



Fundraising Strategies in Challenging Times

MAKING YOUR CASE FOR SUPPORT IN THE CURRENT ENVIRONMENT

5 May 2021



TODAY'S AGENDA

- I. Introductions
- II. Today's Philanthropic Landscape
- III. Making Your Case for Support Effectively
- IV. Recommendations and Next Steps

INTRODUCTIONS

OUR CONVERSATION PARTNERS



Sarah Krasin

Senior Vice President
CCS Fundraising



Sacha Lehto

Senior Director
CCS Fundraising



Charlie Michaud

Principal & Managing
Director
CCS Fundraising

ABOUT CCS

74

years of
experience

300+

professionals

500+

clients served
annually

\$15B

managed in 2020
campaign goals

15

offices worldwide

250+

cities in 13
countries in 2020



Lions Clubs International
FOUNDATION



**Weill Cornell
Medicine**



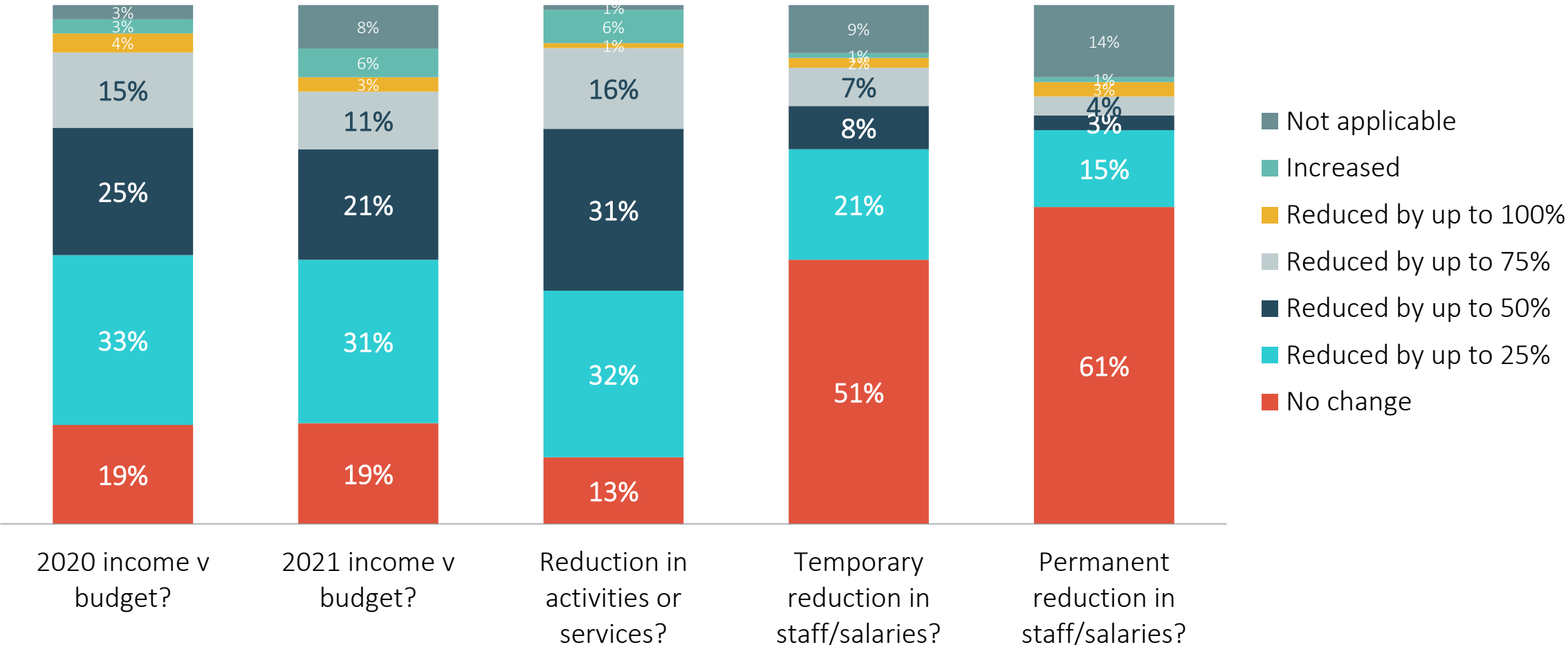
CDC Foundation
Together our impact is greater



TODAY'S PHILANTHROPIC LANDSCAPE

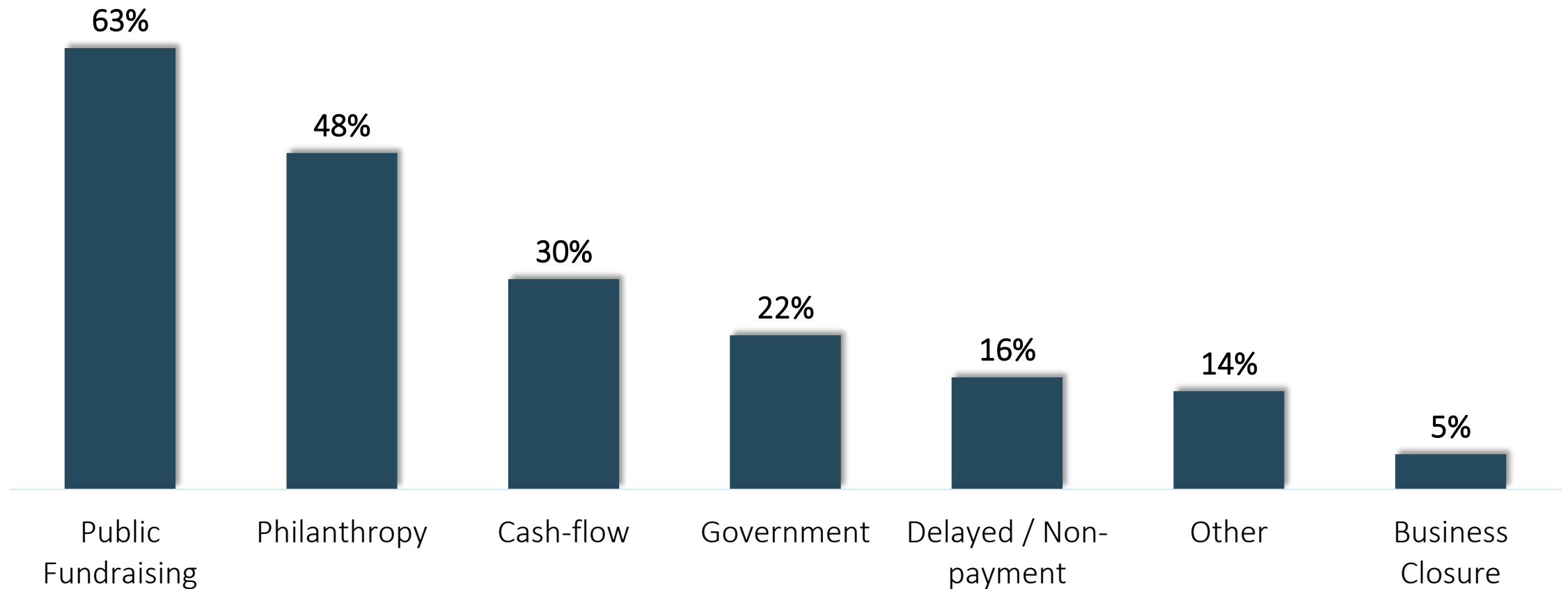
IMPACT OF COVID-19 ON UICC'S MEMBERSHIP

IMPACT ON INCOME AND ACTIVITIES

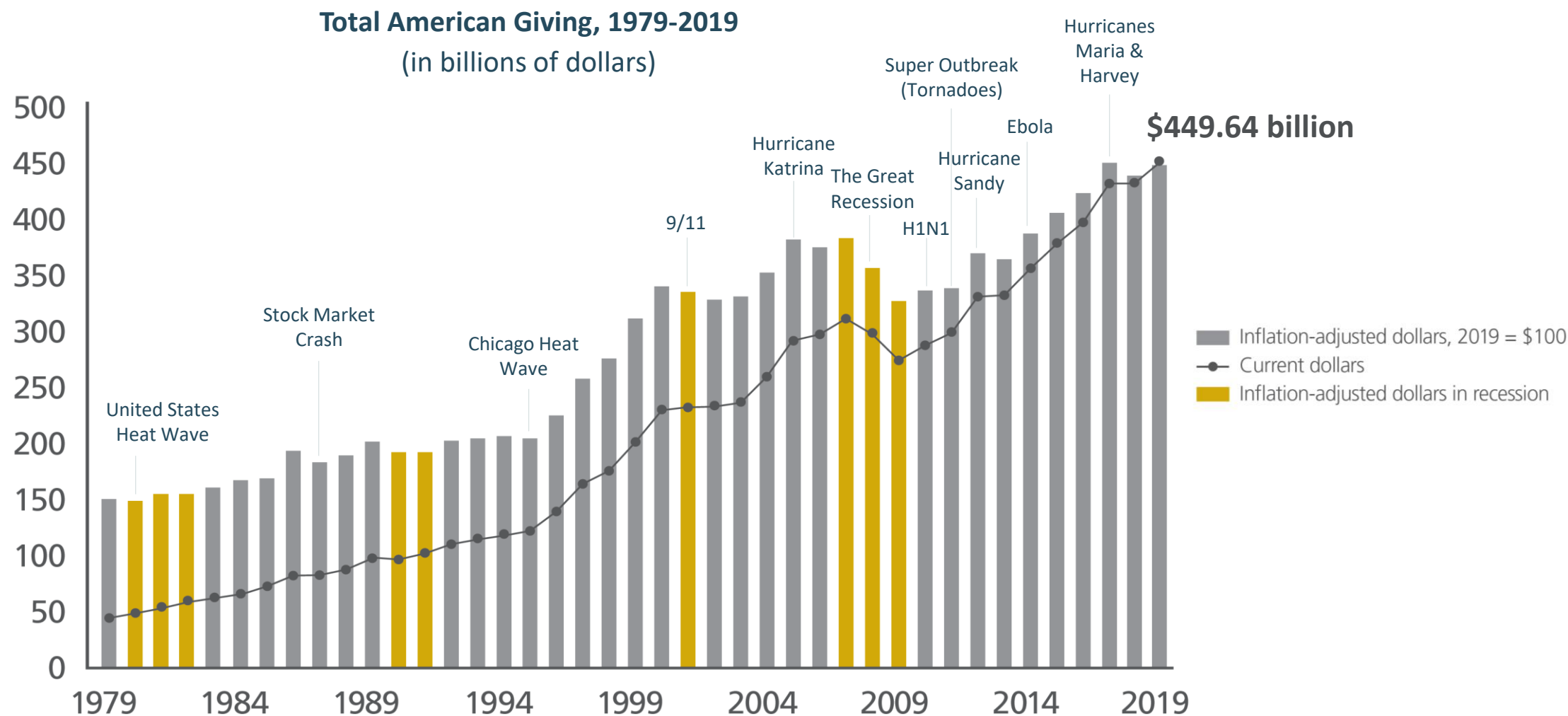


IMPACT OF COVID-19 ON UICC'S MEMBERSHIP (CONT'D)

CURRENT FINANCIAL CONCERNS



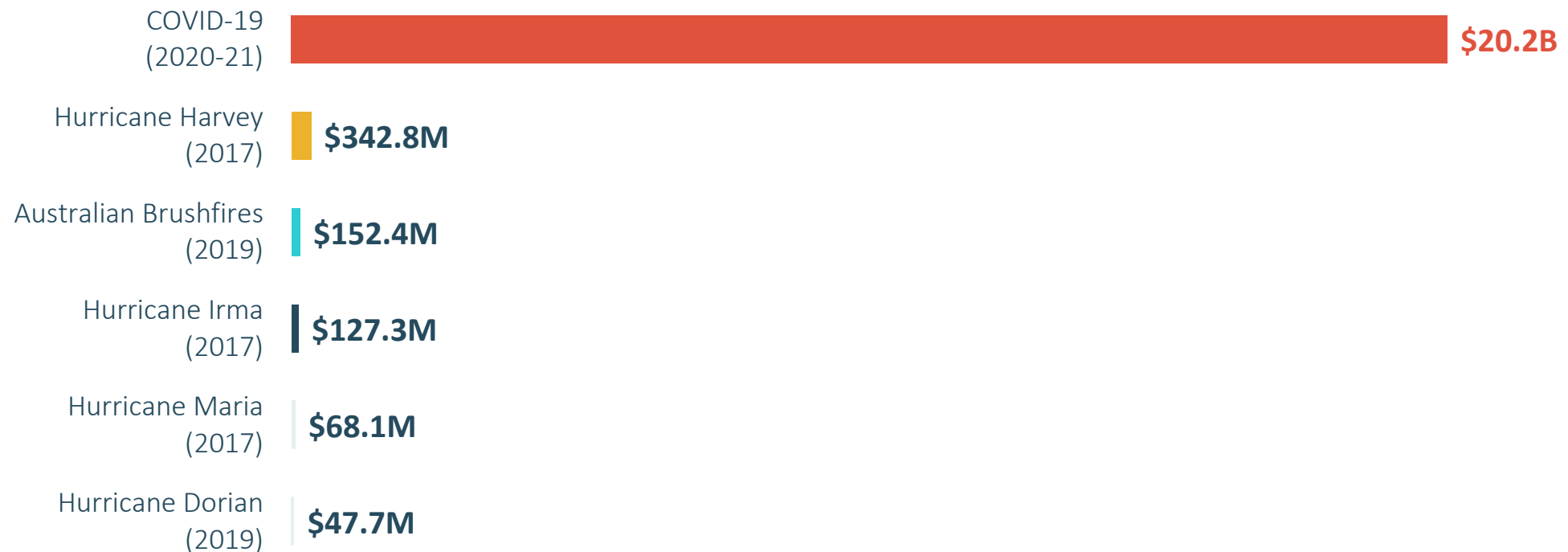
PHILANTHROPY IS RESILIENT IN TIMES OF CRISIS



Source: [Giving USA 2020](#)

COVID-19-RELATED PHILANTHROPY FAR EXCEEDS FUNDING FOR OTHER RECENT DISASTERS

Global Philanthropic Funding for COVID-19 Compared with Recent Disasters



Based on data, in U.S. dollars, collected for roughly six months following each disaster.

Source: [Center for Disaster Philanthropy: Philanthropy and COVID-19 in the First Half of 2020](#) (2020) and [Philanthropy and COVID-19: Measuring One Year of Giving](#) (2021)

THE PHILANTHROPIC RESPONSE TO COVID-19 IS GLOBAL



COVID, Global Outlook Fuel Boom in Chinese Philanthropy

The NonProfit Times | Donors | January 20, 2021

Public donated an additional £800m to charity during first lockdown

29 October 2020 by Stephen Delahunty

Covid-19 Solidarity Fund saved 280 000 South African households from hunger

2 December 2020 9:34 AM by [Kabous le Roux](#)

IMPACT OF COVID-19 IN EUROPE

- Since the pandemic struck, **nonprofits have ramped up their use of digital** to raise funds, engage with supporters and deliver services.
- **65%** of organisations have found **new ways to deliver services**, with an increase in those being offered online.
- 47% of organisations reported **an increase in money donated online**.

TOP 3 CHALLENGES CITED:

1

Raising
sufficient
funds

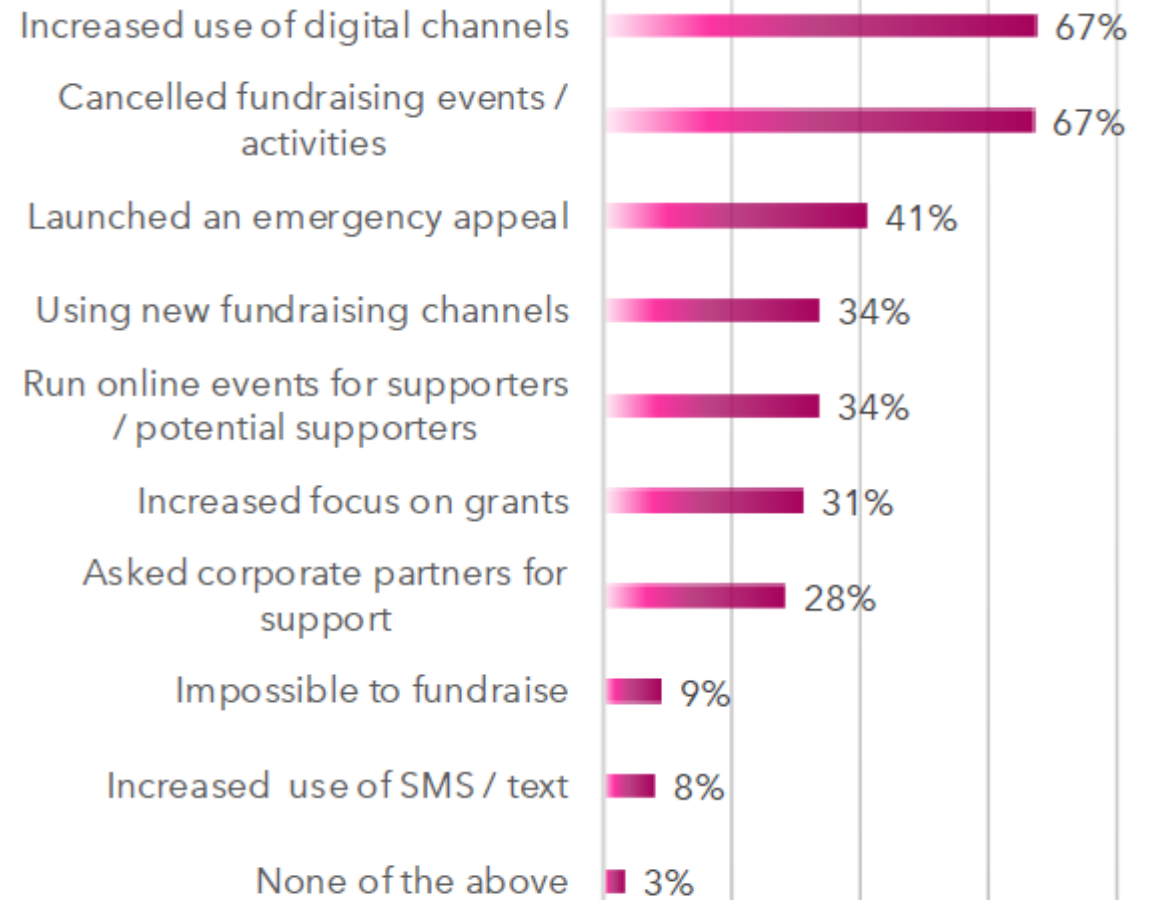
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Reaching and
engaging
supporters

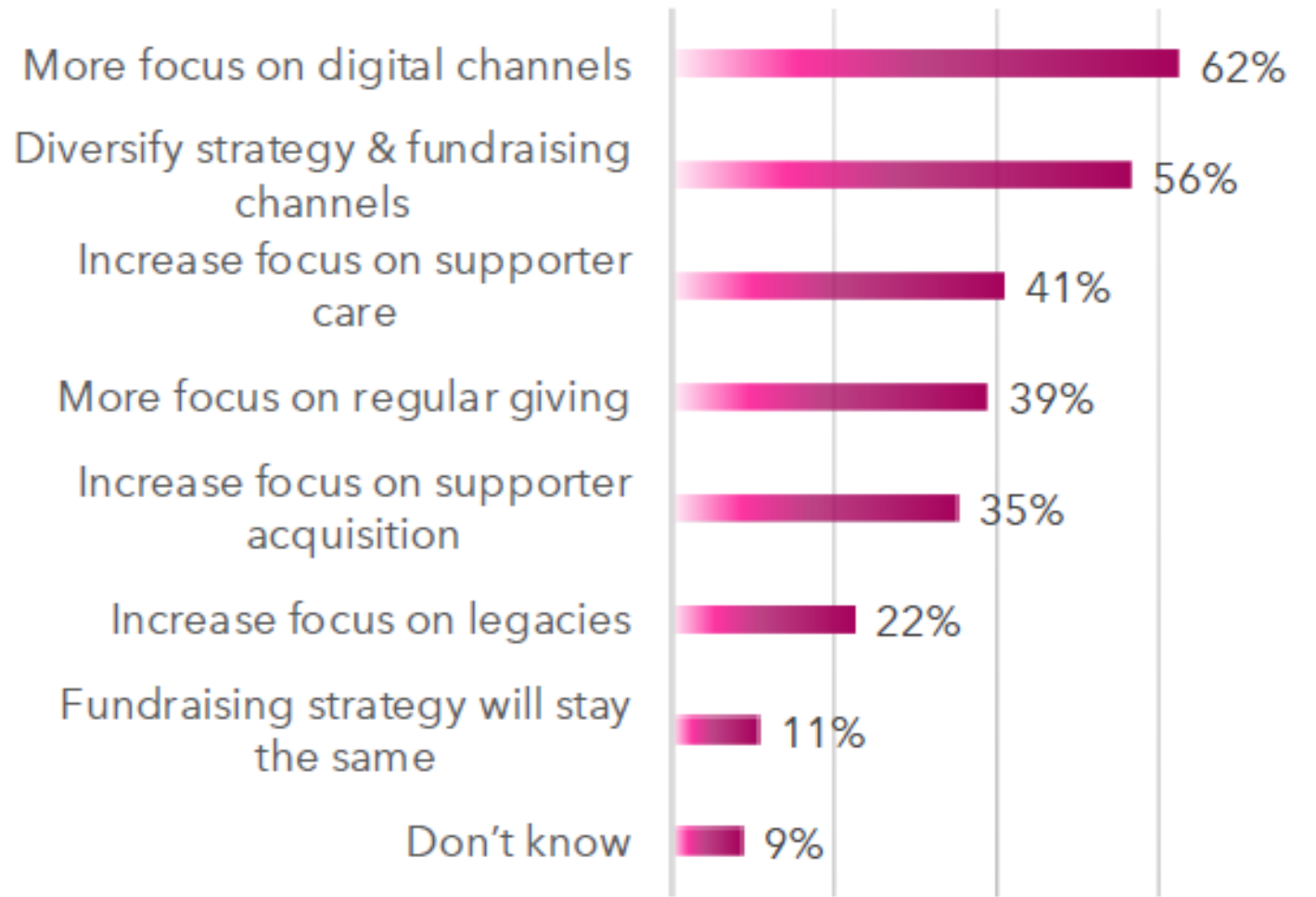
3

Increasing
digital skills

How did COVID-19 impact your fundraising?



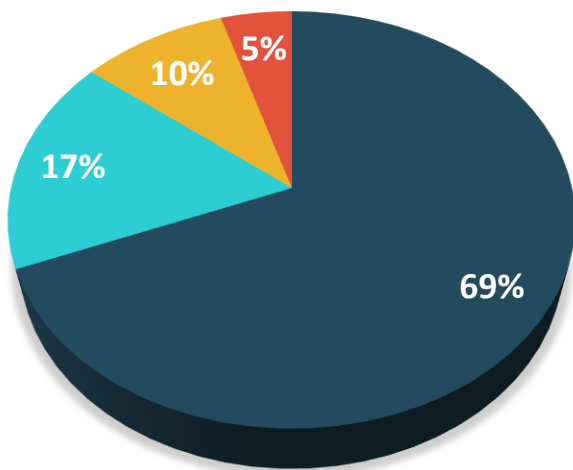
EUROPEAN ORGANISATIONS ANTICIPATE LASTING CHANGES



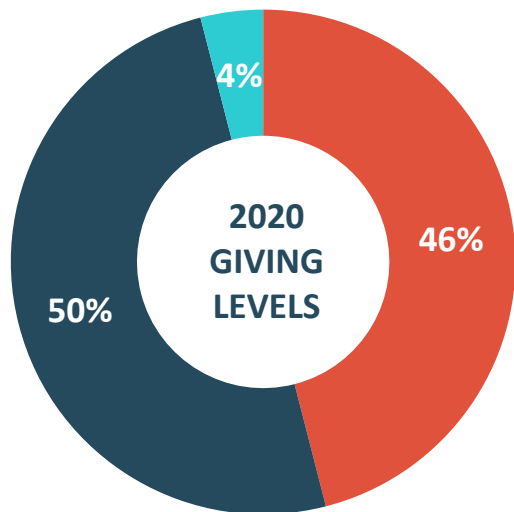
When asked how the pandemic was likely to impact future fundraising, only **11%** of organizations thought their strategy was likely to **stay the same**.

DONORS ARE STEADFAST AND LOYAL IN THEIR GENEROSITY

Americans give more than
\$1 billion a day.



9 out of 10 donors said they maintained
or increased their giving in 2020 as a result
of COVID-19 and its impact.



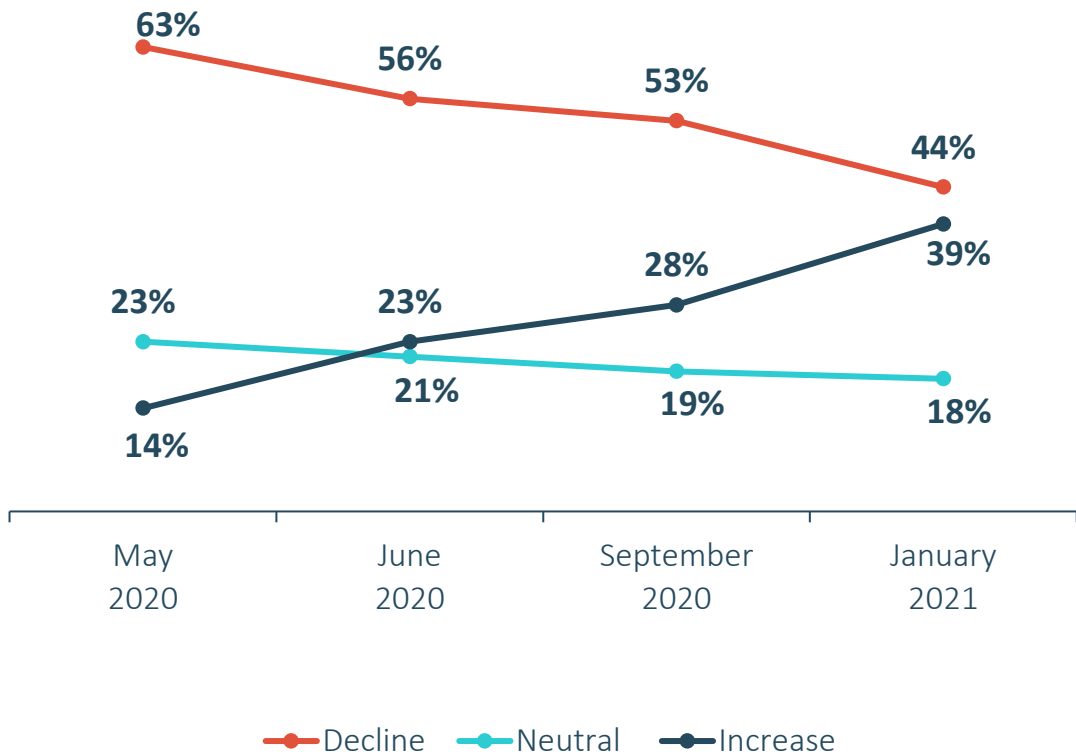
50%
I have given
about the same

46%
I have given
notably more

4%
I have given
notably less

NON-PROFIT FUNDRAISING IS IMPROVING OVER TIME

CCS Philanthropic Climate Survey:
Impact of COVID-19 on Your Nonprofit's Fundraising



Fundraising Effectiveness Project:
Overall Donations to Nonprofits



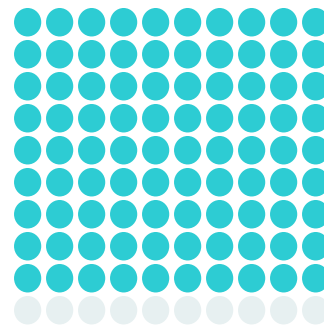
*growth in overall giving from
2019 to 2020*

INDIVIDUAL CHARITABLE GIVING IS COMING FROM A HIGHER CONCENTRATION OF WEALTHY HOUSEHOLDS

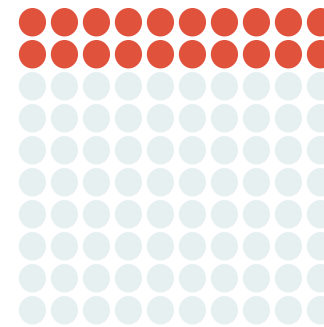
Nearly half of charitable giving is coming from the top 1%.



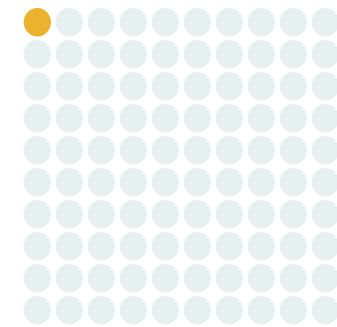
53%
of the general
population gives
(\$2,763 on average
annually)



90%
of wealthy
households give
(\$29,269 on average
annually)



20%
of households
provided 80% of
all giving by value



1%
of households
provided 45% of
all giving by value

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 2018 U.S. Trust Study of High Net Worth Philanthropy \(2018\)](#); [Blackbaud: Vital Signs Part 3: How Major Donors are Shaping Philanthropy \(2020\)](#)

*Wealthy defined here as having annual household income of \$200,000+ and/or a net worth of \$1,000,000+

VIRTUAL DONOR ENGAGEMENT IS INCREASINGLY THE NORM



21%

growth in online giving from
2019 to 2020

*Source: Blackbaud 2020 Charitable Giving
Report (February 2021)*



61%

of CCS survey respondents have
held an online fundraising event

*Source: CCS Philanthropic Climate Survey,
4th Edition (January 2021)*



56%

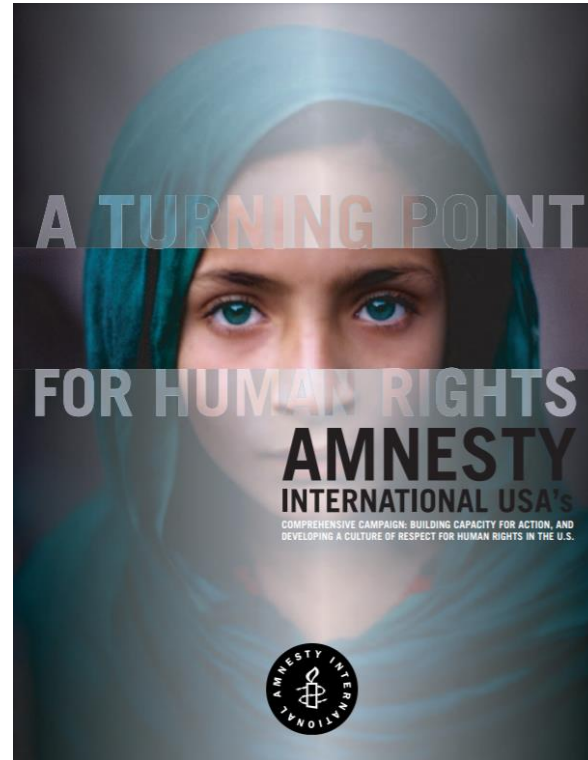
of CCS survey respondents have
requested a major gift virtually

*Source: CCS Philanthropic Climate Survey,
4th Edition (January 2021)*

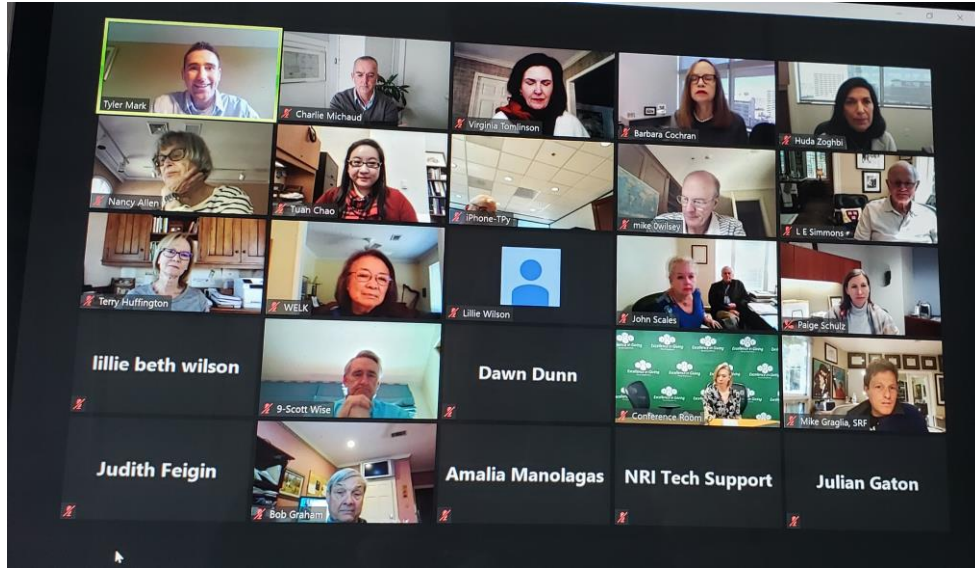
MAKING YOUR CASE FOR SUPPORT EFFECTIVELY

WHAT IS A CASE FOR SUPPORT?

The Case for Support is the statement of your cause explaining **what** your nonprofit does, **why** it's important and **why** people should support you.



MAKING THE CASE AS CEO: HIGH-LEVEL BRIEFINGS



A special briefing on Autism hosted by the Duncan NRI in Houston



Cathedral of St. John the Divine, NYC briefing with Former Prime Minister of Australia, Kevin Rudd

Conduct a regular series of Zoom briefings or online roundtables on relevant topics to raise your profile and more powerfully and consistently position your organization as a thought-leader.

MAKING THE CASE AS CEO: STRATEGIC MECHANISMS

The CEO's role (and opportunity!) is different from that of staff.



African leaders representing 300 million are seeking our support.

"IN HEALTH OR EDUCATION PROGRAMS, OR EVEN IN BUILDING A BRIDGE, WE DON'T NEED TO REPEAT SOMETHING THAT HASN'T WORKED SOMEWHERE ELSE."
ETHIOPIAN PRIME MINISTER HAILEMARIAM DESALEGN

"The AGI team has added significant value to my office in providing advice, tools and systems that have helped my team work more effectively. I have asked AGI to play a part in monitoring the implementation of the priority projects in the Economic Recovery Plan"
JOYCE BANDA, PRESIDENT OF MALAWI

"The work comes at a critical stage in Sierra Leone's development. I believe together we have an opportunity to ensure that Sierra Leone puts in place the policies, people and institutions to achieve real and lasting change."
ERNEST BAI KOROMA, PRESIDENT OF SIERRA LEONE



Nick Thompson,
AGI Chief Executive

Our donors designed a rapid action fund so that we can respond quickly and fully.

"THE RAPID ACTION FUND ALLOWS ME TO MAKE A COMMITMENT TO AFRICAN LEADERS THAT AGI WILL WORK ALONGSIDE THEM ON THEIR PEOPLE SEE THE RESULTS."
NICK THOMPSON, CHIEF EXECUTIVE, AGI

AGI knows from experience that speed, flexibility and the ability to stay the course in Africa is critical. So, in 2011, we designed a Rapid Action Fund with our donors. Contributions covered the early weeks of our work in a new country, or allowed us to deploy a team after an election, while we secured long term funds from less agile donors.

However, in some cases it has taken nearly two years - a third of a Presidential term - to negotiate and mobilise funds from the more traditional aid donors. While we'll seek to maintain at least half of our income from these sources, AGI's leadership is clear that this isn't a business model we can grow with.

Following a review with our donors, from 2014 AGI is focussed on securing a much larger Fund that enables us to make longer commitments to African leaders right from the start of a project. It means we stay focussed on the impact our governments seek, while remaining flexible, bold and independent.

Recent commitments have allowed us to:

- Start a new project in Senegal. We launched the project a week after our team were formally asked for support from the government
- Commit to fund a team in Sierra Leone for four years, as they develop the infrastructure needed to connect 200,000 people to the grid

MAKING THE CASE AS CEO: SPECIAL ENGAGEMENT

Establish a volunteer “International Council” and invite your best stewards to join it. It provides a substantive way of gathering stewards together and in the user-friendly terminology more likely to resonate with the media and others.



MAKING THE CASE AS CEO: BACKING THE WHOLE MISSION!



Anchor Investors



RECOMMENDATIONS AND NEXT STEPS

RECOMMENDATIONS AND NEXT STEPS



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 larger donors to give and get involved

THANK YOU!

For more information and resources, visit ccsfundraising.com



APPENDIX

THE CASE FOR SUPPORT

Case Elements

Context Setting

The Need

The Opportunity

The Plan

The Call to Action

Objectives

Establish credibility and showcase the distinct value proposition of your organisation

Outline a clear need that resonates with your audience

Introduce your organisation as a way to solve for this need

Clarify how the goal will be accomplished

Show impact and inspire the audience to see themselves as part of the solution

Guiding Questions

Why should I invest in your organisation?

What challenge does your organisation solve?

Why is this need urgent?

What will your organisation do?

What impact will it have on the community?

Why is this the right solution?

What is the fundraising goal?

How will that goal be achieved?
Over what timeline?

How can I participate?

What are the opportunities to be recognized?

Why should I invest in your organisation?

Your Case for Support makes a compelling argument as to why your organisation is best placed to solve for a specific need or problem and includes:

- **Credibility:** What statistics, data points, testimonials, and previous successes lend support to your case?
- **Leadership:** Who are the individuals involved and how have they demonstrated sound judgment and a compelling vision (e.g. senior leadership, trustees, major donors, etc.)?
- **Experience:** What experience do you have in implementing these programs? What makes you stand out from peer organisations?
- **Value for Money:** How do you maximize the investment made by your supporters?

The Need

What community or personal need is your organisation solving for? Why is this need urgent?

- A Strong Case Starts with Why:



- **Need:** Outline a clear need that you are responding to; seek to persuade rather than inform. Tell a story.
- **Urgency:** Clarify the urgency. Why do you need support now?
- **Implications:** What will happen if you are unable to mobilize these resources?

The Opportunity

What will your organisation do with donors' investment? What impact will it have? Why is this the right solution?

- **What Will You Do :** Connect your work with the desired outcomes. Use language that prospective donors care about and anticipate their questions; messaging is often informed through planning conversations.
- **Impact on Community:** What impact will your organisation have on the community?
- **Impact on Donor:** What will their investment leverage?
- **Inspiration Leads to Investment:** “This is the problem we’re solving...”
“This is what you help us accomplish...”

What is the financial goal? How will that goal be achieved? Over what time frame?

- **Establish a Goal:** Donors will be motivated to give when they are part of a larger effort driving toward a specific dollar amount. This helps motivate you and your team, too!
- **Share Who is Giving:** What progress have you made towards your goal? What percentage will need to come from philanthropy? The private sector? Individuals? New donors are more likely to invest alongside others who are giving.
- **Balance:** Strike a balance between specific needs and more general funding priorities.
- **Do the Legwork:** Fundraising plans often include a financial breakdown of how funds raised will be allocated and a clear roadmap to accomplishing the goal.

The Call to Action

How can a prospective donor participate? What are the opportunities for him/her to be recognized?

- **Establish a Personal Connection:** People give to people, and leadership that they trust.
- **Extend an Invitation:** Invite people to take part in your work by donating, as well as giving of their time and connections.
- **Recognize Donors:** Ensure meaningful stewardship and recognition opportunities commensurate with their level of investment.
- **Reiterate the Connection:** Make the connection between their gift and the impact they care about.
- **Make it Easy:** Create multiple pathways for people to give; encourage them to make multi-year commitment; allow them to set up monthly or annual payments.