

# Elevating Fundraising

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**CCS**  
FUNDRAISING

# CCS Presenters



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# About CCS

75+ Years  
Experience

Global Partnerships  
With a Regional Perspective



Leading experts in campaign  
and development strategy

700+ Partnerships  
Annually

Fundraising  
Expertise



Experienced across nonprofit  
sectors and locations

Deep  
Experience

90% Repeat or  
Referrals



Full-time professional staff  
plans, implements, and  
manages fundraising projects

525+ Professional  
Staff

Partners with Nonprofits for  
Transformational Change

# Today's Discussion

- 1 Four Key Pillars in Fundraising
- 2 Top Five Challenges
- 3 Suggested Strategies & Tactics
- 4 Applicable Takeaways

**What are the critical fundamentals in fundraising and what strategies might you employ to minimize common pain points?**



# Four Key Pillars In Fundraising

# The Four Pillars of Fundraising



## CASE

Rational behind the initiative - the “why”



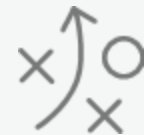
## LEADERSHIP

Those who advocate for the cause



## PROSPECTS

Organization’s natural constituency

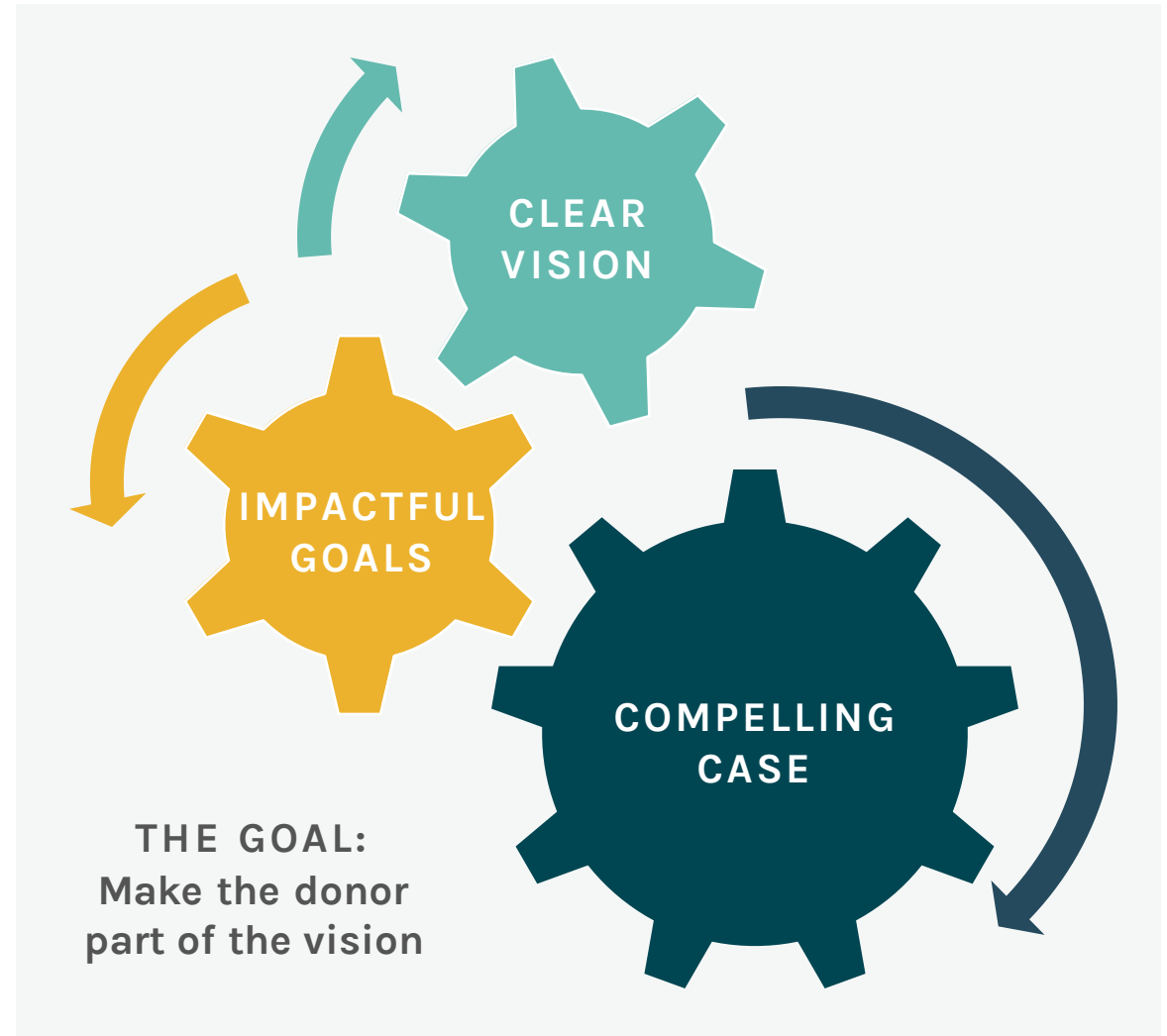


## PLAN

Personal approach, strategy, emphasis on major gifts.



# 1 The Case for Support: Inspiring Giving



## 2 Leadership: Those Who Champion for the Cause

### ADVOCATE

Express confidence

### ATTENDEE

Participate in meetings and events

### STEWARD

Connect and stay engaged  
with donors

### EXPERT

Have up-to-date knowledge on  
organization and issues

### DONOR

Contribute appropriate financial  
investment

### SOLICITOR

“Join me”

*81% of high-net-worth individuals cite peer to peer asks as a major factor in giving*



# 3 Prospective Donors: Who Should You Prioritize?

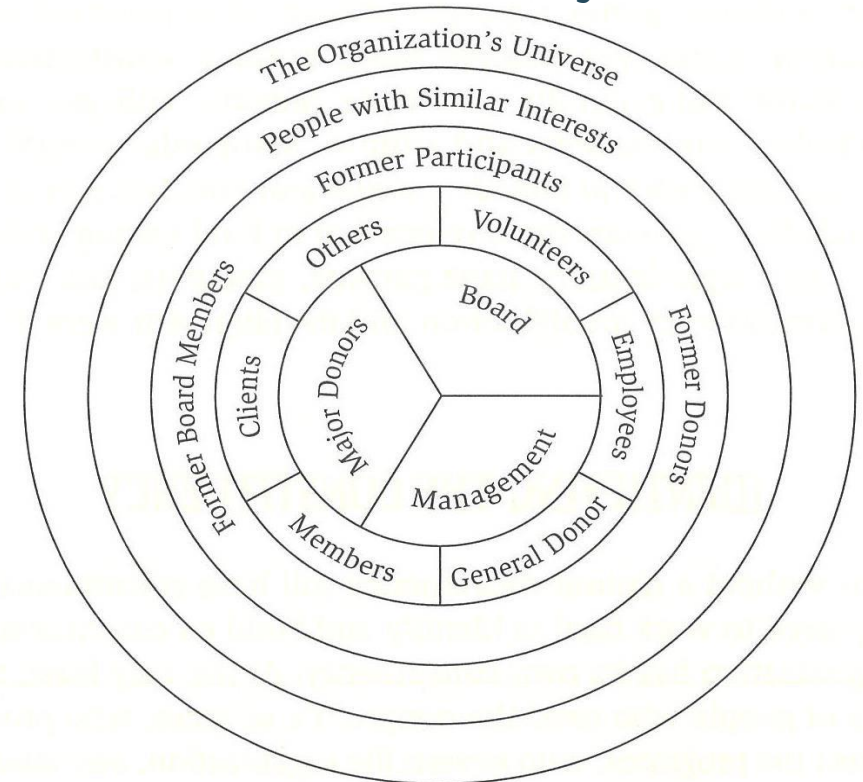
## “TOP -> DOWN”

- Best prospects first
- Largest donors first
- Best donors by constituency

## “INSIDE -> OUT”

- Closest friends first
- Membership
- Past donors/members
- General public

## The Constituency Model

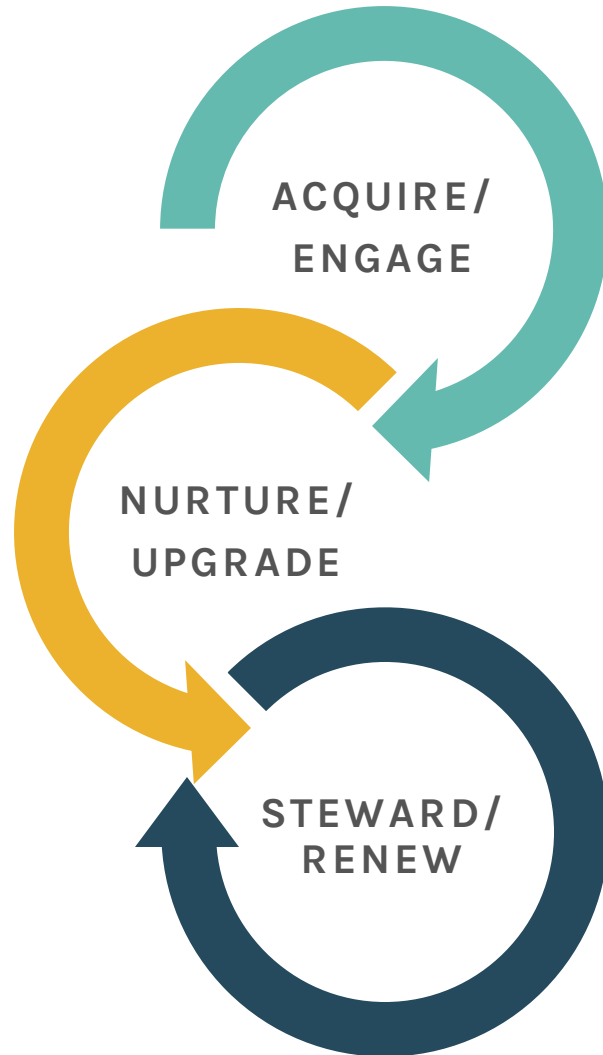


Source: *Achieving Excellence in Fund Raising* – Hank Rosso

**PEOPLE GIVE BECAUSE  
THEY ARE ASKED**

**62%**  
of wealthy individuals cite “being asked” as their primary reason for giving

## 4 Donors: Building Relationships



- Bring new donors to your donor base or re-engage lapsed donors
- Maintaining existing donors is more cost effective than acquiring new donors

- Secure gifts from existing donors
- Helps to stabilize your donor base

- Increase gift amounts from existing donors
- Moves donors through the donor lifecycle

# 4 The Fundraising Plan

✓ Preparatory activity

✓ Goals

✓ Timeline

✓ Donor audiences

✓ Major gifts strategy

✓ Case for support

✓ Communications strategy

✓ Gift recognition

✓ Budget

✓ Resources

✓ Key strategies

✓ Leadership



# Top Five Challenges

# Audience Poll

## What keeps you up at night?

- A. A thin prospect pipeline or one without significant capacity
- B. Donors who are not continuing their support year-over-year or are not making multi-year gifts
- C. Lack of adequate staff and retention of team members
- D. Leveraging data to make better decisions
- E. All of the above

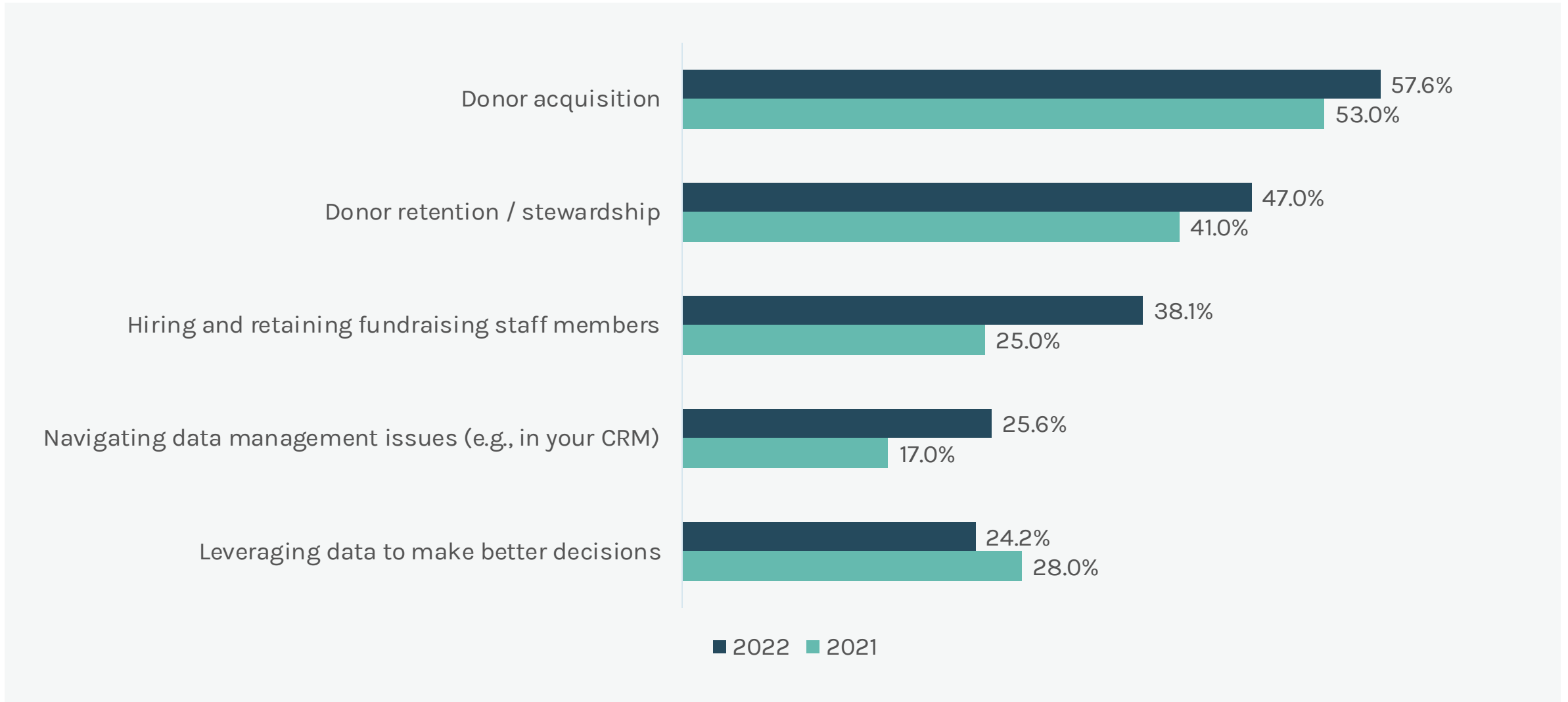
# CCS 2023 Philanthropy Pulse Report

The 2023 CCS Philanthropy Pulse report provides a window into the fundraising practices of nearly 1,200 organizations across nonprofit sectors based on data collected in late 2022.

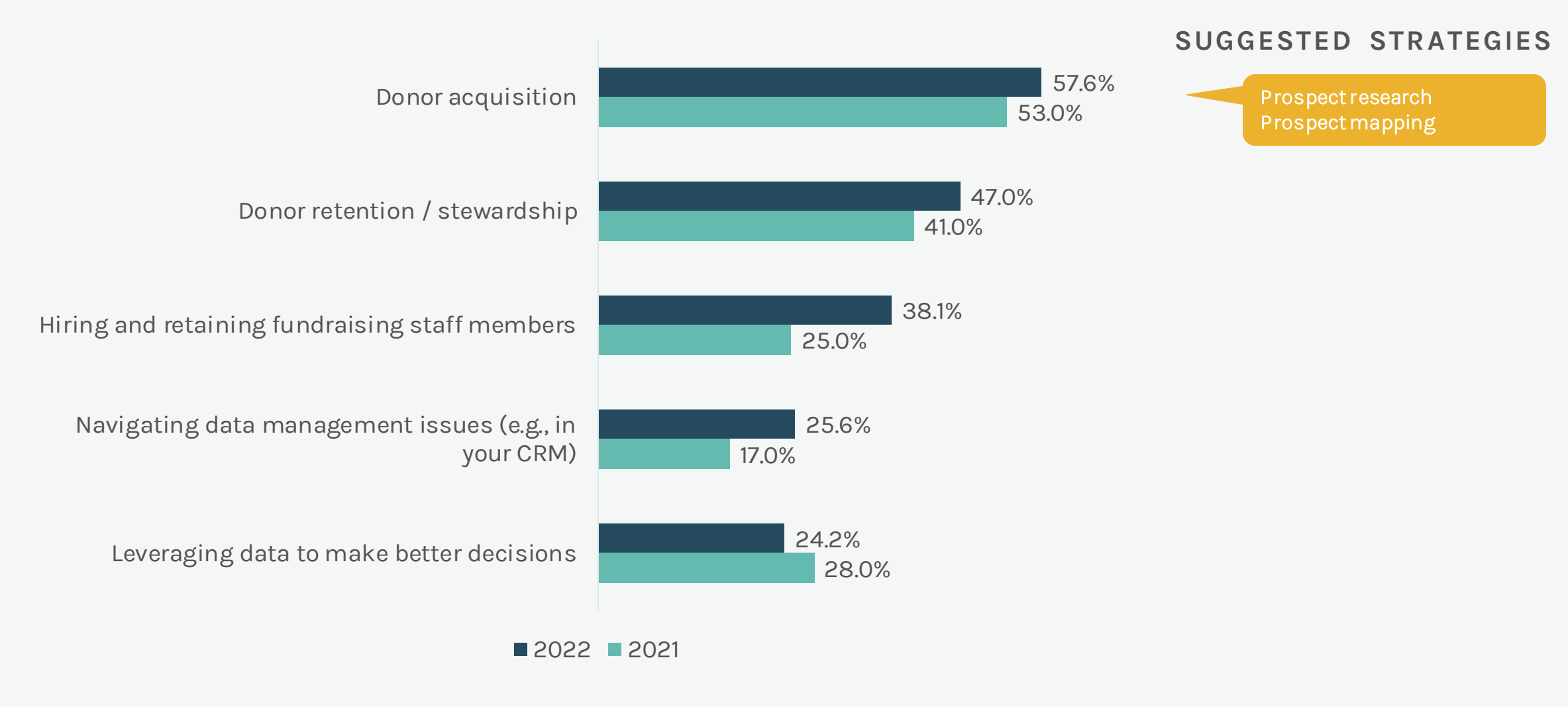
**DOWNLOAD HERE**



# Top Five Fundraising Challenges

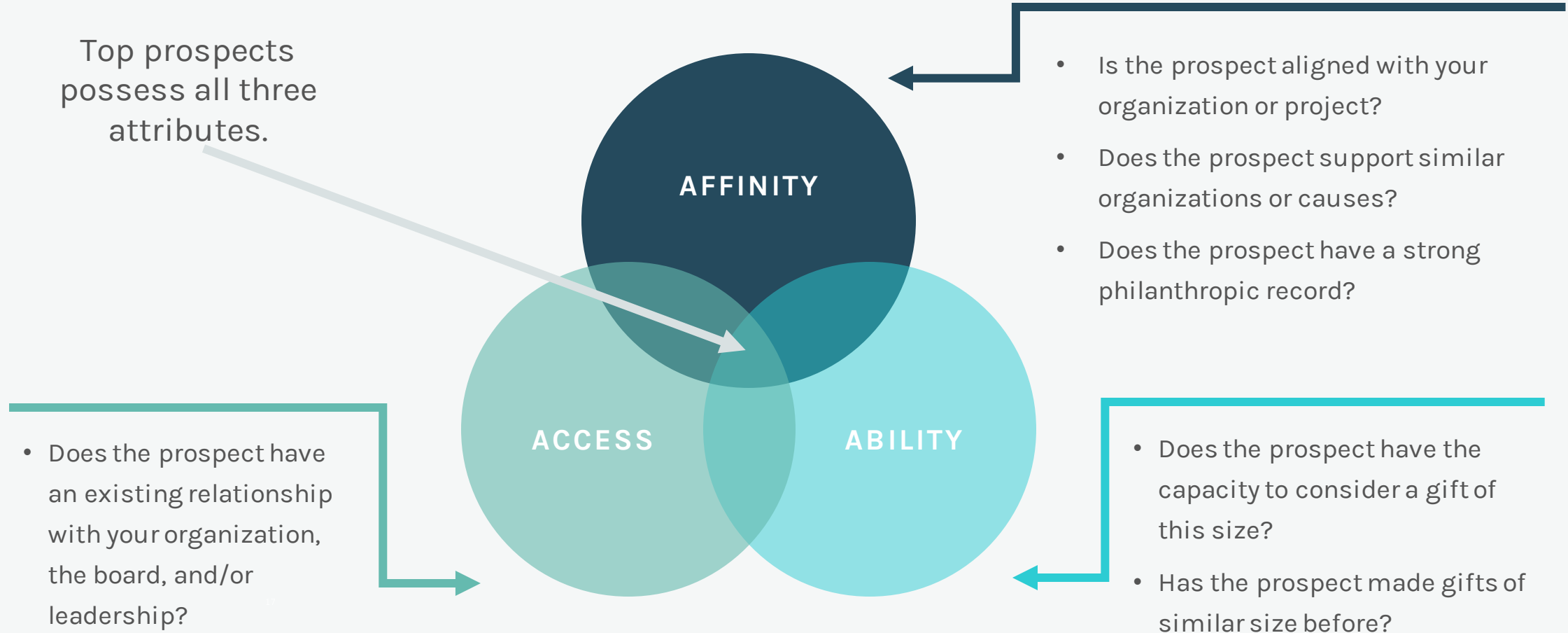


# Fundraising Challenges & Solutions





# Identifying Potential Donors



# The 10-Minute Prospect Profile

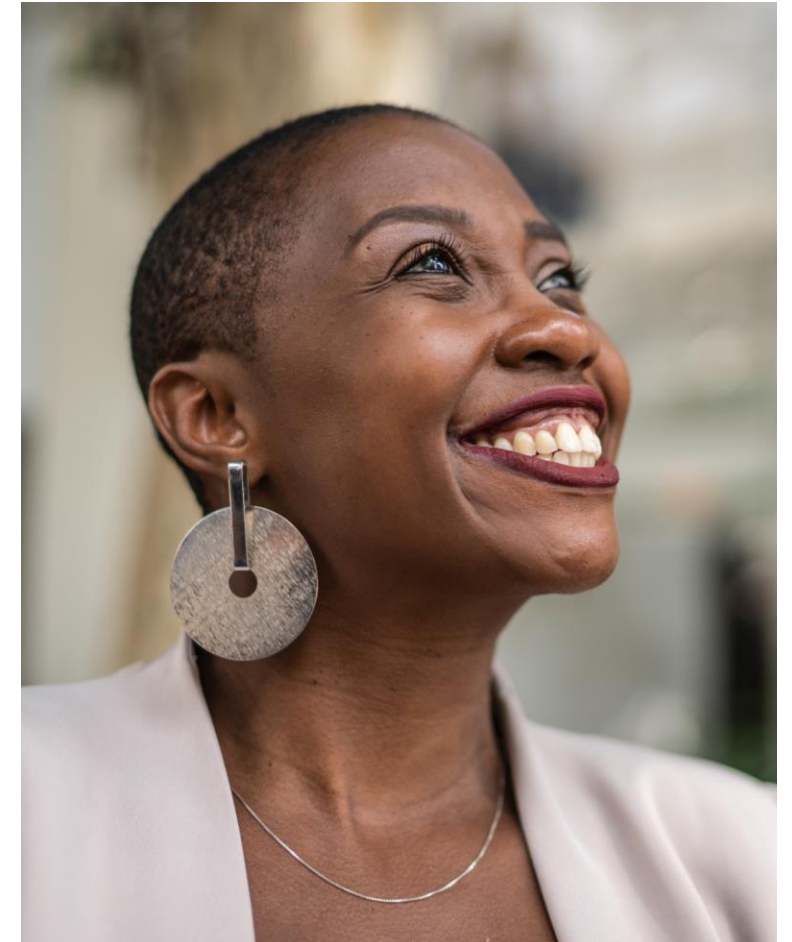
There are several factors that should be considered when understanding someone's ability to make a gift.

1. SOURCE OF WEALTH & NET WORTH

2. PROFESSIONAL AFFILIATION

3. GIVING TO YOUR ORGANIZATION

4. GIVING TO PEER ORGANIZATIONS



# Prospect Research Resources

Prospect research will illuminate critical pieces of information that will help fundraisers develop a focused philanthropic strategy.

## FREE RESOURCES

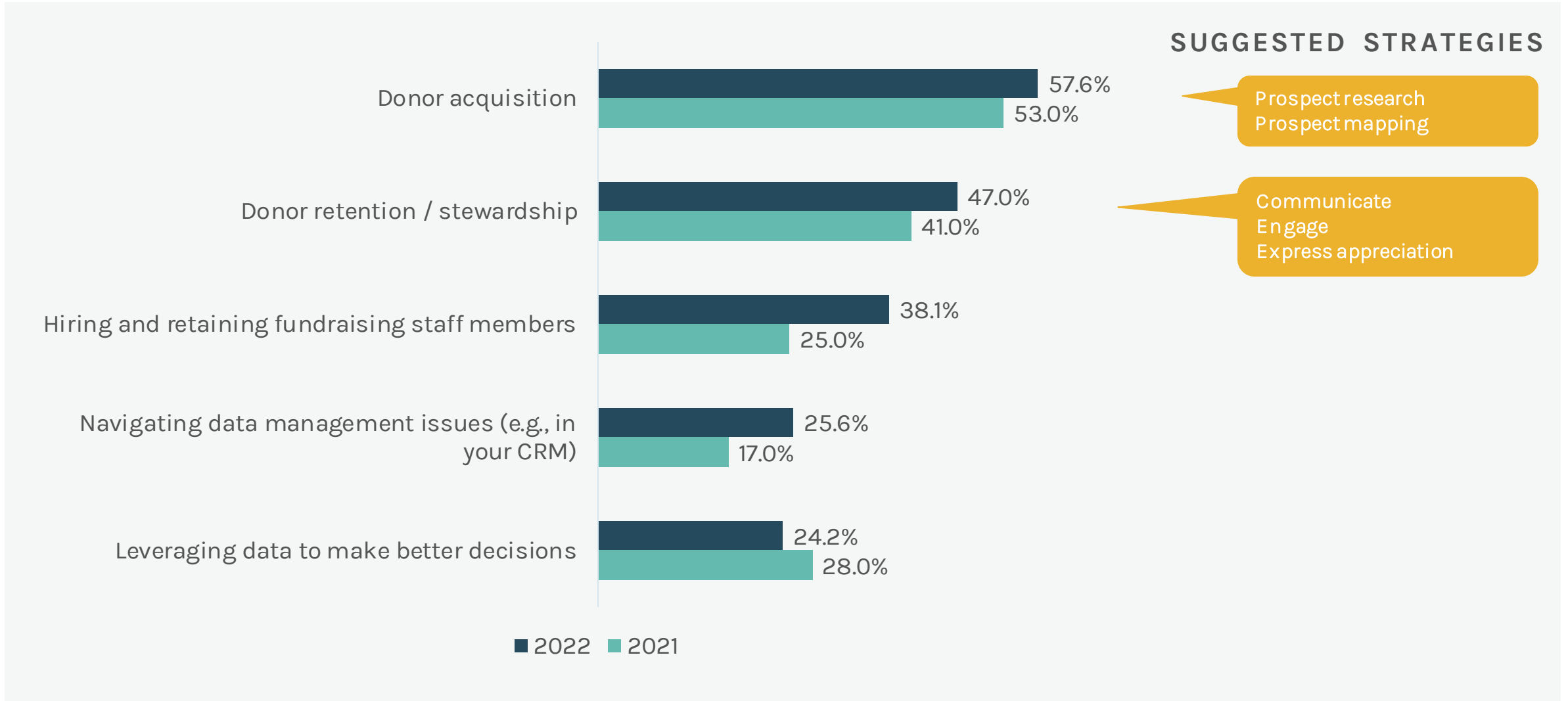
- Google
- Corporate Bio
- Nonprofit Website (i.e., board member bio)
- Nonprofit Marketing Materials (i.e., annual report, donor lists)
- Guide Star (for Foundation 990s)

## PAID RESOURCES

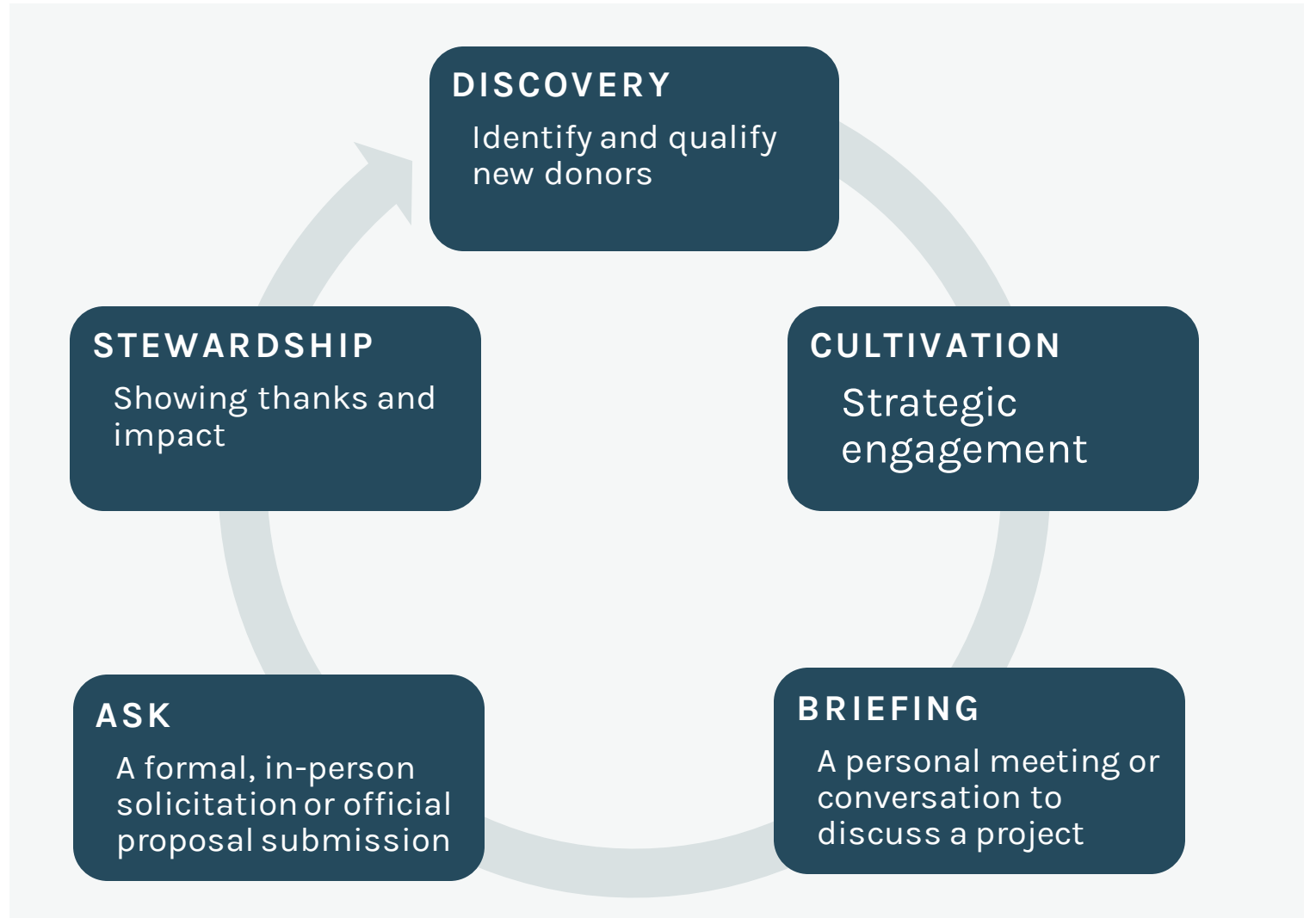
- News/Media Outlets (*The Chronicle of Philanthropy, Inside Philanthropy*)
- Database (*WealthEngine, NOZA, WealthX*)

**\* REMINDER \***  
**Don't rely solely on wealth ratings!**

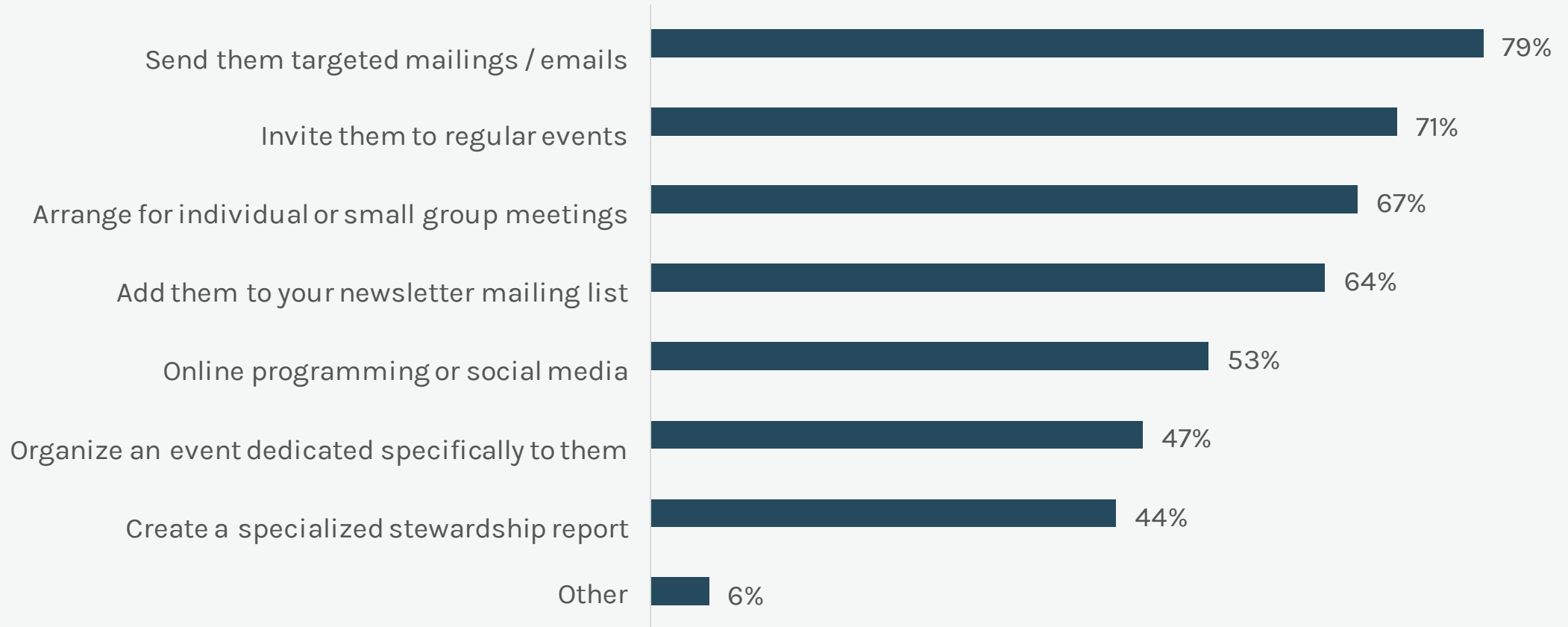
# Fundraising Challenges & Solutions



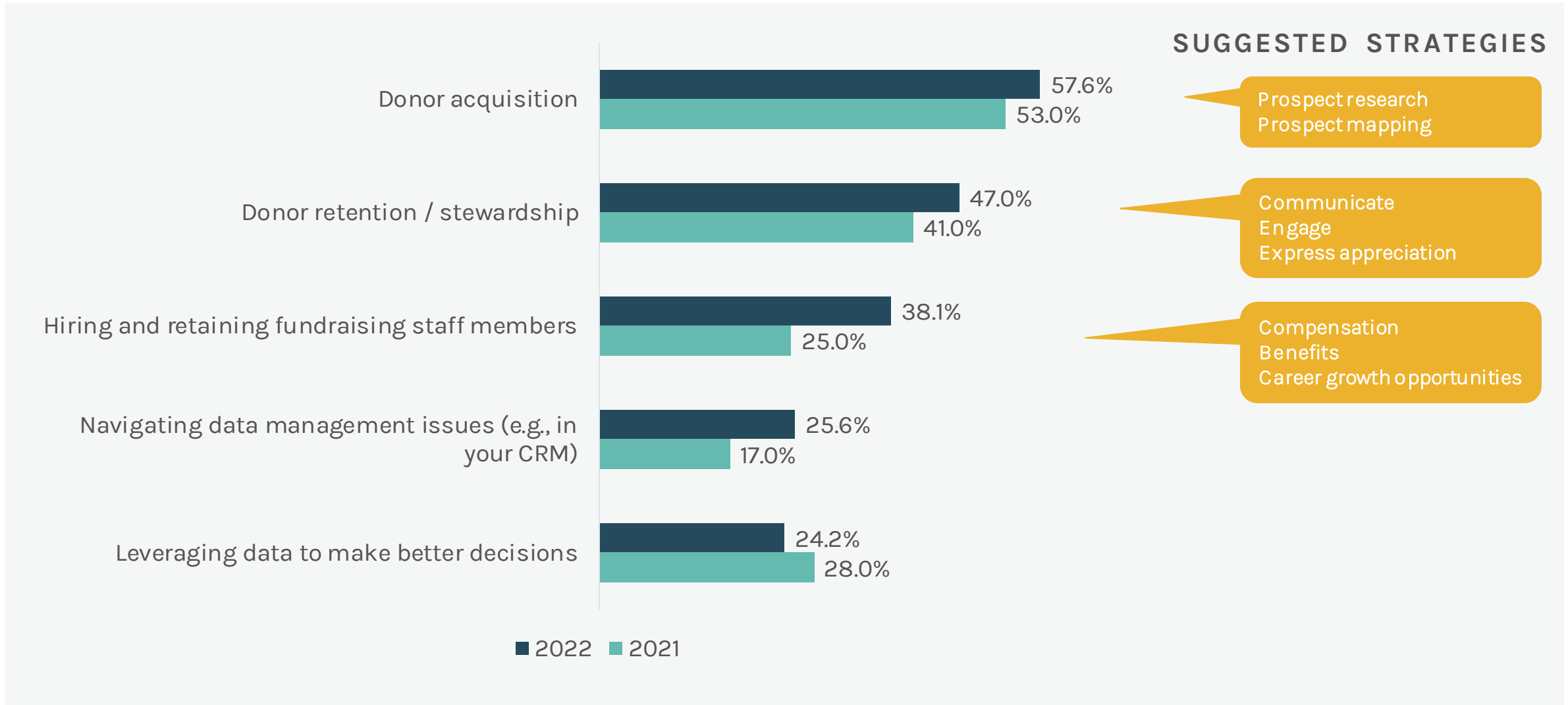
# Engaging and Retaining Donors



# Common Stewardship Practices



# Fundraising Challenges & Solutions



# Recruiting and Retaining Staff

90% of fundraisers stated that unfilled fundraising positions significantly increased their workloads and a similar amount agreed that their organizations didn't employ enough people to raise as much as they had the potential to attract.



Generate and reward referrals



Create opportunities for upward mobility



Compensate well - both salary and benefits



Provide professional development



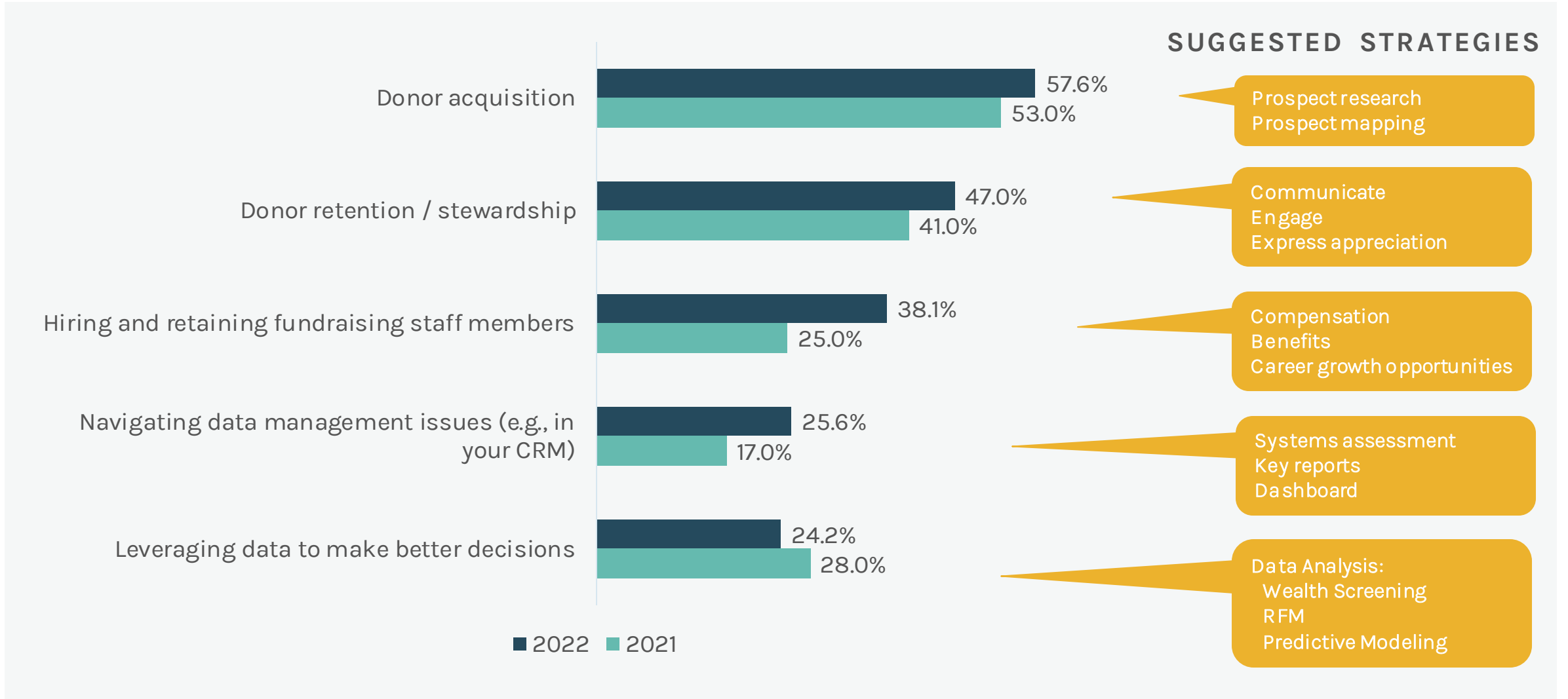
Promote work-life balance and well-being



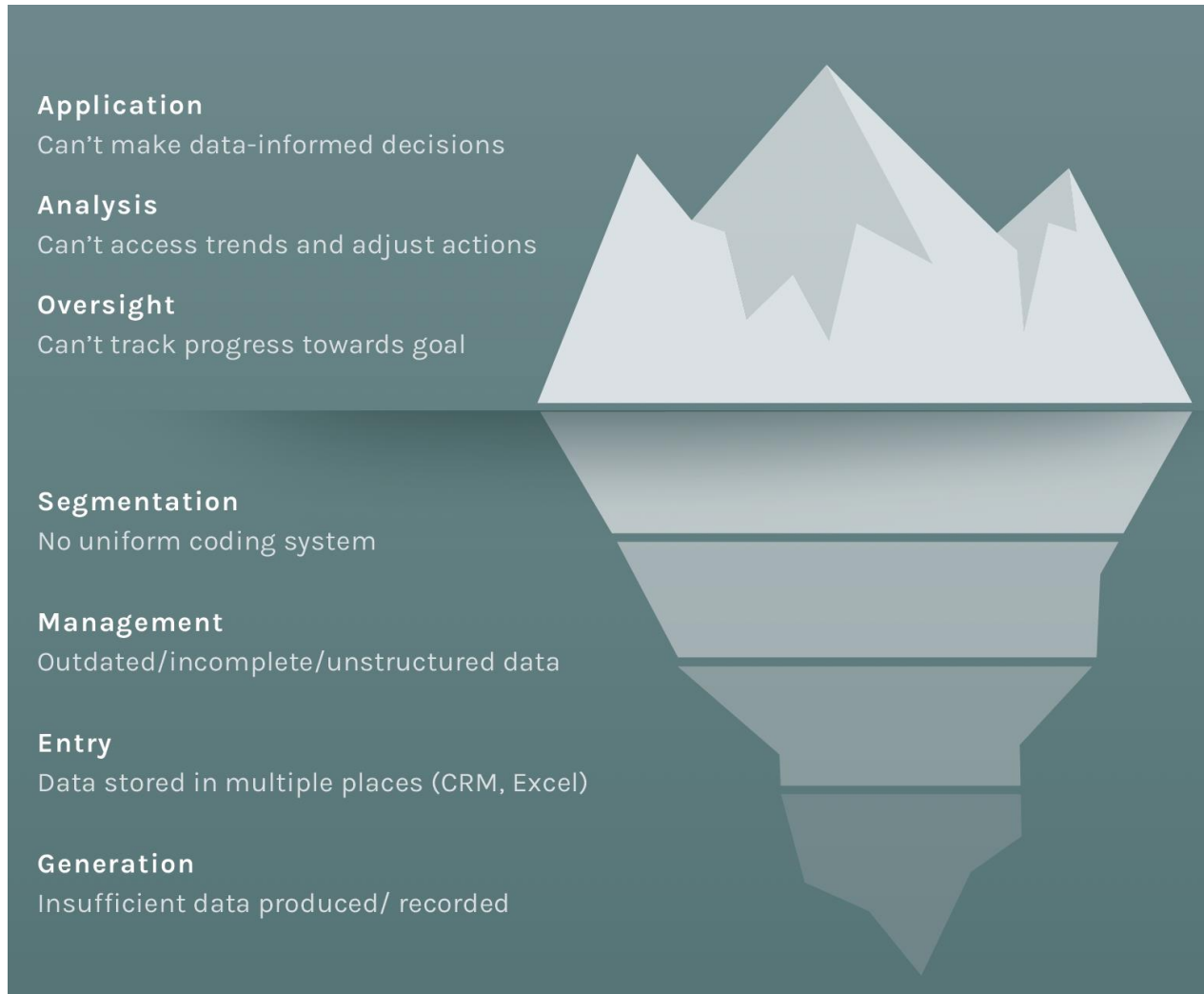
Express appreciation



# Fundraising Challenges & Solutions



# Effective Data Management



**UNDERSTAND THE CURRENT STATE**

Deep analysis of your database, systems, reporting, and workflow



**DEFINE THE FUTURE STATE**

Build a framework for the ideal data entry, management, and prioritization and application of data



**BRIDGE THE GAP**

Implement vital systems improvements and clean reports and dashboards to support sustainable growth

# Leveraging Data to Identify Top Prospects

Wealth screening, predictive modeling and RFM analysis can help identify your best prospects

## PREDICTIVE MODELING

Forecasts future giving behavior



Full donor database:  
**10,000** constituents



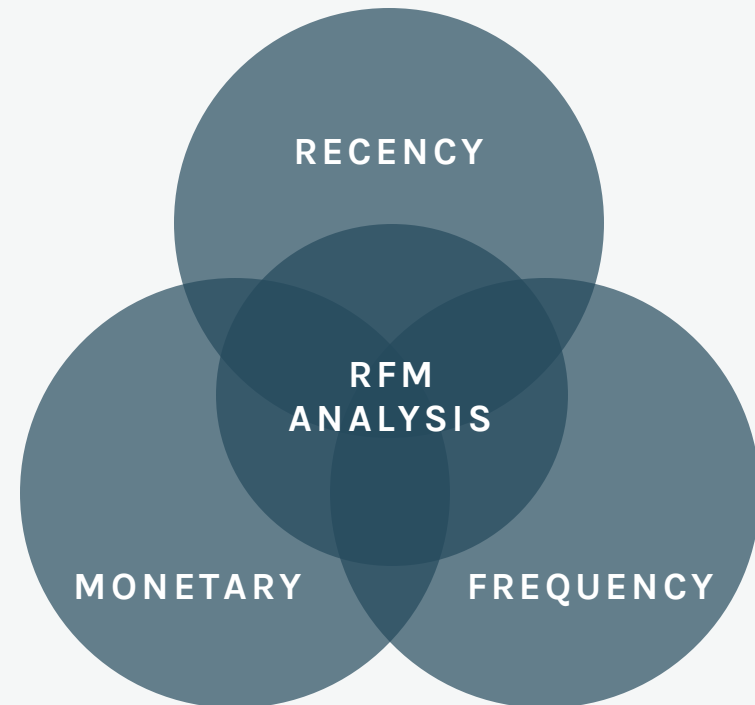
Apply multiple filters:  
**4,000** constituents



Add additional criteria:  
**250** constituents

## RFM ANALYSIS

Segment donors based on giving



# CCS's 2023 Philanthropic Landscape



For the past 12 years, CCS's Philanthropic Landscape reports have compiled and analyzed data from Giving USA and other leading industry sources to reveal an accurate, laser-focused look at the current state of philanthropy in the US.

**DOWNLOAD  
HERE**





Thank You