

# Raise More Money in 1-3 Hours A Week

MARCH 8, 2023

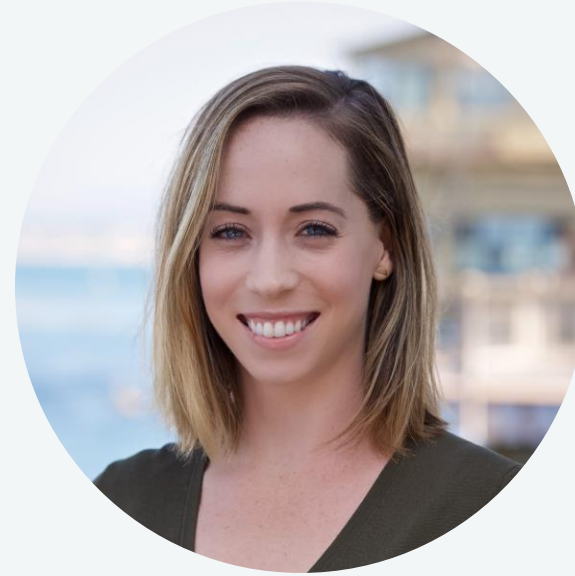


# PRESENTERS



**CHRISTOPHER DAKE**

Vice President  
CCS Fundraising



**ANNE THOMAS**

Assistant Vice President  
CCS Fundraising

# ABOUT CCS

For over 75 years, we've worked with nonprofit partners to make local, national, and global change.



Leading experts in campaign and development strategy



Experienced across nonprofit sectors and locations



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

# GIFT PLANNING PRACTICE GROUP



Claire Bens  
London



Kelly Ciotti  
Seattle



Christopher Dake  
Washington DC



Max DeLott  
New York



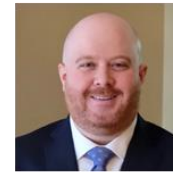
Carolyn Ferguson  
New York



M. Angel Flores  
New York



Stephanie Gilardi  
New York



Jay Gilman  
St. Louis



Paige Jorgenson  
Milwaukee



Sean King  
New York



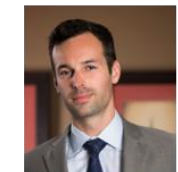
Christianna Luy  
Phoenix



Jeremy Monty  
Milwaukee



Christina Moore  
Houston



Dominic Pepper  
Philadelphia



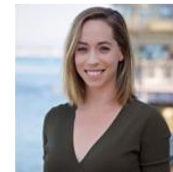
Tori Sivco  
New York



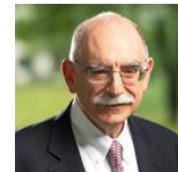
Christopher Smith  
Los Angeles



Troy Smith  
New York



Anne Thomas  
Los Angeles



Mark Urban  
Philadelphia



Hannah Yartz  
Denver

# TODAY'S GOALS

01

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DEFINE  
GIFT  
PLANNING

02

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UNDERSTAND  
PHILANTHROPIC  
LANDSCAPE +  
POTENTIAL

03

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LEARN WHAT  
YOU CAN DO  
IN 1-3 HOURS  
A WEEK

04

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KNOW HOW  
PLANNED  
GIVING CAN  
DRIVE  
RESULTS



# Define Gift Planning

# ESTABLISHING A SHARED UNDERSTANDING



**GIFT PLANNING  
CULTURE**



**PLANNED GIVING  
PROGRAM / STRATEGY**



**DEFERRED GIFT  
TOOL**



# Understand Philanthropic Landscape & Potential



# A UNIQUE MOMENT FOR PHILANTHROPY



WEALTH TRANSFER



PANDEMIC + ECONOMIC SHIFTS



DONOR SOPHISTICATION



NONPROFIT SOPHISTICATION

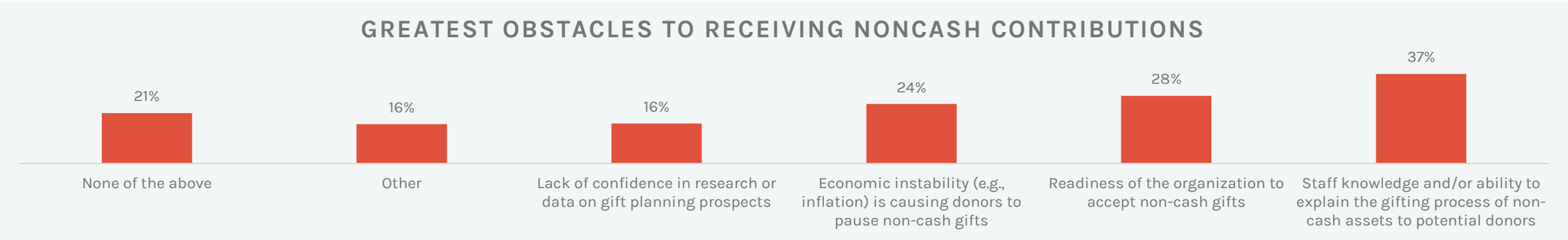
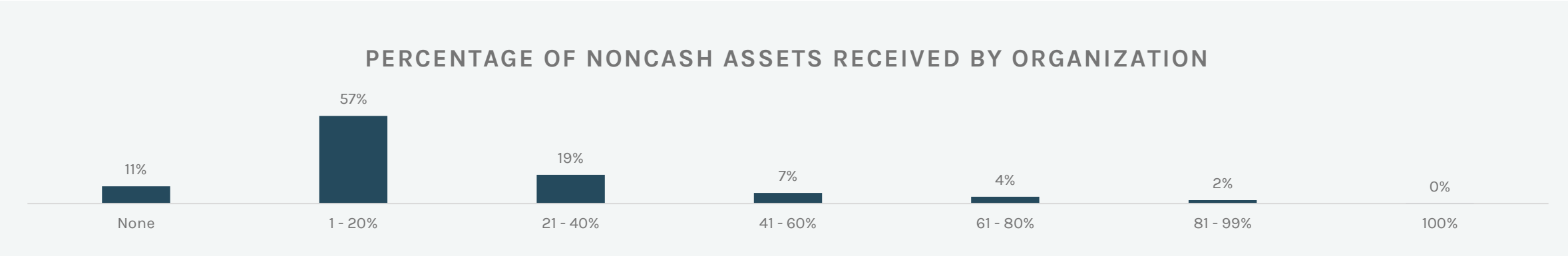
# CCS PHILANTHROPY PULSE

## GIFT PLANNING TAKEAWAYS

- 1 Area in Which Fundraising Staff Have the Lowest Levels of Expertise
- 2 Nonprofits Receive More Gifts From Donor-Advised Funds Despite Potential in Other Assets
- 3 More Than Half of Nonprofits Expect an Increase in Deferred Gifts in 2023

# CCS PHILANTHROPY PULSE

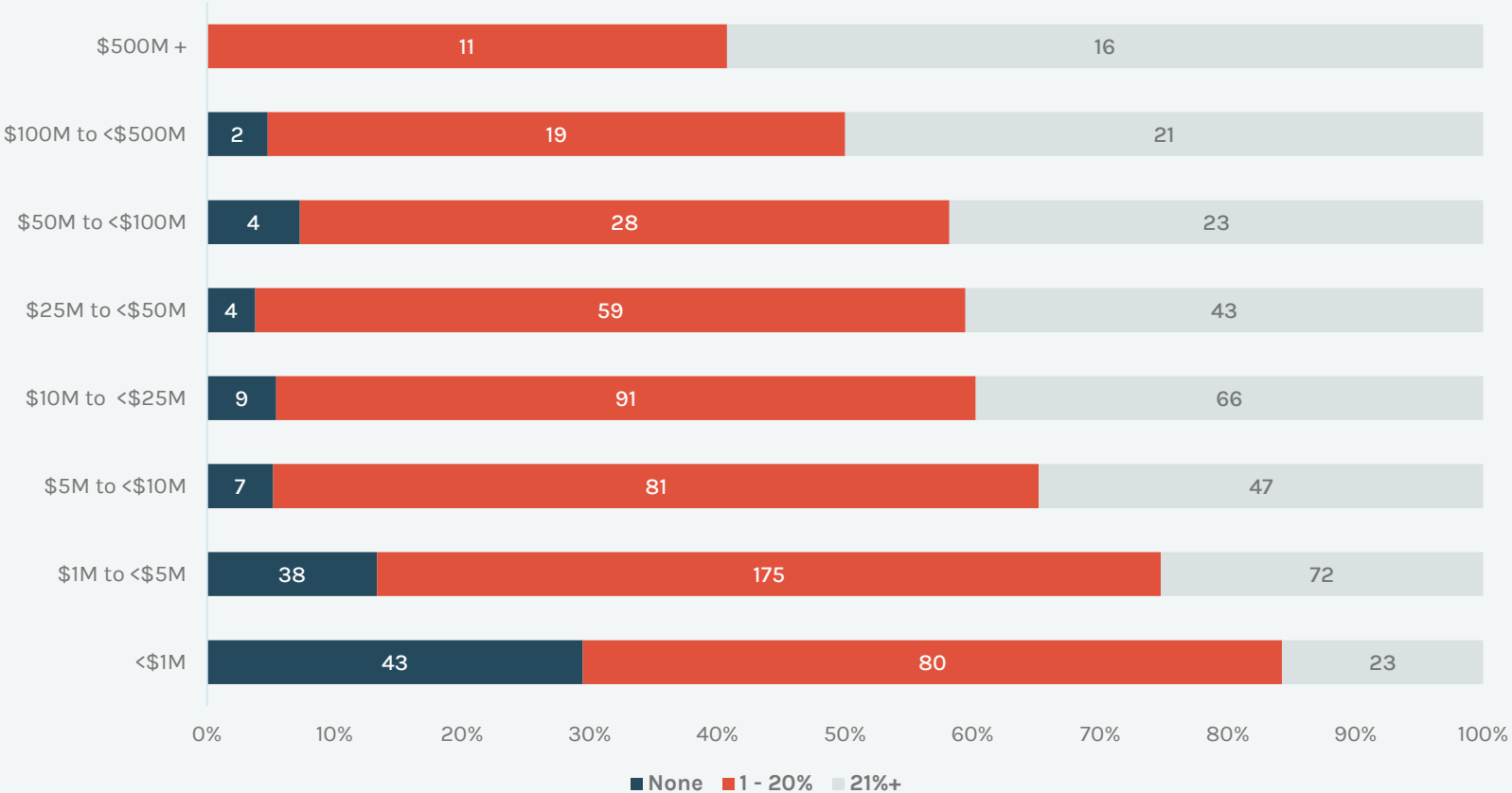
WHAT BARRIERS DO ORGANIZATIONS FACE IN ACCEPTING MORE NONCASH CONTRIBUTIONS?



Cash is defined as cash, check, or wire transfer from a bank account. Noncash is defined as gifts of stocks/bonds, real estate, etc. but also includes foundations, DAFs, retirement assets, etc.

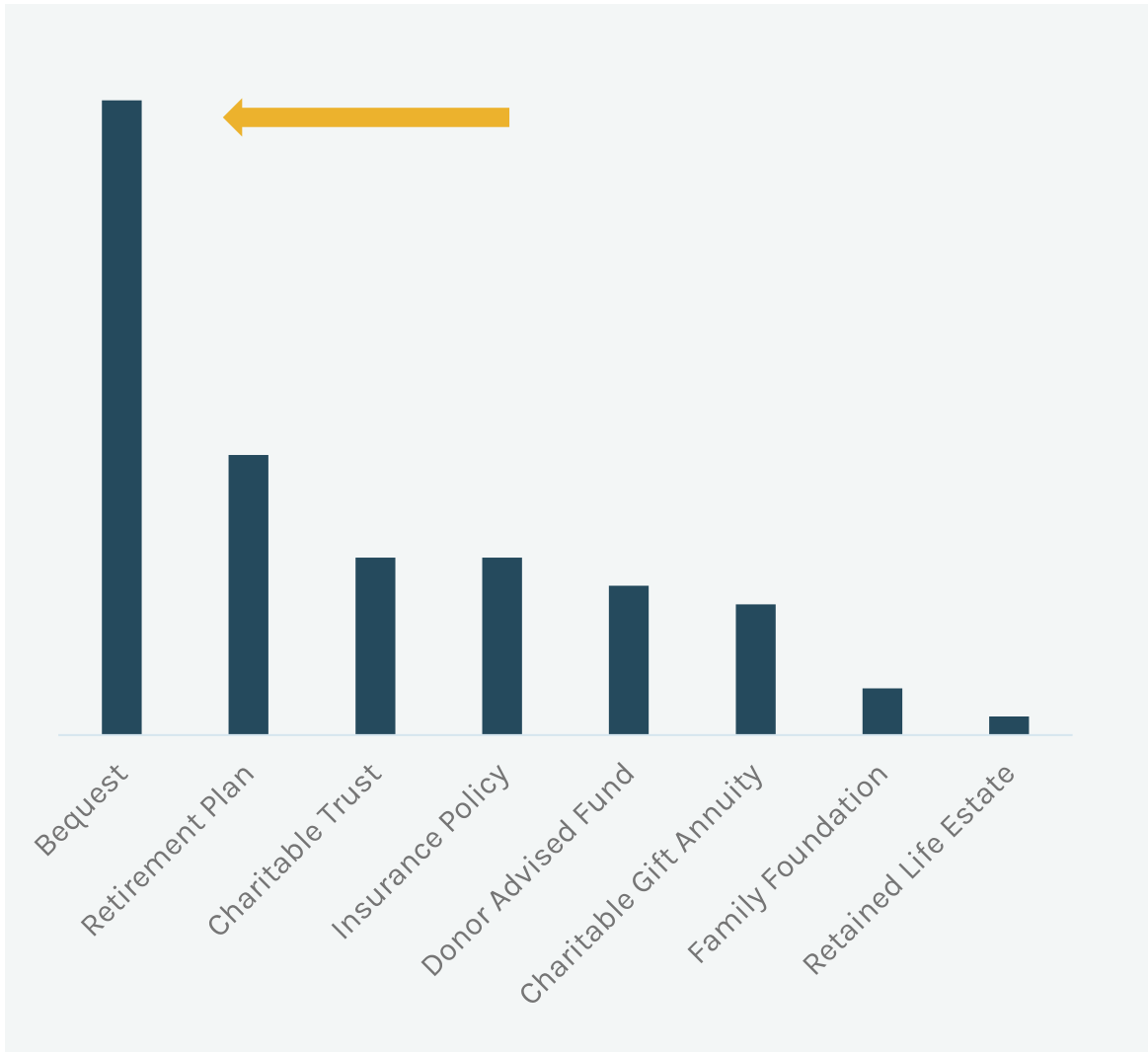
# CCS PHILANTHROPY PULSE

ANALYSIS OF PERCENTAGE OF NONCASH ASSETS VS BUDGET



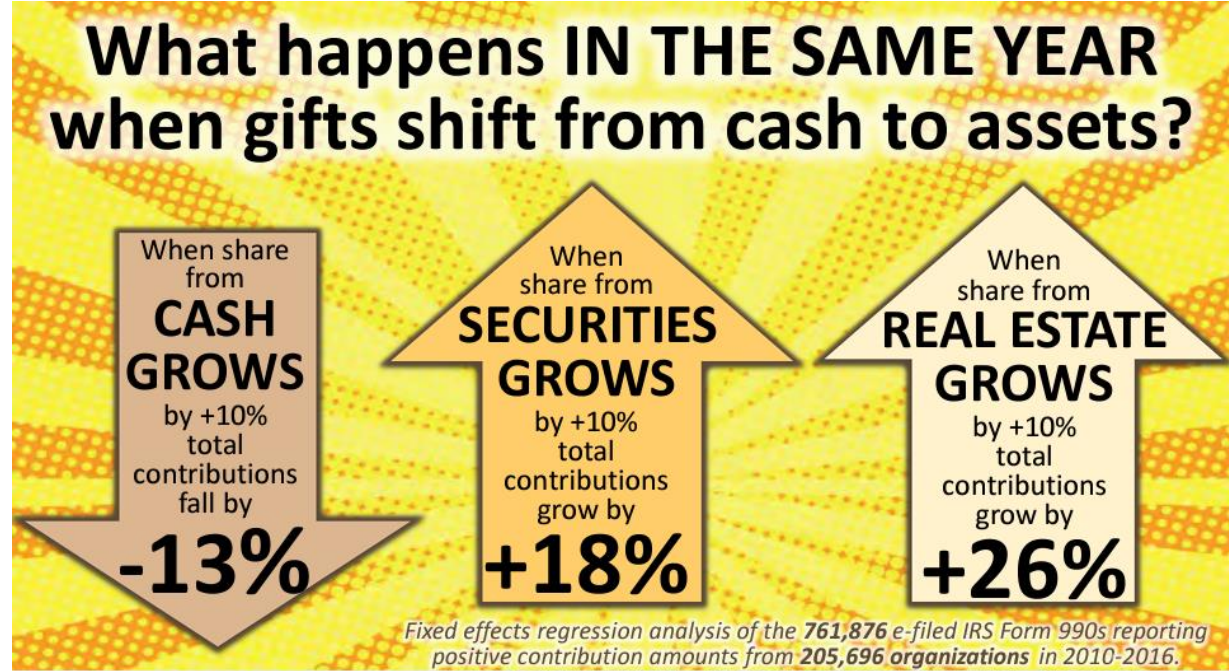
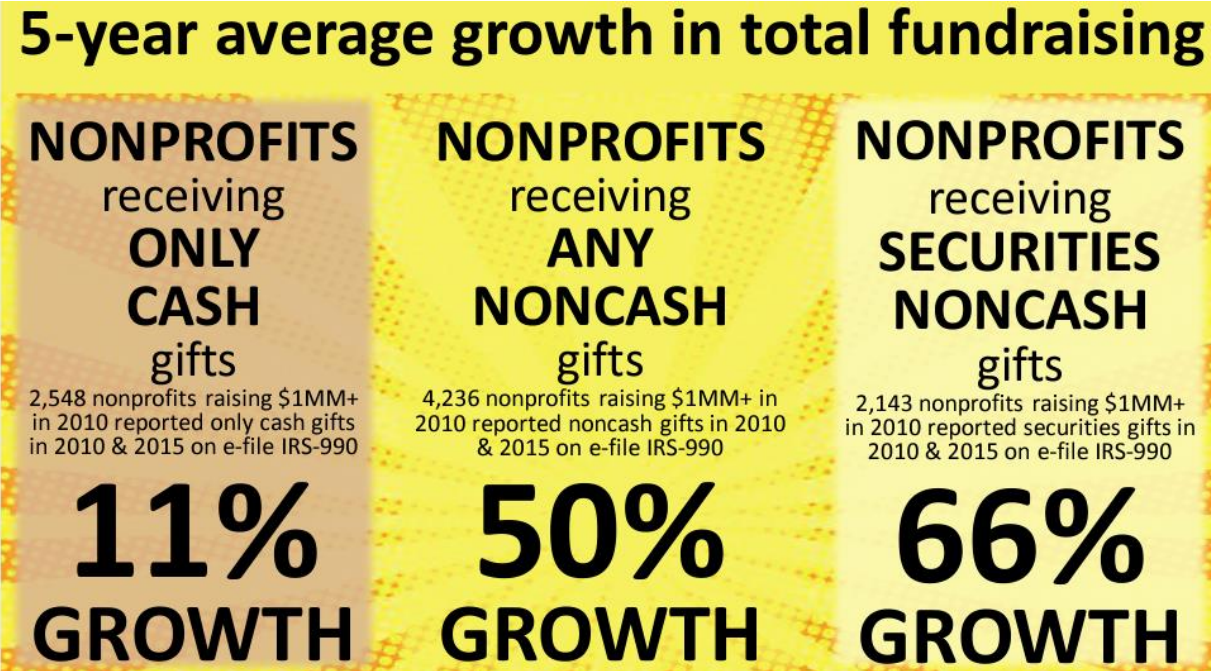
Implementing a planned giving program is an effective way to diversify revenue streams and move donors along a continuum of commitment to your organization. CCS's partnership with Holocaust Museum LA (HMLA) serves as a helpful example of how to design a planned giving program. [Learn more here.](#)

# BEQUESTS IN THE U.S.



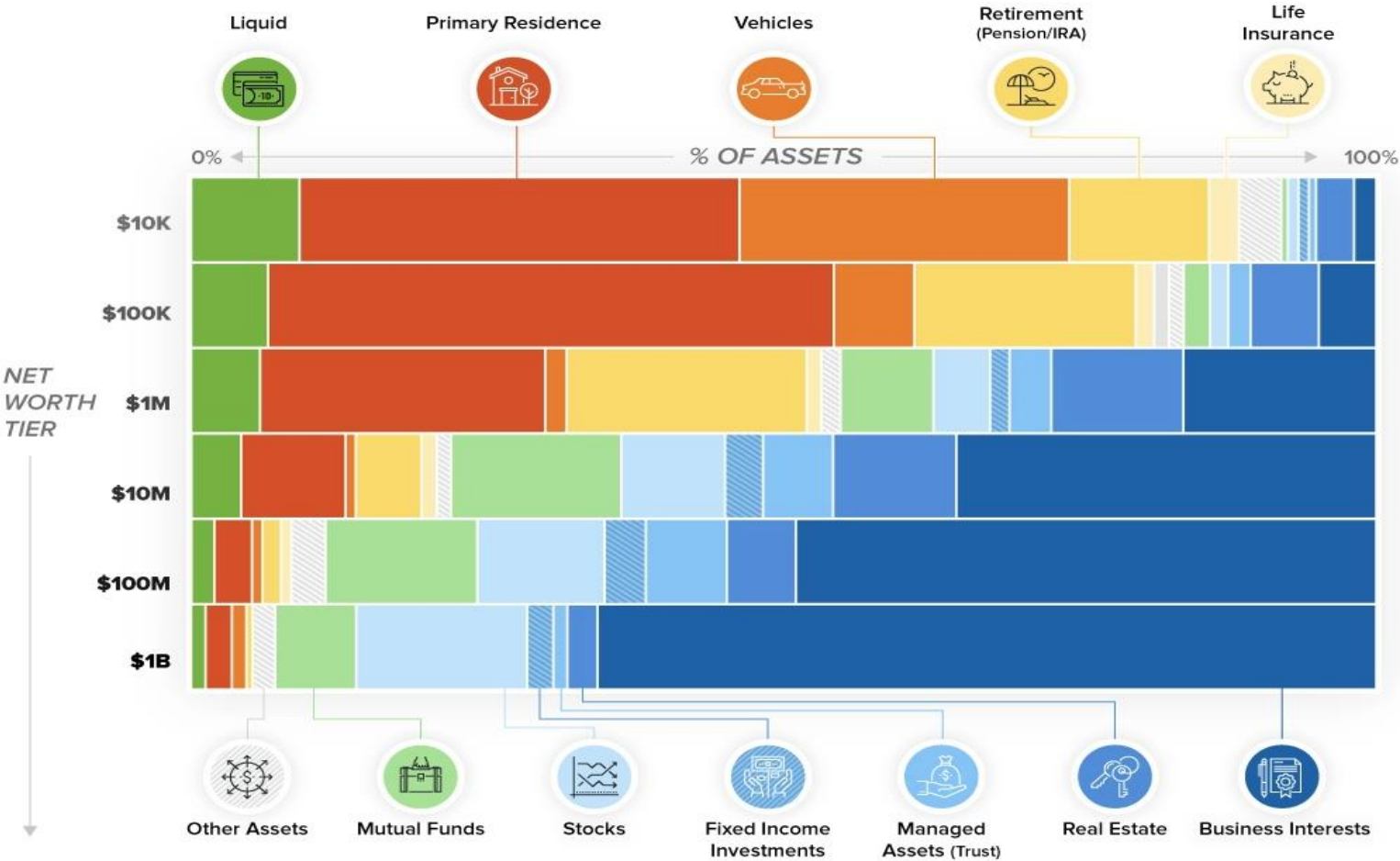
- \$484.8** Amount (in Billions) given to charity by Americans in 2021
- \$46.01** Amount (in Billions) given through Bequests by Americans in 2021
- \$13.71** Amount (in Billions) given through Bequests from estates of less than \$1 Million
- 44** Average age donors make their Will
- 53** Average age donors added a charitable beneficiary to their Will

# NONCASH ASSETS DRIVE GROWTH



# WHAT ASSETS MAKE UP WEALTH?

A LOOK AT ASSET DISTRIBUTIONS BASED ON NET WORTH TIERS





TRANSFORM Your Fundraising  
in 1 to 3 Hours a Week



# PLANNED GIVING IS A COMMITMENT

COMMITTED CULTURE BREEDS SUCCESS

Clarity of Purpose

Confidence

Accountability

Momentum

Education

Identification

Strategy

Action

# MANAGE YOUR ATTENTION

WHAT YOU PAY ATTENTION TO BECOMES YOUR EXPERIENCE. - MAURA NEVEL THOMAS, PRODUCTIVITY EXPERT

Decide where you will focus your attention: **Education | Identification | Strategy | Actions**

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Tasks	EDUCATION	IDENTIFICATION	STRATEGY	ACTION	ACTION
Time	30 minutes	30 minutes	1 hour	30 minutes	30 minutes

# EDUCATION & ACTION | GIFT ACCEPTANCE POLICIES



Lean on  
Existing Resources



Audit +  
Update Policies



Ensure  
Gift Documentation  
+ Accuracy

# IDENTIFICATION | DATA ANALYSIS

## SIMPLE APPROACH

### RFM DATA SCORING

**Recency:** How recently have they given?

**Frequency:** How long has this person been associated with your organization?

**Monetary:** How much have they given over time, what was their largest gift?

### ADDITIONAL DATA

Volunteer / Organizational Involvement

Age

Marital Status

Heir Status

Wealth Screen Insight

# STRATEGY | RESOURCING

## INTERNAL CONSIDERATIONS

### STAFF

- Do you /does staff have support to be successful?
- What professional learning would be valuable?
- Are there systems that could make you more effective?

### LEADERSHIP

- Are they advocates in this work?
- Do they understand the implications on long-term fundraising?
- Does this team need training?

### VOLUNTEERS

- How are they engaged?
- Do they need training?
- Have they made personal deferred gift commitments?
- Do you have an advisory network who can support your efforts?

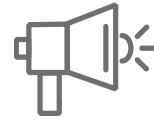
# STRATEGY & ACTION | BOARD INVOLVEMENT



Oversight +  
Resourcing



Personal  
Investment



Advocate



Make  
Connections

# EDUCATION | DONOR ENGAGEMENT

## BUILDING YOUR CONSTITUENTS FINANCIAL HEALTH

**Charities are uniquely positioned to help their constituents and donors build and protect intergenerational wealth.**

This incredible and life-altering service can be achieved by encouraging individuals to:

1. Write a Will
2. Create an estate plan
3. Create a succession plan for a business
4. Name beneficiaries
5. Teach children about personal finance
6. Invest in children's education
7. Invest in the stock market and real estate
8. Take advantage of life insurance

# STRATEGY | DONOR ENGAGEMENT

HOW ARE YOU CONNECTING?



41% of donors first learned about planned (deferred) giving via marketing or outreach from nonprofit organizations

AREAS OF FOCUS

Gift impact

Mission impact

Personalized communications

“Snail” mail continues to be important





# ACTION | DONOR ENGAGEMENT



Start  
Conversation



Listen for Cues



Propose  
Blended Gifts  
(Cash + Planned Gift)



Draft a Bequest  
Appeal

# ACTION | MARKETING & COMMUNICATIONS



Get the  
Message Out



Update  
Communications  
Channels



Invest Time  
in a Brochure



Send a Survey  
or Postcard

# STRATEGY | LEGACY SOCIETY

## EXISTING LEGACY SOCIETY

Audit + Invite

Learn + Engage

Market

## NEW LEGACY SOCIETY

Branding

Establish Qualifications

Member Benefits

Invite Donors

Inside-Out Solicits

Engagement Opportunities

# STRATEGY | LEGACY SOCIETY

## FUNDAMENTALS OF LEGACY SOCIETY BENEFITS

### ACCESS

Provide access to leadership and other entities to help foster the feeling of being an “insider” at the organization

### INFORMATION

Share information about how donors’ future gifts will make a difference in the organization’s work

### EXPERIENCE

Offer donors the opportunity to see and understand their generosity and the organization’s impact in action

# EDUCATION | PROFESSIONAL DEVELOPMENT & TRAINING

Building your expertise in gift planning is building your expertise in philanthropy.

## KEY CONTENT

- Prospect identification tactics
- Internal process, policy, and resources
- Basics about non-cash giving vehicles
- Impact of planned giving on long term institutional growth and financial stability
- Legislative updates that affect giving opportunities

## RESOURCES

- National Association of Charitable Gift Planners
- Regional Charitable Gift Planning Councils and Conferences
- Gift Planning Associations
- Academic Experts
- Gift Planning Websites
- Estate Planning Companies
- Gift Planning Marketing Companies
- E-Learning Resources: Webinars and YouTube

# ACTION | MEASURE YOUR PROGRESS

- Identify key goals and implement measurable metrics for all forms of gift planning activity (communication outputs, cultivation practices, and stewardship vehicles, etc.)
- Evaluate the efficacy of metrics on an annual basis and adjust where necessary.

## COMMON MEASUREMENTS OF SUCCESS (PER QUARTER / PER YEAR)

- Number of planned giving mailings
- Number of broader communications that feature planned giving information
- Number of leads received from each mailing and communication channel
- Number of legacy society stewardship events held
- Number of donor education events held
- Number of planned giving visits or phone calls conducted by gift officers
- Number of proposals or blended proposals delivered
- Number of gifts by asset type (cash; noncash asset; combination)
- Number of gifts by giving vehicle (cash, stock, DAF, bequest, remainder trust, gift annuity, etc.)



What Resonates for You?

# PLANNED GIVING CAN DRIVE RESULTS

**01 GROWTH:** Organizations pursuing gifts of assets beyond cash are growing.

**02 SUSTAINABILITY:** Noncash assets create a sustainable revenue pipeline.

**03 LARGER GIFTS:** Up to 90+% of wealth in the U.S. is in noncash assets.

**04 EASIER GIFTS:** In a difficult or unstable economy, cash is kept close. Ask for noncash assets.

**05 NEW MONEY:** Trillions in anticipated generational wealth transfer with the peak estimated for 2030.

**06 FOR EVERYONE:** Gift planning culture democratizes philanthropy.

**07 TRUE PARTNERSHIP:** Opportunity to partner with donors by helping to build their financial health and literacy for the benefit of your organization.





# CLOSING NOTES

Decide to  
Commit

Understand Your  
Potential

Plan Your Work

Work Your Plan



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Thank You