



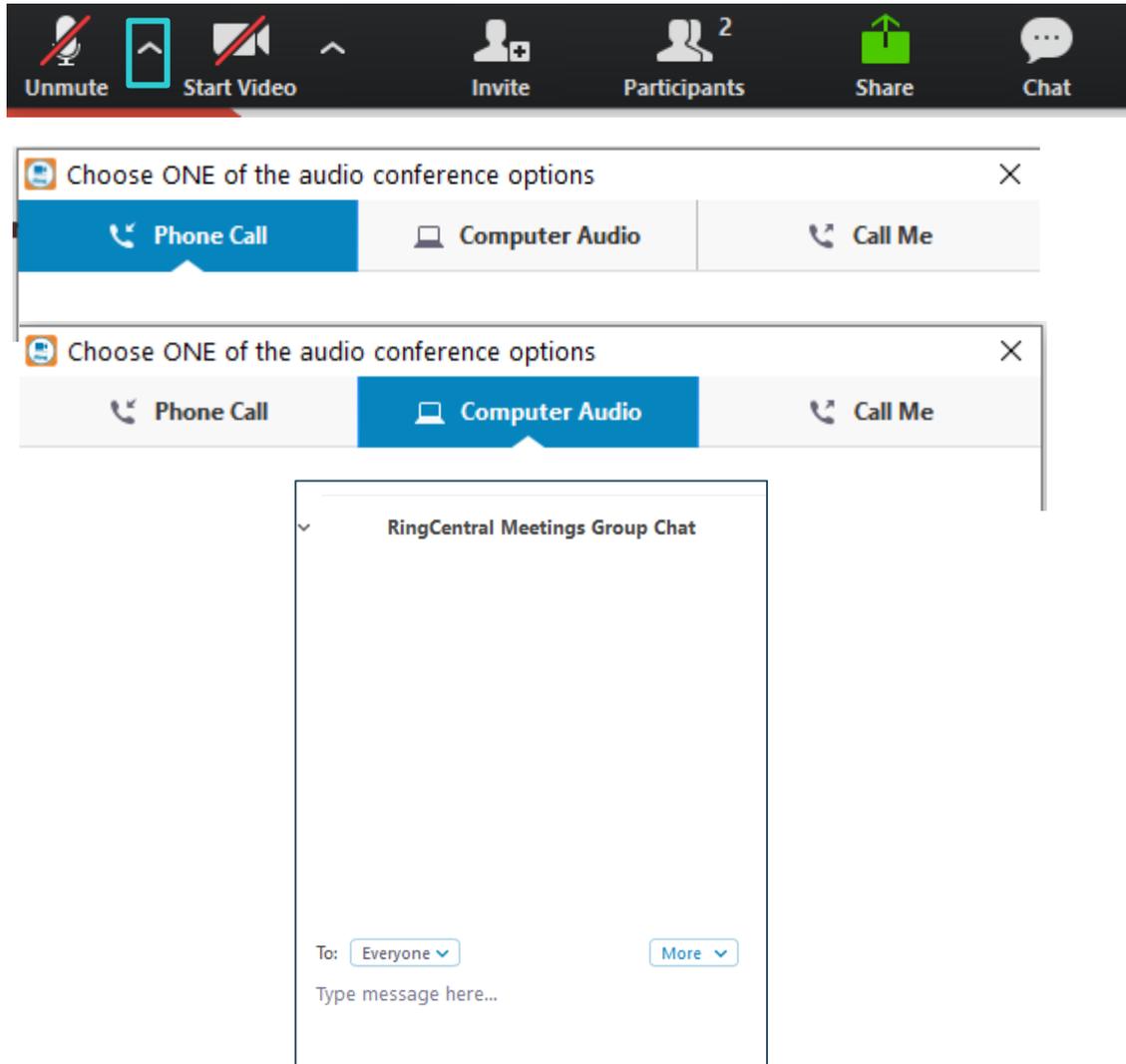
PRINCIPLES OF FUNDRAISING AT INDEPENDENT SCHOOLS

Navigating the Challenges Presented by COVID-19

CCS is a strategic fundraising firm. We partner with nonprofits for transformational change.



LOGISTICS



To join/switch audio:

- Choose “Computer audio” to use VoIP and listen through your computer.
- OR*
- Choose “Phone call” and dial using the information provided. International numbers available.

Throughout the webinar please type your questions here for discussion later.

TODAY'S PRESENTERS



Julie Siebel
Assistant Vice President
CCS Fundraising



Catherine Sun
Executive Director
CCS Fundraising

KEY QUESTIONS TO ADDRESS TODAY

1.

- How will we message annual fund support versus tuition? Can you make a compelling case for why families should continue to support the annual fund while continuing to pay tuition even though campus may not be fully operational? Please feel free to share your general thoughts on this subject.

2.

- What will be different and what will be the same with respect to how we talk to trustees about giving and philanthropy?

3.

- Where can alumni support have unique impact? Are there more creative engagement opportunities we have not previously considered under traditional/normal circumstances?

4.

- How might we need to reframe volunteer engagement and stewardship? Please share your thoughts and potential opportunities.

5.

- What is driving us during this time? How are we articulating urgency and how are we guiding families towards actionable next steps that result in a gift?

CONSIDERATIONS FOR ANNUAL FUND FUNDRAISING IN THE NEW ENVIRONMENT



TIMELESS PRINCIPLES FOR FUNDRAISING

Concerns about the impact of Coronavirus (COVID-19) underscore the nonprofit sector's vital leadership role in the welfare of our communities. In light of the current and rapidly evolving circumstances, CCS offers the following timeless fundraising principles to remember and reinforce:



1. Increase Communication



2. Communicate Financial Impact



3. Leverage Technology



4. Consider Special Fundraising Initiatives



5. Consider Special Briefings



6. Avoid Wholesale Cancellation of Fundraising Plans



7. Develop a Short-Term Action Plan



8. Reaffirm Your Mission and Impact

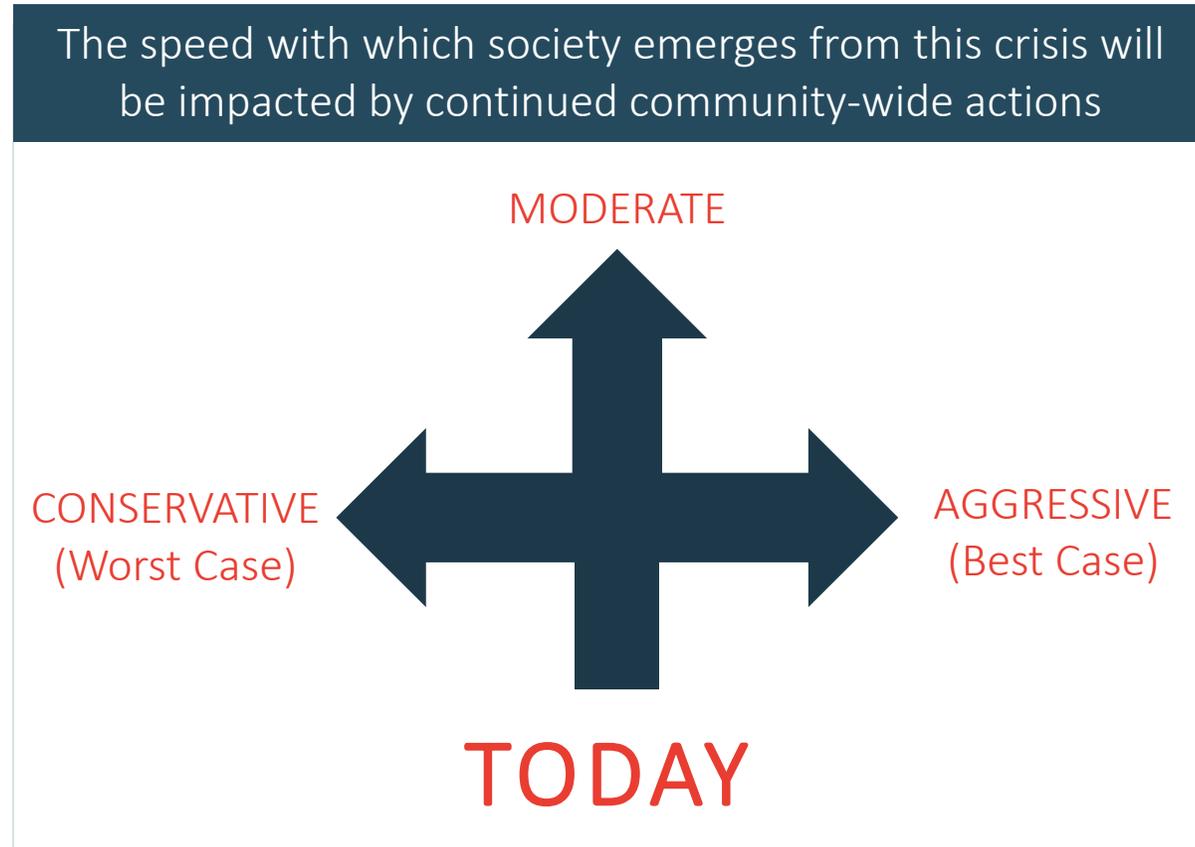


9. Motivate Your Stakeholders



10. Show Empathy and Concern for Your Stakeholders

RE-EMERGENCE SCENARIOS



KEY CONSIDERATIONS

- Some of the most Aggressive models predicted a **beginning of re-emergence during Q2 of 2020**
- More Conservative models suggest that **real re-emergence will not happen until Q2 of 2021**
- Your own organization will have to **consider sector-specific and region-specific elements** to craft your own scenario plans

SCENARIO PLANNING

HOW TO EVALUATE: "WHAT IF..."



Gather key decision makers, including a trusted board member or two



Identify and assess critical streams of philanthropic revenue over the next 6-9 months (e.g., major gifts, grants, fall events, fall appeals)



Identify a best case, worst case, and middle ground scenario that applies to your sector, region, and organizational dynamics



Assign primary decision-makers for each revenue stream

COVID-RELATED FUNDRAISING EVOLUTION



I. IMMEDIATE CRISIS

CHARACTERISTICS:

- Chaotic
- Urgent
- Fast moving while immobile

AREAS OF FOCUS:

- Continued Operations
- Special Appeals



II. STABILIZATION

CHARACTERISTICS:

- Methodical and slowing
- Planful

AREAS OF FOCUS:

- Program modifications
- Stakeholder engagement



III. RE-EMERGENCE

CHARACTERISTICS:

- Resembling pre-COVID

AREAS OF FOCUS:

- Campaigns and fundraising plans
- Metrics and evaluation

CORE FUNDRAISING ELEMENTS IN EACH STAGE



CASE

Rationale behind the initiative – the “why”



LEADERSHIP

Those who advocate for the cause



PROSPECTS

Organization’s natural constituency



PLAN

Strategy and tactics for campaign

STAGES OF FUNDRAISING EVOLUTION

| | I. IMMEDIATE CRISIS | II. STABILIZATION | III. RE-EMERGENCE |
|------------------|---|--|--|
| CASE FOR SUPPORT | <ul style="list-style-type: none"> Immediate Action Urgent funding requirements | <ul style="list-style-type: none"> Interim funding plan and Case for Support Short-term funding impact and benefit | <ul style="list-style-type: none"> Establish modified or new strategic priorities Draft Case for Support for the foreseeable future |
| LEADERSHIP | <ul style="list-style-type: none"> Special emergency working group Stakeholder outreach | <ul style="list-style-type: none"> Assess crisis impact and recast short-term priorities Broaden role in fundraising | <ul style="list-style-type: none"> Reconstitute Development Committee Reorganize fundraising leadership structure to support plan |
| PROSPECTS | <ul style="list-style-type: none"> Segment by giving level and relationships Determine the prospects most viable for immediate requests | <ul style="list-style-type: none"> Reprioritize prospect pool Establish individual plans | <ul style="list-style-type: none"> Full donor base review Screen, model, prioritize |
| PLAN | <ul style="list-style-type: none"> Intensify communication: connect, inform, and thank Implement special appeals to select donors and all audiences | <ul style="list-style-type: none"> Survey donors Design strategies for each donor segment Offer short term gift payment options | <ul style="list-style-type: none"> Rebuild capacity to support future efforts Reassess goal, timing, & case elements of major campaign |

KEY QUESTIONS TO ADDRESS TODAY

1.

- How will we message annual fund support versus tuition? Can you make a compelling case for why families should continue to support the annual fund while continuing to pay tuition even though campus may not be fully operational? Please feel free to share your general thoughts on this subject.

2.

- What will be different and what will be the same with respect to how we talk to trustees about giving and philanthropy?

3.

- Where can alumni support have unique impact? Are there more creative engagement opportunities we have not previously considered under traditional/normal circumstances?

4.

- How might we need to reframe volunteer engagement and stewardship? Please share your thoughts and potential opportunities.

5.

- What is driving us during this time? How are we articulating urgency and how are we guiding families towards actionable next steps that result in a gift?

Q&A



THANK YOU

Aashika Patel
Corporate Vice President
CCS Fundraising
apatel@ccsfundraising.com

Julie Siebel
Assistant Vice President
CCS Fundraising
jsiebel@ccsfundraising.com

Catherine Sun
Executive Director
CCS Fundraising
csun@ccsfundraising.com

