

NONPROFIT ENTERPRISE MANAGEMENT

STRATEGIC PLANNING FOR ADVERSE SCENARIOS

The novel coronavirus (COVID-19) is affecting travel, commerce, and countless other variables worldwide. Nonprofit organizations will likely also feel the impact — whether through new challenges in fundraising efforts, portfolio volatility from market fluctuations, or being called upon to help affected communities. At times like this, it is increasingly important to explore and implement best practices for financial, risk, and operational management. PNC Institutional Asset Management® brings our clients ideas to help your organization to navigate these troubling times and deliver on your mission.

STRATEGIC PLANNING FOR MISSION SUCCESS

Consider discussing the following at an upcoming board meeting. Your PNC advisor would welcome the opportunity to participate.

PRIORITIZE EFFORTS BY EFFICACY

- Create or review the scorecard for each area of operation. How is each activity contributing to the success of your mission? Are there activities that should be accelerated or eliminated?

CAUTION WITH MAJOR CAPITAL INVESTMENTS

- Does your 5-year budget projection give you flexibility to handle uncertain markets?
- Have you stress tested your budget for a market correction or a major fundraising drought?

INCREASE FUNDRAISING EFFORTS, NOW

- Have you changed your communication plan around planned giving as a result of logistical challenges from the coronavirus?
- How can you replace in-person fundraising events if necessary?

EVALUATE SPENDING/DISTRIBUTION POLICY

- Does your spending policy provide enough flexibility to navigate in volatile markets?
- What other financial resources or partners can you leverage outside of your investment program to support your mission?

STRESS TEST OPERATING BUDGET SOURCES

- How will each of your funding sources be affected by an adverse market or economic scenario?
- How would you compensate for a budget shortfall from an adverse scenario?

INVESTMENT PORTFOLIO POSITIONING: THINK DEFENSIVELY

- How sensitive is your investment program to a market drawdown?
- What steps have you taken to minimize risk in your investment portfolio against your return objectives?

LET'S INVEST IN THE SUCCESS OF YOUR MISSION

At PNC Institutional Asset Management, we are ready to help our nonprofit clients address the tough questions raised as part of the strategic planning process. Adverse scenarios, such as a novel virus or general market volatility, are going to occur. Strategic planning can help to reduce the impact that such scenarios have on your organization's mission. Toward this end, we have invested in specialized resources, human capital, and technology to help nonprofit organizations solve their unique challenges. We help our clients to better manage assets, fundraising, and their operations by providing:

ASSET MANAGEMENT & MORE

- Outsourced chief investment officer (OCIO) solutions to manage a volatile investment landscape
- Customized fixed income, liquidity, and cash management solutions to manage a rapidly evolving interest rate environment
- Custody and safekeeping of assets, which can be "bundled" with investment management services for further ease of administration
- Subaccounting services to manage multiple pools of assets, saving your in-house staff time and avoiding the risks of recordkeeping via spreadsheet
- Access to I-Hub, a secure, online tool that provides 24-7 access to account information and market values
- Traditional banking solutions

PHILANTHROPIC SERVICES

- Dedicated planned giving team to manage the investment and administrative needs of your program
- Ongoing education designed to help board members and fundraisers increase their effectiveness at donor engagement and overall fundraising
- Responsible investing solutions that help to align the portfolio with your mission and attract donors with similar objectives
- Specialized payment services, including ACH (direct deposit), to help support the administrative side of your planned giving program
- Discretionary grant-making and scholarship administration services¹
- Donor Advised Fund services



READY TO HELP

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¹ These services are incidental to trustee services and not offered as stand-alone services.

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