, 69% of all charitable giving was from individuals. This number grew significantly from 2016 through 2020, increasing almost five percent from 2018 alone (Giving, 2020). However, NPO reliance on individuals in fundraising had proven to be a key weakness during the pandemic.

Covid-19

The insurgency of the COVID-19 pandemic crippled NPOs' fundraising efforts. A survey completed over the summer of 2020 showed over 70% of global NPO survey respondents were struggling to cover salary costs and over 32% needed additional funding for more technology (CAF, 2020). This survey, conducted by the Charities and Foundations of America (CAF), also showed that over a third of global NPOs were thought to close within a year starting the summer



of 2020 and that 16% of those NPO's received no funding at all in the month of June 2020. COVID-19 negatively affected the NPO community by cutting off traditionally reliable sources of revenue. After the initial impacts of the COVID-19 outbreak, Maher et al. (2020) found that to counter the decrease in funding, nonprofit organizations were taking actions that affect staffing such as pay cuts for high earning employees, salary freezes, and hiring freezes.

The negative impacts of the COVID-19 pandemic did not stop there. The Independent Sector conducted an online survey, with the Washington Council Ernst and Young, of mid-sized NPOs between May 27th and June 9th, 2020 and found disturbing statistics about the impacts of COVID-19 on the NPO community. The survey showed 83% of mid-sized NPOs experienced a major reduction in revenue and 92% of the total mid-sized NPOs, when asked what types of assistance would be most helpful, suggested additional loan options such as forgivable loans (Independent Sector, 2020). The survey also showcased how there was a 47% total reduction in nonprofit jobs reported compared to April 2020 and prior. Specifically, 67% of NPOs had to furlough employees and 51% of NPOs had to lay off employees since the start of the COVID-19 pandemic (Independent Sector, 2020).

By far the most detrimental impact of the COVID-19 pandemic on NPOs was the inability to perform in-person events or fundraisers due to government required social distancing restrictions and lockdowns. The statistics above do not convey how many NPOs conduct mainly in-person events and how many NPOs had to greatly reduce their services as a result of these regulations. In their survey, the Independent Sector found over 71% of NPOs showed a large reduction in services and or available operations (Independent Sector, 2020). Many NPOs, which exclusively or primarily hosted in-person events, had a great financial burden put upon their shoulders with the pandemic forcing people to stay home, quarantine, and social distance.

In the article *Budget Planning: 5 Reasons Why Nonprofits Fail Financially & How To Avoid Them*, the National Executive Service Corps (NESC) stated that three of the five major reasons nonprofits fail were due to: organizations failing to plan for the long term, lack of revenue stream diversification, and being slow to respond to market changes that affect its financial strength (NESC, 2018). COVID-19 resulted in a drastic rise in all three of these issues simultaneously due to the shift in physical fundraising capabilities and government-mandated



shutdowns. With the world in dire need of NPO resources, fundraising needs to be reinvented and propelled past the edge of tradition, into the online universe.

Virtual Fundraising Opportunities

While the pandemic devastated NPOs' ability to fundraise, virtual events offered a ray of hope to struggling organizations. Given the dramatic impact of the COVID-19 pandemic on nonprofit funding, and NPO's reliance on in-person events to raise money and connect volunteers with their mission, it is essential that NPOs reinvent the way they fundraise now and in the future. A long-term shift in fundraising paradigm to include virtual events would allow NPOs to become more prosperous than ever before.

COVID-19 limited NPO fundraising options to virtual methods, forcing NPOs to rework their fundraising strategy. Traditionally, NPOs had been able to rely on a steady stream of revenue from events with a proven track record, but the pandemic rendered many of these events infeasible. Being virtual is the largest opportunity for any organization to diversify its revenue stream. To understand why diversification is vital to fundraising, the perspectives of all demographics need to be considered. For example, the formality of a large gala may draw the attention of older donors, but risks alienating a younger audience looking to get involved in the organization. Virtual events carry the possibility of connecting with previously underutilized demographics. These virtual events break convention, while raising millions of dollars, by appealing primarily to younger audiences, and show the potential for virtual fundraising to revolutionize not just how much money is raised, but where that money comes from.

Webinars are an example of virtual events that could be both prosperous and rewarding. Not only can NPOs get recognition for their missions, ideology, and good deeds done, but also bring in revenue. Webinars are a great way to gain sponsorships from organizations with the same values as a specific NPO. TED talks are a great example of this. TED is an organization that performs webinars for important research in Technology, Entertainment, and Design to help educate the world's population. The organization has said "more than \$10 million was granted to enlightened organizations such as the Acumen Fund, Environmental Defense, One World Health, and PATH" (TED, 2020, p. 3). From the article, *How to Do a Webinar Your Audience Will Love*



by Dan Shewan, a journalists and webinar specialist, we learned that webinars are successful when the right speakers are chosen. These could be community leaders, researchers, or other experts in their field. The NPO would donate to the expert for their expertise and charge supporters a small amount to access these webinars. Shewan explained that the organization hosting the webinar should make it clear the fees are put in place to support the organization's mission, and to consider offering more donation opportunities after the presentation for interested participants (Shewan, 2020).

Another example of an opportunity for a virtual fundraiser is a Virtual 5k. Virtual 5ks are inexpensive and efficient ways to raise funds for NPOs. All a participant needs is a registration/donation source and a way to provide proof of the run for possible prize opportunities. Virtual runs are highly profitable for fundraisers. For example, Molly Berlington, the owner of Blue Ridge Racing, had double the expected turnout on her first virtually held race, attracting over 750 participants when only 300 were expected (Petska, 2020). Another example of success in virtual racing is the White River Health System virtual 5k. This event had historically been an in-person, small fundraising event. However, because the COVID-19 pandemic made in-person races unsafe, the event went virtual. This did not stop the fundraiser from being successful. There were 133 participants, and it raised over \$11,000 for a local school's food pantries (White River Now, 2020). These events can also pitch college spirit against pandemic blues, such as at the University of Connecticut. The virtual UConn Health Half Marathon, 10k, and 5k races on June 4-7, 2020 were a huge success bringing in \$33,114 with more than 1,174 registered participants to support the UConn Health COVID-19 Rapid Response Fund (Woods, 2020).

Researchers from the Università della Svizzera Italiana studied how to improve the efficiency of smaller NPOs, specifically attempting to use online fundraising tools to improve efficiency (Nageswarakurukkal, 2020). Like our project, the study focused on smaller NPOs with minimal experience doing online fundraisers and was valuable to understanding the challenges specific to that situation. Ultimately, we gathered NPOs should focus on developing and strengthening their community of supporters by improving channels of communication, such as having lists of supporters' emails, and increasing the number of outlets for individual donations, such as a donation link on the organization's website. The study showed how a strong base of supporters can increase both the amount of donations, and the average donation per donor. This



was important as the study also found that online tools are especially effective at strengthening an organization's supporter base.

This is an optimal time for virtual revenue streams to be implemented and improved. Being unable to adapt is one of the main reasons NPOs fail, so a time when traditional methods are less effective, is a perfect opportunity to utilize technology and make progress towards a more modern revenue stream. Not only would this help NPOs' financial situations but modernizing most fundraising tactics would allow for more participants and progress towards the future. With the implementation of a virtual fundraising atmosphere, NPOs can adapt to reach not just their current volunteer/donor pool, but much more. While this time is certainly challenging, it is also an opportunity that should not be wasted. Virtual 5ks and webinars are only the beginning when it comes to the world of virtual fundraising; the world is quite literally at one's fingertips.

Habitat for Humanity

Habitat for Humanity International (HFHI) is a global NPO whose mission is to build homes, communities, and hope. They support eligible families through affordable housing, who in turn, will build strength, stability, and self-reliance by living in a safe and affordable home. Their vision is a world where everyone has a decent place to live. They believe in more than just supplying a home in partnership with the families; they provide an environment where families can be nurtured (HFHI, 2020). By living in a safe and stable home, children will be better educated and prepared for their futures. Importantly, their work is long-term. It offers a better future for families, not just a better present experience (HFHI, 2020). One negative effect of a lack of sustainable long-term housing is that it causes stress and a decrease in health. With an affordable home, families have more money left over to afford essentials such as healthy food, medicine, transportation and to save for their children's education. Habitat homeowners have more confidence in their ability to meet their own needs. Research shows that decent, stable housing provides more than just a roof over someone's head. Short and long-term benefits include: stability for families and children, sense of dignity and pride, health, physical safety, and security, and increase of educational and job prospects.



Habitat for Humanity MetroWest/Greater Worcester was the specific location we worked with during our project. This location has existed for 35 years, during which they built 50 homes and helped repair more than 30 houses in Worcester (HfH Worcester, 2019). This branch of Habitat has a couple of major fundraising events they rely on to generate the money they need, which includes a gala in the fall and their Women Build event in the spring (M. Pietrantonio, personal communication, November 9, 2020). Habitat for Humanity International is a global organization, so while the organization as a whole can implement policies and provide resources and support to affiliates, they cannot always meet each affiliate's specific needs as rules and regulations around affordable housing and the responses to COVID-19 are at a state by state, sometimes even town by town level (M. Pietrantonio, personal communication, November 9, 2020). Since not all of Habitat for Humanity International's resources worked for Habitat MetroWest/Greater Worcester, our project team researched and developed recommendations for virtual fundraisers that were financially efficient and easy to organize, in addition to recommending ideas for fun and engaging virtual volunteer opportunities that fit the Habitat for Humanity mission.

In our next section, we outline the different objectives we accomplished during the project. Additionally, we outline the methods we used to accomplish those goals and why they were the best tools to do so. For each objective, we used a variety of effective methods to ensure the data was from many perspectives and accurately reflected the information we needed for our project.



Methodology



Project Goal

The goal of this project was to create and recommend a comprehensive virtual fundraising strategy that helps Habitat for Humanity bridge the gap between traditional and online fundraising, including plans for efficient, engaging virtual events that fit the Habitat for Humanity theme and mission. To accomplish this, we developed four objectives that allowed us to complete the goal in an efficient and organized manner. These objectives each accomplished a different task that, when pieced together, resulted in the completion of the project. The research tools we used to successfully accomplish the objectives were interviews, internet research, and discussion boards. These tools allowed us to gather the needed information in an efficient and effective manner and are discussed in greater depth in the following subsections.

Objective 1: Research past fundraising events, both online and in-person, evaluate their outcomes, and determine the strengths and weaknesses of running them virtually.

The first step towards achieving our goal was to research past, successful fundraisers and determine the feasibility of converting previously in-person events into virtual events, as well as the strengths and weaknesses of fully online events. Online fundraisers have their own benefits and pitfalls and understanding this was critical to creating a successful online event. An important part of understanding the strengths and weaknesses of an event was to gain an understanding of the requirements of executing a fundraiser and how much revenue and participation it could generate. To get a thorough understanding of the requirements needed to execute a fundraiser, we looked at it from both a monetary investment and a time investment standpoint.

At the beginning of the project, we identified that to develop a comprehensive fundraising strategy, we needed to understand the current fundraising landscape. To do this, we conducted a wide range of interviews (Appendix A) with people and organizations that had



previously hosted virtual events. We reached out to 17 organizations for potential interviews and were able to conduct 8 interviews with individuals from the following organizations:

African Community Education
ALS Association
American Training Inc.
Girls on the Run Worcester County
Habitat for Humanity Lowell
Habitat for Humanity Springfield
Worcester Historical Museum
WPI Advancement

Having interviews allowed us to get accurate first-hand information on the time and monetary costs of the various events. Interviews were used to gain insight into information that may not have been documented, like the technology or software used. They also allowed us to obtain a better breakdown of the costs, so we could learn if any of the expenses that another group put into a fundraising method were unnecessary for Habitat for Humanity MetroWest/Greater Worcester. Using interviews was appropriate for this objective because we required an in-depth analysis of previous successes and failures when running events online, and the best way to do this was to look at examples of previous fundraisers.

Another method we used for this objective was online discussion boards. A particularly important aspect was getting viewpoints of people who already had experience with virtual fundraising. To accomplish this, we involved Habitat for Humanity employees who had participated in planning and executing various virtual events. To find these people we used a tool called Yammer, which is used for Habitat for Humanity employees and affiliates to communicate with each other internally. We asked these people questions regarding the steps they took when planning and executing their events, in addition to the aspects they think went right and aspects that could have gone better. This helped us understand what intangibles, such as donor enjoyment or sponsor publicity, we could realistically aim to recreate within a virtual fundraiser. Online discussion boards were a great method to use during the COVID-19 pandemic because of its ease in scheduling and lack of need for in-person meetings, eliminating any COVID-19 risks.



Since the discussion boards took place over an extended period of time, people could contribute whenever they had time. The biggest concern in using online discussion boards was the reduced participation due to the absence of structure and in-person meetings. We were only able to get a single response to the discussion board, even though it was seen and read by 133 people. To get more responses, the discussion board was posted again on a different forum within Yammer. This post was only viewed by 23 people and got no responses. This detracted from the effectiveness and usefulness of the discussion board overall, but the one response was very helpful, and we were able to incorporate the information gained from it into our deliverables.

Finally, to help supplement the information gathered through the interviews and discussion board, we conducted internet research. This method was particularly useful for learning the costs of fundraising tools and platforms, in addition to generating ideas of potential events that could be recommended to Habitat MetroWest/Greater Worcester. Software is usually obtained through the company or creator's websites. As such, these sites could be used to gain a full understanding of the costs and capabilities of any piece of software. This allowed us to determine if there were cheaper tools or platforms that had similar or better capabilities than the ones initially recommended to us. Through internet research we were also able to read articles that had been published by or about organizations that had held virtual fundraisers. Through these articles we were able to gather the information and data we needed and get leads for organizations to contact for interviews.

The culmination of this objective came as a framework for evaluating the merit of converting an in-person event to a virtual format, as well as understanding the benefits and pitfalls of running events completely online. The core of this framework was evaluating the strengths and weaknesses of online fundraising and understanding how those strengths and weaknesses applied to potential virtual events. For example, what was lost when converting a traditional event into an online format, and was it an area the event can afford to lose? Conversely, how did an event benefit from the strengths of going virtual? This framework helped Habitat MetroWest/Greater Worcester's event organizers to better understand how to design an event in a way that plays to the strengths of virtual fundraising. This allowed us to put together a list of feasible fundraisers to recommend to Habitat for Humanity MetroWest/Greater Worcester.



Objective 2: Gain an understanding of Habitat for Humanity's fundraising culture, their fundraising needs, and their past fundraisers.

Our second objective for this project was to understand the fundraising culture at Habitat MetroWest/Greater Worcester, their fundraising needs, and their past fundraisers. Gathering this information allowed us to tailor potential recommendations and the tools we developed to the organization. This made the development team more comfortable with the new virtual format of the event, making the transition as seamless as possible and reduced the required learning curve. Additionally, by determining Habitat MetroWest/Greater Worcester's fundraising needs, we ensured the size, type, and efficiency of our recommendations met these needs. Finally, understanding their past fundraisers was essential to the research in the first two parts of this objective. For this objective, we researched all of Habitat MetroWest/Great Worcester's fundraisers. This research builds off the information gathered in objective 1, with a greater emphasis on understanding the decision-making process specific to this branch of Habitat for Humanity and allowed us to determine what types of fundraisers were the best recommendations and how to make our tools as useful as possible.

The first way we gathered this information is through interviews (Appendix A). We interviewed the three members of the development team and the volunteer manager from Habitat MetroWest/Greater Worcester. The roles held by the members of the development team are as follows: Marketing Programs Manager, Director of Development, and Development and Grants Officer. By interviewing these employees, we gained a fundamental understanding of Habitat MetroWest/Greater Worcester's fundraising culture and what the organization wanted that culture to be. Interviewing the employees was the most efficient way to determine the organization's fundraising needs and their past fundraisers, due to their experience within the organization. Additionally, we met with them multiple times throughout the project and shared the work we were doing to get feedback and ensure it would be as useful and helpful as possible.

Finally, we utilized internet research to compose an independent assessment of the organization's culture, fundraising needs, and past fundraisers. Habitat MetroWest/Greater Worcester already had a large volume of resources both detailing their fundraising goals and



needs and evaluating past fundraisers. In addition to sources from Habitat MetroWest/Greater Worcester, we researched outside sources to gather additional information on the matter. These sources helped to ensure the information from the interviews was an accurate reflection of the culture, fundraising needs, and past fundraisers.

By studying the information gathered from these different resources, our team developed an understanding of what the organization was looking to get from us during the project. This understanding was used to ensure our recommendations and tools met the requirements and expectations laid out by our sponsor. Understanding the needs of the organization allowed us to correctly position Habitat MetroWest/Greater Worcester for immediate and future success.

Objective 3: Research how fundraisers are analyzed/measured and use this information to analyze the effectiveness of potential fundraisers.

During our project, we needed to establish the metrics that we used to evaluate fundraisers. Originally, our plan was to research and evaluate which metrics were most important and how having events virtually might change these metrics from standard fundraisers. However, this became less relevant as we talked to our sponsors.

Throughout the project, we had several meetings with our sponsors. These were what informed most of our decisions regarding the metrics. Our sponsors made it clear that they wanted as many events and as much information as possible. That meant that our metrics should not be used to judge fundraisers. Rather, we should determine where the fundraiser stands within each metric, and then include the fundraiser even if it does poorly when graded by these metrics. We used this to establish our Fundraising Comparison and Decision Tool. In this spreadsheet, we listed each event we researched, and how well it did in a multitude of metrics.

The five metrics we used when creating the spreadsheet were determined through sponsor meetings with Habitat for Humanity MetroWest/Greater Worcester. The first three were what is required to be able to organize and execute a virtual fundraising event. These metrics were the lead time (the amount of time needed between starting to plan the event and the running of the



event), the number of staff required to plan the event, and the money required to execute the event. The final two metrics were used to evaluate the outcome of an event. These metrics were the net profit and the engagement (the amount of people expected to participate in an event). Using the advice of our sponsors, we graded events within these five metrics, not using exact numbers, but rather ranges, to account for variability of events based on uncontrollable variables. When making the Playbook, we expanded upon the criteria that we gained in this step and detailed how we arrived at our conclusions.

Objective 4: Develop recommendations of effective virtual volunteer events and creating an action plan to increase the virtual presence and revenue stream for Habitat for Humanity.

The fourth and final objective for our project revolved around consolidating the data gathered from the previous objectives into actionable insight. Using the information from the previous objectives, we created an effective “Virtual Event Playbook” for Habitat MetroWest/Greater Worcester that examined and described twenty of the most effective virtual methods to raise money, engage the community, and increase presence online. The Playbook gave an in-depth understanding of each event from a project description, to critical steps, to key budget items, and time considerations. This will help Habitat MetroWest/Greater Worcester navigate the challenges presented by COVID-19, revitalize their organizational fundraising, and enter the future with a plan built for success.



Results and Analysis



Through our interviews, discussion board, and internet research we were able to identify many common findings that people formed after holding their virtual event(s). Many of these findings were brought up unprompted by our team, the people we spoke with said it of their own accord, largely due to the importance of the ideas and being the main takeaways from the event. However, these ideas were not recognized until we were able to compare all our notes from the various interviews and perform content analysis to identify the common themes and ideas. Due to the recurring nature of these ideas, we were sure to note them and investigate why these ideas were so important. These findings and rationales of their importance are as follows:

Be creative. This was by far the most common idea we encountered during our data collection period, and it was mentioned in most of our interviews. It was especially emphasized during our interview with American Training Inc, who impressed upon us that there is a need for people to “work outside the box” during this unprecedented time. As a result of Covid-19, many of the memorable and enjoyable aspects of in-person events are lost, so new and creative solutions need to be reached to replace them. Often this means completely reworking an event that had been run in a similar way for years to make it stand out as an online event. There are minimal resources to use as a guide, so the success of these virtual events will fall to the ingenuity and creativity of the staff organizing them.

Temper your expectations of the event. This idea was mentioned in four of our eight interviews, with the best example coming from our interview with the Habitat for Humanity Springfield branch. In the interview they emphasized that they were most pleasantly surprised by the outcome of events that they went into with no expectations. There is a learning curve to hosting virtual events, so the first few times they are run will probably not meet lofty expectations. However, due to the reduced costs associated with many virtual events, failure is not as great a setback for a virtual event as it is with their in-person counterparts. The potential for success is there and is achievable.

Be prepared - Have backup plans - Practice often. When people are learning a wide range of online software and tools for the first time, there are many things that can go wrong. The best way to mitigate these effects is to be prepared by practicing using the software as much as possible and by having backup plans ready in case a problem arises during an event. Being



prepared for technical failure can help make the event a better experience for the participants and make it more successful. In our interviews, many organizations experienced some type of technical problem during their event that detracted from its success. The most successful organizations, however, had a backup plan to proceed with, either to buy time to fix the technical problem or maintain a smooth flow of the event.

Marketing and Advertising are vital. This is an area in which the strengths of online fundraising stand out. Because the barrier to entry for these events is often much lower than with traditional events, publicizing an event has a much greater potential to attract a new audience. Events need to be advertised well in advance to give people plenty of time to be made aware of the event and to make plans to attend. Liberal and effective use of social media has proven a particularly inexpensive and effective way of getting the word out. Last minute reminders of the event are also helpful, as last second distractions in their home or workplace could cause people to forget about the event and miss it. As mentioned during our interview with Girls on the Run Worcester County, social media was very important to the success of their event as the various platforms allowed them to reach a wide base of people with their event promotion efforts.

Use others' expertise to your advantage. This idea was mentioned in a couple of our interviews, both African Community Education and the Worcester Historical Museum discussed how they paid for professional services for their events, and it helped to make their events more successful. The Worcester Historical Museum even said, “it was the best money they ever spent”. As stated before, many people are learning these tools and software for the first time, but there are also people who have been using them for years and are experts at using them. Partnering with organizations experienced in using unfamiliar tools is a great way to save valuable time. Conversely, this expertise comes at a cost, so a cost benefit analysis needs to be performed to determine if the additional success of the event is worth the additional cost associated with it.

Based on all the information gathered, our team found fundraising through a virtual format is not only possible, but can broaden the horizons of NPOs in terms of demographics reached, fundraiser accessibility, etc. By being online, NPOs can reduce the expenses and/or the time it takes to set up in-person events. In a virtual format, NPOs can reach populations outside



of their physical location. For example, the Springfield, MA, Habitat for Humanity branch stated even people from as far away as Colorado were able to attend their virtual auction. We were sure to include these common ideas in the deliverables we gave to our sponsor, along with a breakdown of why they are important, because we believe these are many of the keys needed to run a successful event. The ability to learn these ideas, without having to go through the growing pains usually associated with learning them, will give Habitat MetroWest/Greater Worcester a good starting point for their virtual events and allow them to be as successful as possible.

All the research we did, and all the results we obtained, ultimately had the goal of creating our deliverables for Habitat for Humanity MetroWest/Greater Worcester. Our first deliverable was the Fundraising Comparison and Decision Tool. The purpose of the comparison sheet was to compile all the information we had collected about virtual fundraising into a single document that made it easy to compare the strengths and weaknesses of various fundraisers at a glance. This sheet was designed to be the first resource the development team would look at when planning upcoming events and would be used to quickly determine which events it would be most productive to investigate further. For example, if the Habitat development team wanted to put on a fundraiser that would be engaging to existing volunteers and that they could put on in a short period of time and for a low budget, the comparison sheet is able to direct them to a select few events matching that description. The details of those events, such as budget estimates and planning resources, are stored in the Playbook, and the comparison sheet allows users to quickly navigate to the section in the Playbook where a relevant event is discussed.

The comparison sheet works by grouping all the events we researched into categories based on their desired outcomes, then assigning scores to each event in five categories (lead time, staffing, finances required, net profit, and volunteer/donor engagement) that Habitat communicated would be relevant information to them. Every event is given a rating of “strong”, “moderate”, or “weak” in each category to quickly convey the strengths and weaknesses of each event. These ratings are based on the objective data gathered in the research process, and are color coded to make them stand out. Additionally, the spreadsheet can be sorted by each category so the development team can quickly see which events had, for example, a short lead time or a high net profit. The events are also grouped into one of three categories by desired outcomes. This was done because Habitat communicated to us that they wanted information on



events that served a variety of purposes, and the categories were determined based on the broad goals Habitat wanted to reach with their events. The outcomes we decided to group the events into were events designed to keep existing volunteers engaged with the organization, events designed to reach a new audience and inform people about the organization, and events designed to bring in a high amount of donations. We also included a category for tools or events designed to function as part of a larger event to increase donations. Throughout our research we were able to gather information on a wide variety of different events, and through our Fundraising Comparison and Decision Tool we were able to organize that information in a way that made it useful to Habitat.

Our second deliverable is the Playbook. The Playbook provides relevant details on all of the events we researched. While it does not tell our sponsors exactly how to run each event we researched, it does give them a starting point. Alongside the basic descriptions and the goals of the event, it also contains the event's variations (if any variations exist), what to pay attention to in terms of both time and money, the steps needed to run the event, any tools that may be useful to run the event, and any leads that we had found.

One of the first things that we noted as we were coming up with the list of events to put into the Playbook was that some events had several similarities. One example was the game night, the bingo night, and the monopoly night. At their core, these events were all rather similar events where donors got together to interact over a fun activity and the event raised money through charged admission (Barnett 2019). Costs for all these events would traditionally be merely the game and any snacks/drinks, as well as possibly the venue (Better Fundraising Ideas n.d.). With the events now being virtual, costs for these events are simply the software used to play the game, as drinks and snacks cannot be provided virtually, and no venue is necessary as everybody is playing from the safety of their own homes (Cody 2021). With all these similarities, it would not be right to call these different events, as they were all the same event, using a different activity. As such, we called them all “game nights”, and everything else was simply a game option or a sub-event.

The game night events were not the only area where we were able to group similar events together. One such category is creative nights, where participants each make something as a



group, guided by some group instructor or leader. These include craft nights, cooking nights, and the making of teddy bears for the children of veterans. Similarly, long-term fundraisers is the name that we gave to the group of inexpensive fundraisers where donors are encouraged to donate small amounts over long periods of time and do not require attendance at an event. These include a round-up campaign or a donation contest. We also grouped speaker-based events, where donors watch live as somebody gives a speech or presentation related to the NPO's mission including zoom-a-thons, webinars, and guest speakers.

Another thing we determined was researching the available tools could be just as important as learning about the fundraising methods themselves. A large part of this stems from how the cost of virtual events is influenced by the price of the software, platform, or tool being used. For example, the round-up campaign's pricing is dependent entirely on the software being used. In a discussion with our sponsor, Molly Pietrantonio informed us that Habitat for Humanity had previously considered a round-up campaign, but never followed through because they were not certain that the cost of the software would be worth it. However, we were able to find a round-up campaign with no upfront cost that charges the organization by taking a share of the profits (RoundUp App, n.d.). Throughout our research, software could generally fall into one of two categories. The first is software that would be useful for just one event, such as round-up campaigns being the only event to use round-up campaign apps. The other category is a tool that would be useful in numerous circumstances. The two major tools that we discovered in this category were Zoom (used to allow for large group meetings) and Classy (used as an easy way to create donation or fundraising web pages to collect donations online).

In addition to the tools needed to run events and the basic information of the events themselves, we also put any tips we discovered into the Playbook. These tips are pieces of information meant to enhance the outcome of any event. For example, in our interview with Tim O'Neil from African Community Education, he told us that when getting a guest speaker for a virtual event, one can consider looking for a guest speaker that may normally be too expensive because the speaker can participate virtually and the organization will not have to pay travel expenses. Another example came from our research on Karaoke Nights, where one source mentioned that when using Watch2Gether (a free software for the communal use of Karaoke music), the event would run smoother if the organizer had a list of the songs that each participant



intended to perform. This allows for fewer breaks between the music, helping the virtual event to feel more authentic (Coates 2020). These tips help to maximize what the event can do and are not necessarily something a first-time organizer events would know.



Recommendations



The purpose of this project was to develop tools that will assist Habitat for Humanity MetroWest/Greater Worcester with their virtual events during the COVID-19 pandemic. To accomplish this, our team created the previously mentioned Fundraising Comparison and Decision Tool and Playbook. While we created these tools, our sponsor will need to continue to add to and maintain them for them to remain relevant and useful to their fundraising efforts. The main idea behind these two tools was for them to be living, breathing documents. The tools are meant to be added to, edited, and built upon. With that in mind, we strove to make this as simple as possible for our sponsor.

For the Fundraising Comparison and Decision Tool, this was made to be as easy as adding a new row to the spreadsheet. For the tool to work properly, the new event row needs to be added below the first/top event and above the last/bottom event. When a new row is inserted into the spreadsheet following this rule the general formatting will be applied to it. The event needs to be inserted into the proper grouping for the grouping formatting to apply, but all other formatting such as the column sizes, the cell borders, word fonts, and event evaluation coloring is automatically applied. We included conditional formatting, so the color coding we used is automatically applied to the evaluation section of each event, depending on the ranking of the event for each category. The filter function will automatically include this new cell into the filter process, so anytime the tool is sorted using the filter the desired sorting will occur. Similar efforts were made in the Playbook.

In the Playbook, we included an appendix with the templates we used to fill out each event page and the software/tools we had more information on. These templates make adding a new full page to the Playbook easy and allows for the formatting for each page the same. Additionally, we included a brainstorming section where ideas that have not been fully researched and/or developed can be put until the necessary information can be added and the idea can get a full and complete page in its proper section. The organization of the Playbook is broken down by event grouping, which is the same as in the Fundraising Comparison and Decision Tool, to make adding any new events into a logical and easy to locate place easy. The table of contents is easy to update, the user simply clicks on it and then the “update” button, so new pages to the Playbook can be added and linked into the table of contents.



We believe, with the proper upkeep and expansion, these tools will be useful long into the future, even after the pandemic ends. This will help Habitat for Humanity MetroWest/Greater Worcester have sustainability in their fundraising efforts, even with staff turnover and any other personnel changes to their organization. Our team recommends that Habitat for Humanity MetroWest/Greater Worcester keeps updating these deliverables as they are living, breathing documents. Our team also recommends that this branch of Habitat should share these deliverables - maybe even make them their own My.Habitat tab - with the rest of the Habitat for Humanity community so others can add and gain from this project as time progresses.



Conclusions



COVID-19 has taken the world by storm and dramatically reshaped the world of nonprofit fundraising. This change has been sudden and difficult to manage for NPOs across the world but brings with it new opportunities. Based on the information we collected, our team has concluded that fundraising through a virtual or hybrid format is not only possible but can broaden the horizons of NPOs in terms of demographics reached and fundraiser accessibility, while costing less than in-person events. By reducing their barrier to entry, virtual fundraisers allow NPOs to reach populations outside of their physical location, spreading awareness and increasing potential donor base.

By creating an innovative virtual Fundraising Comparison and Decision Tool and Playbook to help guide Habitat MetroWest/Greater Worcester, we gained new insight into the fundraising culture cultivated by the COVID-19 pandemic. To survive in a pandemic, fundraising professionals must think outside the box, using marketing and advertising to their advantage, having back up plans, and when necessary partnering with professional services to enhance the virtual/hybrid experience.

While the COVID-19 pandemic has severely harmed the NPO industry, we believe that the lessons learned, and tools acquired over the course of this difficult time will allow NPOs to move into the future stronger than ever. Virtual fundraisers will remain as potent tools for NPO well past the point where traditional fundraisers are once again possible, and we believe we have given Habitat MetroWest/Greater Worcester an effective set of tools for not only navigating the challenges presented by the pandemic, but for expanding their fundraising capabilities well into the future.



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