



IDENTIFYING AND ENGAGING NEW PROSPECTS

1 September 2021



OUR CONVERSATION PARTNERS



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TODAY'S AGENDA

- I. Reviewing key recommendations to date
- II. Identifying and engaging new prospects
- III. Next steps and discussion

REVIEWING KEY RECOMMENDATIONS TO DATE

SESSION I:

MAKING YOUR CASE FOR SUPPORT IN THE CURRENT ENVIRONMENT



Identify the most essential, unique, mission-critical aspects of your work that would benefit from philanthropy



Think about ways to package your existing work to attract new funding



Consider establishing a consistent schedule of Zoom briefings and opportunities for donors to give and get involved

SESSION II:

GETTING THE MOST OUT OF YOUR BOARD AND VOLUNTEERS



1

Conduct a back-of-the-envelope assessment of your current Board/volunteers



2

Build a list of prospective new Board members who would add value in specific ways



3

Keep working on your case for support, which will be a critical tool for recruiting

DISCUSSION

1. Which recommendations have the greatest relevance for your organization?
2. Have you developed plans to implement any of the recommendations?
3. What challenges are you experiencing or anticipating in relation to making the case or working with board/volunteers?

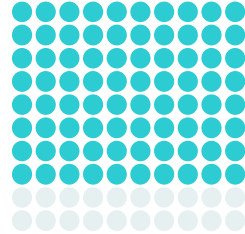
IDENTIFYING AND ENGAGING NEW PROSPECTS

20% OF HOUSEHOLDS PROVIDED 80% OF DOLLARS DONATED



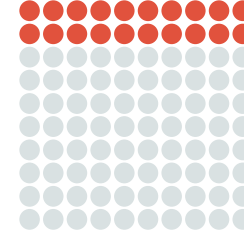
53%

of the general population gives
(\$2,763 on average annually)



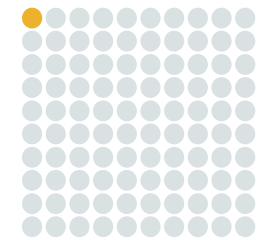
90%

of affluent* households give
(\$29,269 on average annually)



20%

of households provided 80%
of dollars donated



1%

of households provided 45%
of dollars donated

* "Affluent" households are defined in this study as those with either an annual household income of at least \$200,000 and/or a net worth of at least \$1 million, excluding primary residence. Note that the trends on the previous page apply to the general United States population.

Sources: IUPUI Lilly Family School of Philanthropy, *16 Years of Charitable Giving Research* (2019), Bank of America and IUPUI Lilly Family School of Philanthropy, *The U.S. Trust Study of High-Net-Worth Philanthropy* (2018), Blackbaud, *Vital Signs, Part 3: How Major Donors Are Shaping Philanthropy* (2020).

THE MOST CONFIDENT ORGANIZATIONS ARE VERY UPFRONT



CANCER
RESEARCH
UK

Together we will beat cancer



Donate

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Our Privacy Policy

This policy describes how and why Cancer Research UK uses your personal information, how we protect your privacy when doing so, and your rights and choices regarding this information. We promise to respect any of your personal information which is under our control and to keep it safe. We aim to be clear when we collect your information about what we will do with it.

We are a large charity with relationships with thousands of fundraisers, volunteers, supporters and researchers, so we use personal information on a day to day basis in order to operate. Our use of personal information allows us to make better decisions, fundraise more efficiently and, ultimately, helps us to reach our goal of enabling three in four people to survive a cancer diagnosis by 2034.

This policy was last updated on 6th November 2020.

Who we are

In this Privacy Policy, “**Cancer Research UK**”, “**CRUK**”, “**we**”, or “**our**” means

1. Cancer Research UK (registered charity in England and Wales (1089464), Scotland (SC041666) and the Isle of Man (1103), a company limited by guarantee in England (4325234) and the Isle of Man (5713F)); and
2. its group companies Cancer Research Trading Limited (company number 4355631 in England) and Cancer Research Technology Limited (company number 01626049 in England).

How we collect information about you	+
What personal information we collect	+
How we use personal information	+
How and when will you hear from us	+
Legal basis for processing	+
How we keep your information safe	+
How long we keep your information for	+
Sharing your information with other organisations	+
Keeping your information up to date	+
Your rights	+
Complaints	+
Changes to this Policy	+
Contact us	+

IDENTIFYING DONORS: LEVERAGING YOUR DATABASE

It is important to stay in consistent contact with all donors in your database and be transparent in your communications – emphasize that you're staying in touch to improve your fundraising outreach.



Capture and update/use contact info regularly



Wealth screen regularly



Conduct a segmentation analysis



Monitor annual appeal responses



Have regular, candid conversations about moves management

STRATEGIES TO ENGAGE NEW PROSPECTIVE DONORS

- Consistent calendar of events
- Basic moves management system
- Dedicated meetings for cold prospecting
- Progressive donor recognition opportunities
- Others???



INTIMATE, SUBSTANTIVE CULTIVATION EVENTS



Small, informal gatherings with engaging thought leaders, in private residences, enabling donors and prospects to gain insights into the major issues facing NYC and the world!

- ✓ Great way for New School donors to warm up their friends to the University's mission and impact.
- ✓ Especially effective given that alumni aren't yet a major driver of philanthropy.

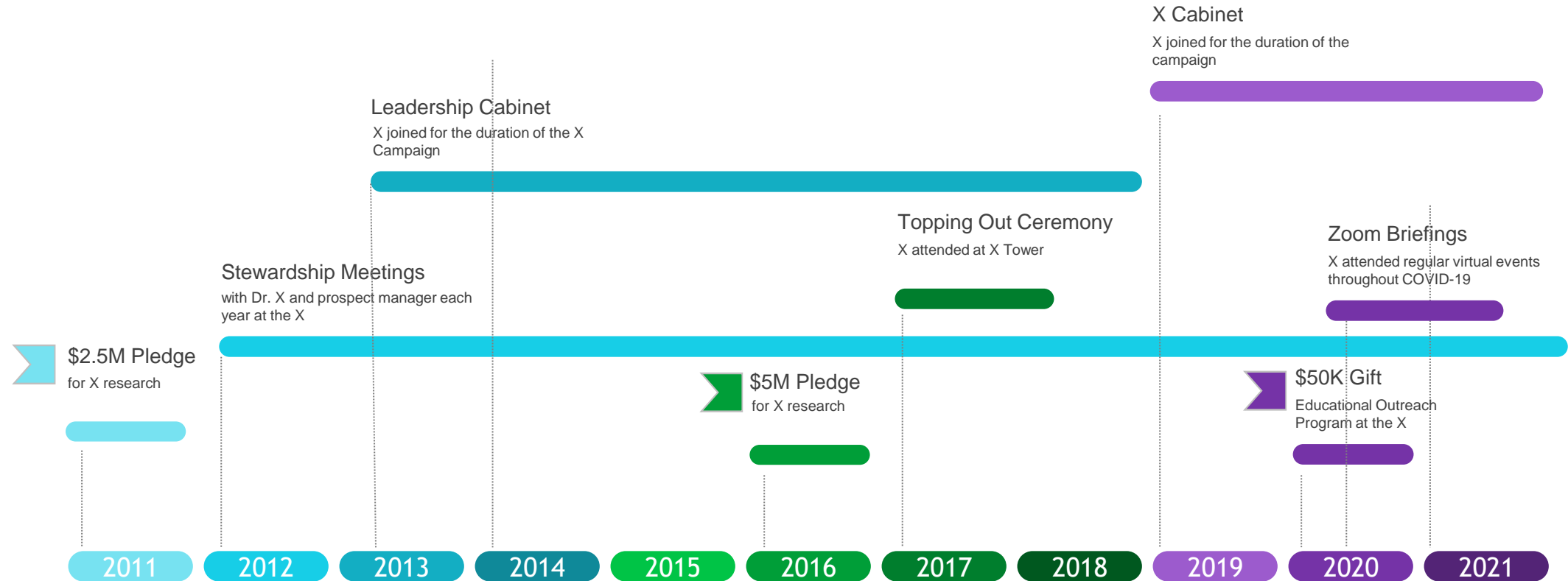
CALENDAR OF EVENTS

	January	February	March	April	May	June	July	August	September	October	November
Major Donors \$10,000 +											
Donors \$1,000-\$9,999											
Donors 0-\$999											
Corporate Sponsors (All)											
Media/ Advertising (All)											
	Conference Call - Special Guest Speaker Discussing a Current Health Topic	Save the date / Annual Benefit Sponsorship Appeal	Small private gathering (NYC area)	Personal phone calls for Summer Benefit Sponsorship	Letter invitation to the Summer Benefit	Annual Summer Benefit	Small private gathering (East End)	Small private gathering (East End)	Small private gathering (East End)	Personal "thank you" note or phone call to walk through annual report	Small private gathering (East End)
		Summer Benefit Save the Date	Quarterly Stewardship Email and Video (Spring happenings/program updates)	Email Solicitation to Attend Summer Benefit	Phone calls to follow up with potential ticket buyers	Quarterly Stewardship Email and Video (School Year Recap / Summer Happenings)			Annual Report/ Quarterly Stewardship Email and Video (Back to School)	East End School Wellness Conference	Personal thank you phone call from Executive to wish them a happy holidays
	Prepare Summer Benefit advertising	Prepare Summer Benefit advertising						Solicitation for Wellness Champion Program		Conference Call - Special Guest Speaker Discussing a Current Health Topic	Quarterly Stewardship Email (Thanksgiving)
						Prepare write-ups and photos for local periodicals					Gratitude Solicitation Email* exclude recent donors
											Giving Tuesday Reminder Email* exclude recent donors / Social Media Giving Tuesday campaign
										Prepare write-ups and photos for local periodicals	
										Prepare write-ups and photos for local periodicals	

Key	
Solicitation	Purple
Stewardship Email	Blue
Small Private Gathering	Light Blue
Special Programs	Green
Donor Touchpoints	Pink
Media	Red

- Monthly dinner parties for board members, donors and friends
- Conference calls
- Personal thank you calls/notes
- Summer Benefit
- Quarterly events
- Gala
- Stewardship videos
- Others???

MOVES MANAGEMENT

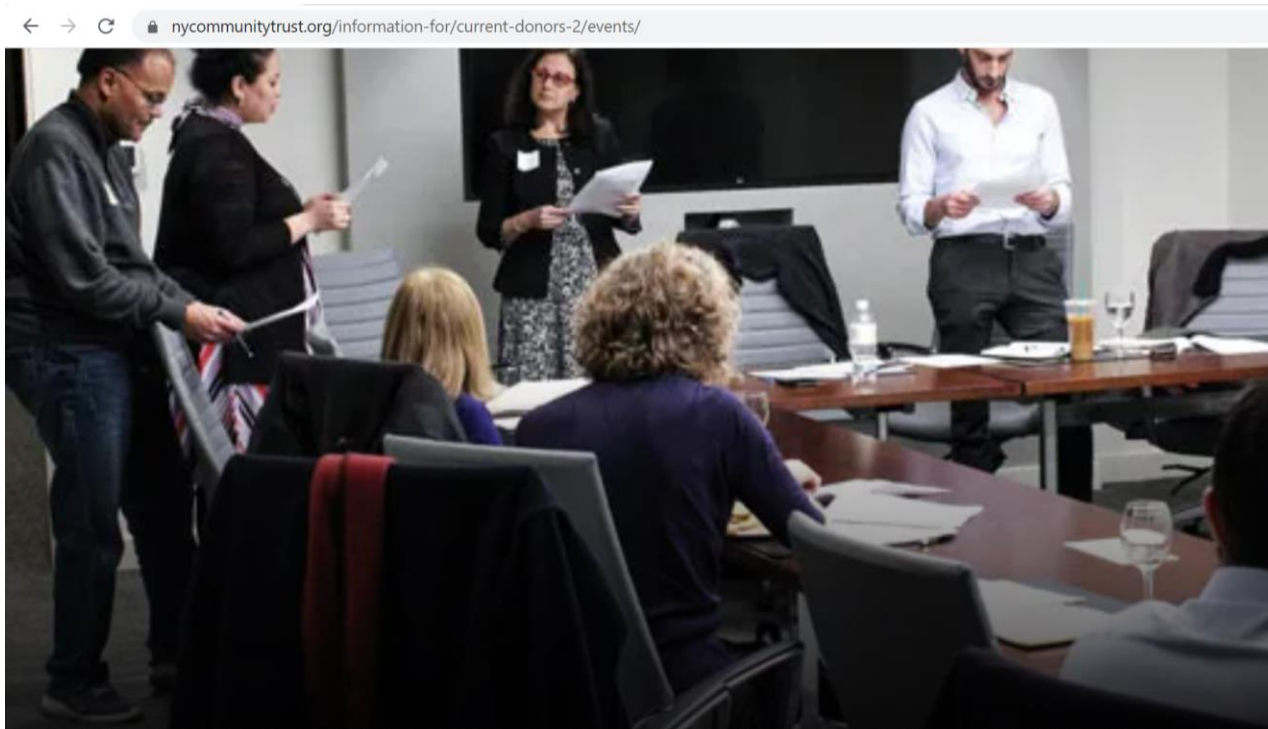


Moves should be **intentional** and executed to:

- Bring prospects closer to the organization
- Forge relationships
- Maximize giving

PARTNER WITH LOCAL OR REGIONAL INTERMEDIARIES

Banks, service organizations, wealth advisors, foundations, community trusts, and others partnering with nonprofits to mutual benefit.



STEPS

1. Identify
2. Engage
3. Schedule

CRIMINAL JUSTICE, BAIL REFORM, AND COURT WATCHING: A HANDS-ON TRAINING

Our donors participated in a learn. Experience. Act. event led by program officer Eve Stotland and Executive Director of VOCAL-NY Alys how to be a court watcher.

APPLY MULTIPLE THOUGHTFUL TOUCHPOINTS

Acknowledgement and Recognition

Make donors feel appreciated by thanking them personally, authentically, consistently and appropriately.

- Phone calls
- Highly personalized letter/email
- Handwritten note
- Video thank you letter
- Personal visit
- Holiday
- Public Recognition

Mission Exposure and Education

Show donors the impact of their gift and deepen engagement and understanding through first-hand experiences and regular, meaningful updates.

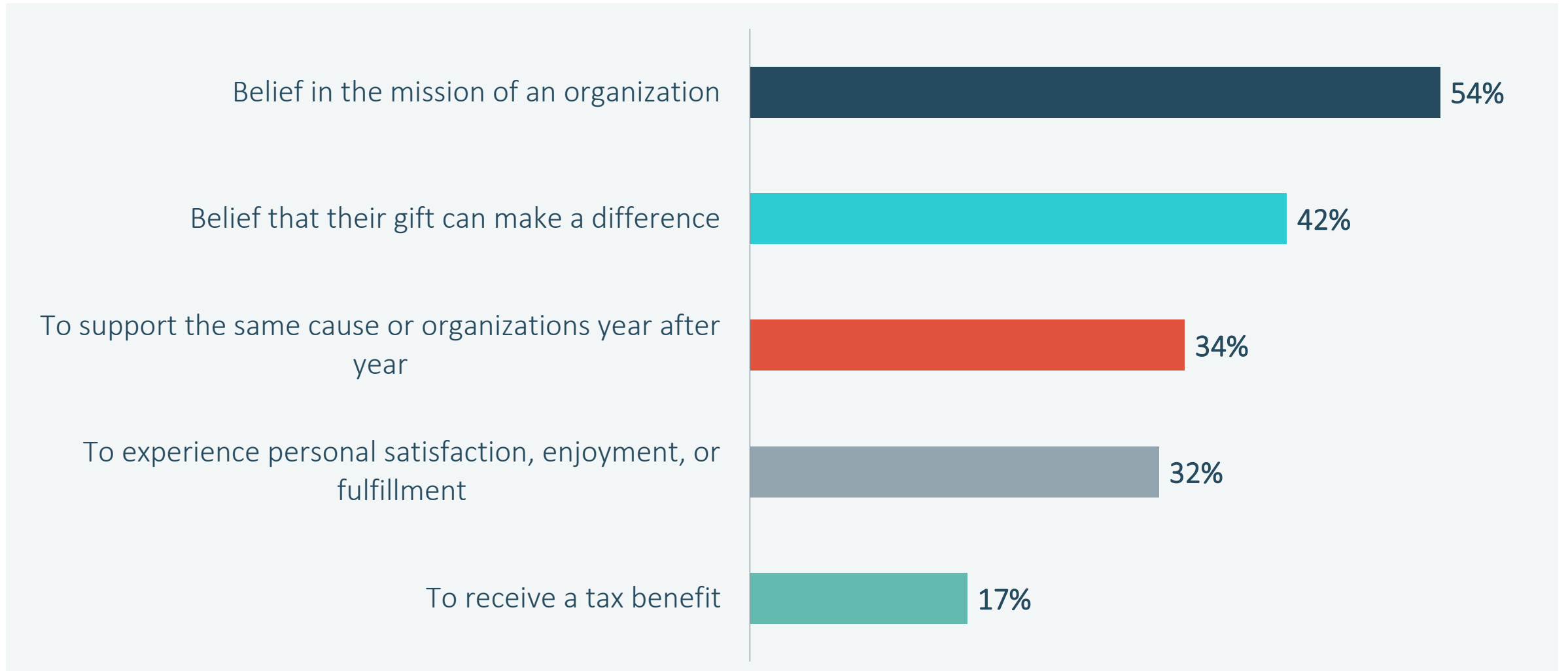
- Conference calls
- Impact report(s)
- Townhalls
- Monthly newsletter
- Speaker series
- Podcasts

Events and Networking

Provide exclusive, informative opportunities for donors to get to know each other and the leadership team and feel like a part of the organization.

- Non-ask events
- Intimate Zoom event
- Small cocktail/dinner party
- Facility groundbreaking
- VIP access at annual fundraising event

LEVERAGE DONOR MOTIVATIONS



LEAN INTO TECHNOLOGY

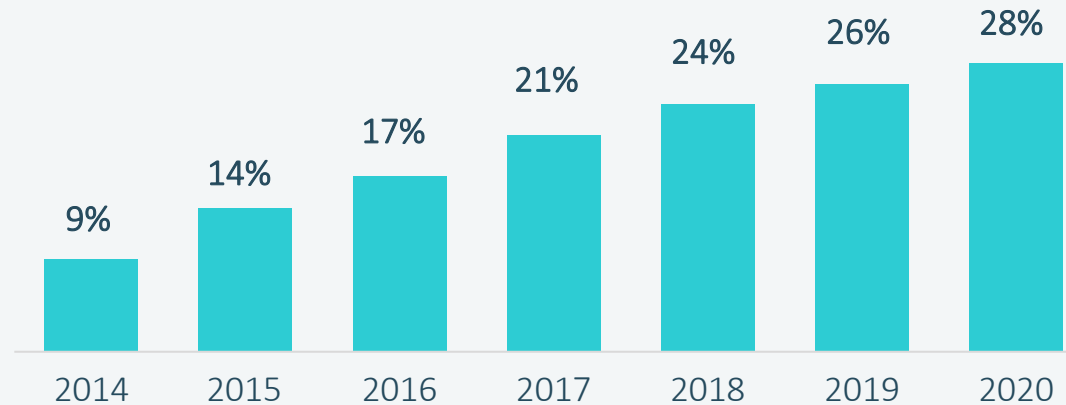
SOCIAL MEDIA IS AN INCREASINGLY PROMINENT PART OF AMERICAN LIFE

240M Active social media users in the U.S., a 4.3% increase from 2020²

\$5B Total amount raised via Facebook and Instagram fundraisers (all-time, worldwide)³

33% Percentage of U.S. adults who say they donate to charity on social media⁴

PERCENTAGE OF ONLINE DONATIONS MADE WITH A MOBILE DEVICE



NEXT STEPS AND DISCUSSION

DISCUSSION

1. What methods are you using now to identify potential new donors?
2. What strategies do you have in place to engage new prospects?
3. What challenges do you anticipate in implementing these strategies?

NEXT STEPS



Look deeper and more regularly within your database for “new prospects”



Update or establish moves management criteria and practices



Establish a calendar of events that enable prospects to find you

THANK YOU!

For more information and resources, visit ccsfundraising.com



ABOUT CCS

CCS is an international fundraising consulting firm that partners with nonprofits for transformational change.

Our areas of expertise include strategic counsel, capital and endowment campaigns, leadership giving, development assessments, and data analytics.



Innovator in the field of fundraising for **7 decades**



Partners with **500+ nonprofits** annually worldwide



Largest professional staff with **300+ full-time employees**



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LEARNING &
TRAINING

A SELECTION OF CLIENTS



Lions Clubs International
FOUNDATION



ELIMINATE

Kiwanis eliminating maternal/neonatal tetanus



 **EMORY**
WINSHIP
CANCER
INSTITUTE
National Cancer Institute-Designated
Comprehensive Cancer Center



 **The Global Fund**
To Fight AIDS, Tuberculosis and Malaria



AFRICA CDC
Centres for Disease Control and Prevention
Safeguarding Africa's Health 

AMNESTY
INTERNATIONAL



 **UNITED NATIONS**
FOUNDATION
Connecting you with the United Nations

 **CDC Foundation**
Together our impact is greater

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AGAINST
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