



# RAISING PHILANTHROPIC CAPITAL IN UNCERTAIN TIMES:

*TIMELESS PRINCIPLES FOR FUNDRAISING*

APRIL 29, 2020

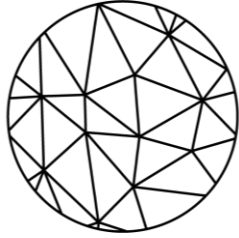
# Welcome

As you settle in, please make sure to:

- Turn your camera on and mute your mic; but be ready to share in small groups during the second half of the webinar
- Take a moment to breathe and arrive
- Introduce yourself in the chat with your name, pronouns, and where you're joining from

# Agenda

Welcome & Introductions	11:30 am – 11:35 am
Understanding Today's Landscape	11:35 am – 11:45 pm
Timeless Principles for Fundraising	11:45 am – 12:00 pm
Small Group Discussion	12:00 pm – 12:25 pm
Next Steps	12:25 pm – 12:30 pm



# The Center for **Social Impact Strategy**

The Center for Social Impact Strategy **equips, trains** and **connects** a thriving community of social innovators committed to making **lasting social impact**.

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## Recent CSIS Virtual Convenings:

- Routine Reset for Social Impact Practitioners
- Community Building + Happy Hour
- Adapting in the Times of COVID-19: A Workshop for Impact Organizations - *in partnership with Cafe Momentum*

# The CCS Team



**Elizabeth Abel**

Vice President

MS NPL, SP2; Lecturer at SP2

NPL Alumni Association Board Member



**Jordana Cohen**

Executive Director

MS NPL, SP2

NPL Alumni Association Board Member



**Greg Hagin**

Managing Director

MBA, Wharton

Lecturer at SP2 & Wharton



**Casey May**

Associate Director

MSW & MS NPL, SP2



**Carolyn McLaughlin**

Assistant Vice President

MS NPL, SP2



**Chloe Singer**

Senior Director

MS NPL, SP2

# About CCS

**73**

**YEARS**

Founded in 1947, CCS has become the most widely recommended firm in the field

**15**

**OFFICES**

CCS has 15 offices and staff located all over the world

**26**

**PRINCIPALS & SENIOR EXECUTIVES**

Experienced executives with extensive regional, national and international experience

**375+**

**PROFESSIONAL STAFF**

The largest and most experienced staff of fundraising professionals among leading firms

**100%**

**PERMANENT STAFF**

CCS has the best skilled, trained, motivated, and compensated staff in the field

**10,000**

**SATISFIED CLIENTS**

CCS has worked closely with 40% of 100 best performing charities

**90%**

**REPEAT BUSINESS/REFERRALS**

Ninety percent of CCS business comes from repeat business or direct referral from satisfied clients

**7**

**CORE SERVICES**

Resource development planning, feasibility studies, development assessments and audits, capital campaigns, major gifts, endowment, research and data analytics

**20 years**

**MINIMUM EXECUTIVE EXPERIENCE**

CCS has the strongest and most experienced executive team responsible for many of the most successful fundraising programs in history

**\$100M+**

**UNPRECEDENTED GIFTS**

Current and recent clients have received transformational gifts including more than 20 of \$100M+

**95%**

**SUCCESS RATE**

CCS has achieved unprecedented success in fundraising for human services, education, health, faith, environment, science, arts and culture, associations, and policy

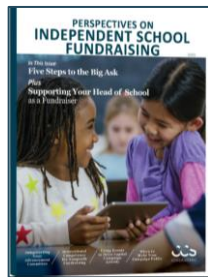
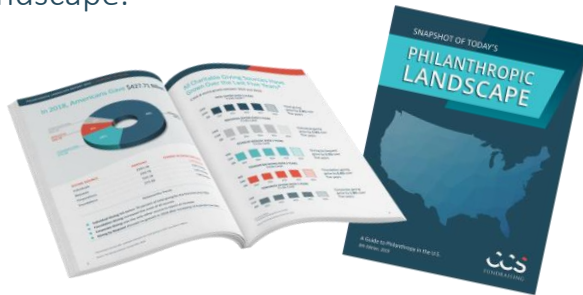
**10x**

**ROI**

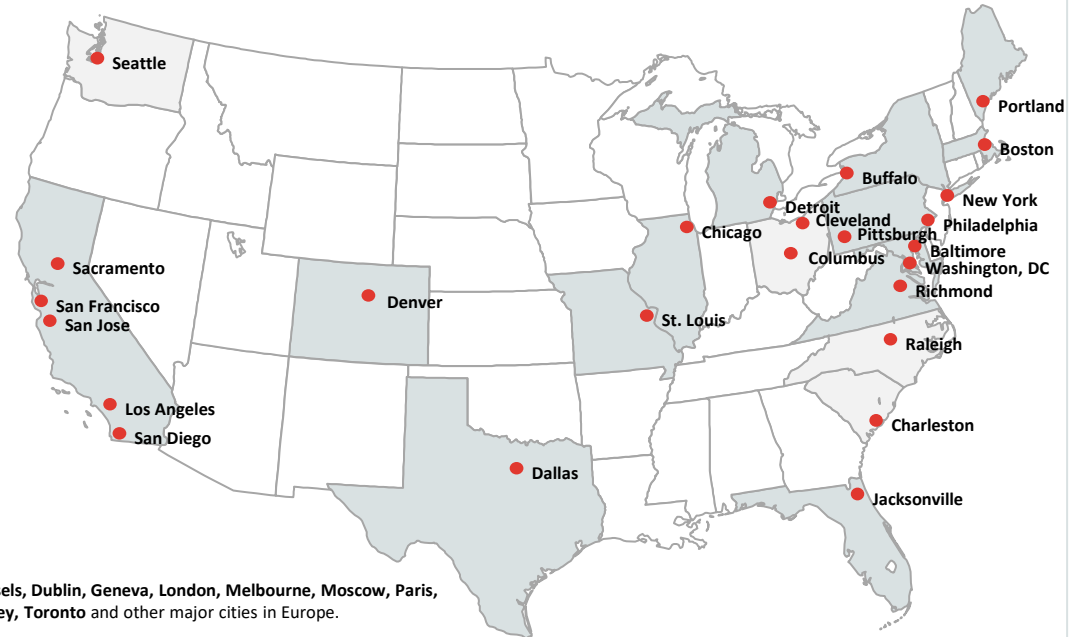
CCS client partners experience five to more than ten times return on their investment in CCS services

# CCS Thought Leadership

CCS authors publications, articles, and blogs on emerging trends in our philanthropic landscape.



CCS regularly convenes nonprofit leaders to network, share experiences, and discuss effective strategies for growing fundraising income and navigating the philanthropic climate.



CCS frequently participates in local, national, and international conferences and events.

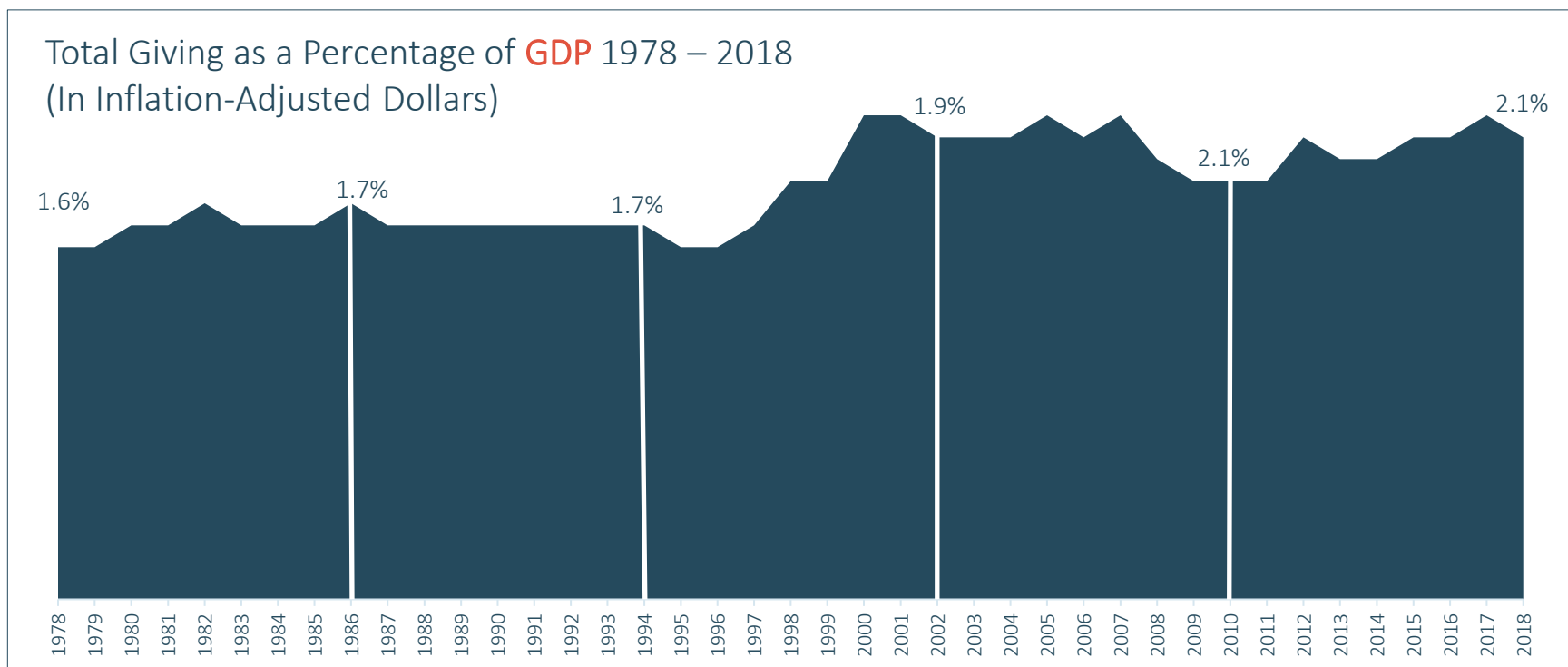


# What Would You Like to Gain From This Call?





# Historical View



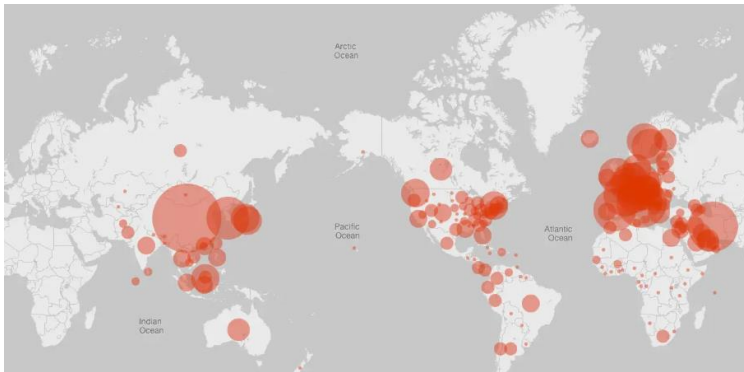
Research has found a statistically significant correlation between changes in total giving and changes in **Standard & Poor's 500 Index** (S&P 500) values. The direction of change and robustness of growth in total giving generally lags slightly behind the S&P 500.

Based on over 40,000 conversations CCS has conducted with nonprofit stakeholders and emerging prospects since 2011, **tax benefit** and financial relief ranks 7th (out of 7 motivating factors) for why people give.

# Current Complications

## Public Health Crisis

Confirmed Cases	Total Deaths	Total Recovered
3,060,152	212,056	905,662



## Social Distancing

Zoom announced last week that around **200 million daily** meeting participants used its services in March, up from a maximum daily average of 10 million in December.

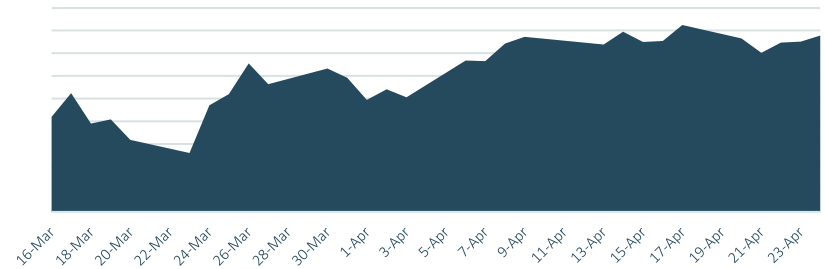
Around **90,000 schools in 20 countries** were among those using Zoom.

## Market Volatility and Looming Recession

Goldman Sachs Projected on March 31:

2020 Q1 GDP Drop <b>9%</b>	2020 Q2 GDP Drop <b>34%</b>	2020 Q3 GDP Rise <b>19%</b>
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### DJIA – Recent Activity



## Government Response

- CARES act providing over \$2 trillion in economic relief to the American workers, families, and small businesses.
- Varied levels of coordination on response between city, state, and federal governments.
- Different viewpoints on phased plans to reopen economy.

# Encouraging Philanthropic Response



**\$8 Billion**  
(and growing!)

Corporate  
Response

Individual  
Philanthropists

Foundation Response

New Collaborative  
Initiatives

## What Stands Out?

Donors are funding programs and areas that were not previously high priorities.

Philanthropists are providing:

- Food for hospital workers
- PPE
- Support for nonprofit employees
- Support for the initiatives of their beloved organizations responding in their own way to the crisis

# Philanthropists Meeting The Moment

Twitter CEO **Jack Dorsey** pledged **\$1 billion** for COVID-19 relief. The pledge represents about 28% of his wealth.

**Bill & Melinda Gates** have given **\$255 million** to COVID-19 efforts, including founding the COVID-19 Therapeutics Accelerator.

**Azim Premji** has given to **\$134 million** to humanitarian aid and health care.

**Michael and Susan Dell** have committed **\$100 million** to global relief efforts.

**Jeff Bezos** gave **\$100 million** to Feeding America's COVID-19 Response Fund.

**Michael Bloomberg** donated **\$40 million** to fight the spread of COVID-19 in Africa and low- and middle-income countries around the world.

**Mark Zuckerberg** and **Priscilla Chan** gave **\$25 million** to COVID-19 Therapeutics Accelerator

**Jack Ma**, retired Alibaba founder and executive chairman, gave **\$14.9 million** towards developing a vaccine.

Spanx Founder and CEO **Sara Blakely** gave **\$5 million** to female entrepreneurs for assistance amid COVID-19.

# Philadelphia's Philanthropic Response

## PHL COVID-19 FUND

### COLLABORATION BETWEEN

THE  
PHILADELPHIA  
FOUNDATION



United Way  
of Greater Philadelphia  
and Southern New Jersey



### PURPOSE

The PHL COVID-19 Fund was created to **provide aid to nonprofits** working to respond to the pandemic's impact throughout the **Greater Philadelphia Region**.

### RESULTS

**3,000+** individuals donated. **\$12 million+** raised.  
Lead contributors include:



United Way  
of Greater Philadelphia  
and Southern New Jersey



THE  
PHILADELPHIA  
FOUNDATION

## PHILADELPHIA COVID-19 SMALL BUSINESS RELIEF FUND

### ADMINISTERED BY



### PURPOSE

The Fund was a **\$9 million grant and loan initiative** for micro and traditional small business enterprises.

### RESULTS

One week after March 23 launch, officials closed applications for two tiers of relief efforts due to high demand and limited resources.

As of April 15,  
**all applications are closed.**

# Philadelphia's Philanthropic Response

## COVID-19 COMMUNITY INFORMATION FUND

### PURPOSE

The **\$2.5 million** Fund was created to ensure that communities in the Philadelphia area have **access to reliable news and information** throughout and after the coronavirus pandemic.

### CREATED BY



The Knight-Lenfest  
Local News  
Transformation Fund

## PHILADELPHIA EMERGENCY FUND FOR STABILIZATION OF EARLY EDUCATION

### PURPOSE

The Fund launched at **\$7 million** and was created to **support Philadelphia childcare providers** who are struggling to sustain their businesses through closures caused by COVID-19.

### CREATED BY



Vanguard

## COVID-19 ARTS AID PHL

### PURPOSE

The Fund is focused on the arts and culture sector in the Philadelphia region. The Fund launched at **\$3.45 million**, led with \$2.5 million from the William Penn Foundation.

### CREATED BY



# 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:

**Increase  
Communication**



**Avoid Wholesale  
Cancellation of  
Fundraising Plans**



**Reaffirm Your  
Mission and  
Impact**



**Develop a Short-  
Term Action Plan**



**Leverage  
Technology**



**Motivate  
Stakeholders**



**Share  
Philanthropic  
Information**



**Consider Special  
Briefings**

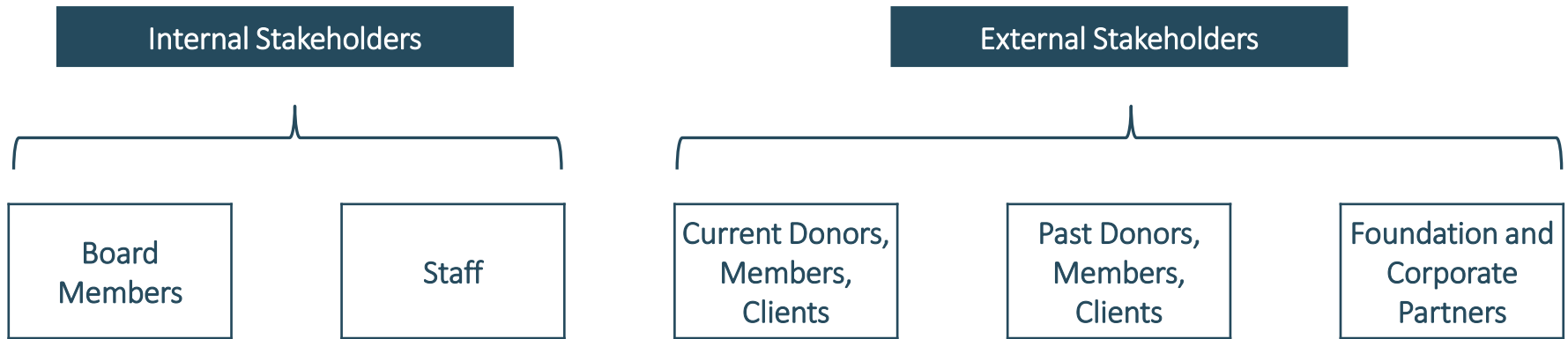


**Show Empathy  
and Concern**



# Increase Communication

Keep your stakeholders fully informed and deeply engaged. Donors and stakeholders are interested in how organizations are affected by the current situation, and what actions are being taken.



Utilize targeted, tailored messaging through video calls, phone calls, email, text, and/or mail



# Avoid Wholesale Cancellation of Fundraising Plans

Adhere to your overall fundraising plans and strategies, with reasonable adjustments to your day-to-day meetings, events, and activities, depending on your local circumstances.

Event	Alternate Option
Donor Lunch	Donor video or phone call
Weekly Team Meeting	Zoom meeting, shared Google document, daily phone calls
Forum/Conference	Webinar with emphasis on chat and polling features to increase interaction
Gala/Fundraising Event	Online fundraising page/silent auction, request to convert tickets to donation, share creative and relevant content to registrants that demonstrates your organization's mission through email and on website

# Reaffirm Your Mission and Impact

Reaffirm your organization's mission and continuously remind donors of the impact of your work. If you have a special role to play in the current public health issue, explain it.



Tailor your organization's messaging to demonstrate how your values, mission, and vision align with and are relevant to the current circumstances

# Develop a Short-Term Action Plan

Develop a plan of action, including a communications plan over the next several weeks, featuring an outreach initiative of personal calls and emails to key donors and friends.

Sample 30-60-90 Plan

Task		Month 1				Month 2				Month 3			
Week		Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4
1	Conduct video calls with all Board members												
2	Send email to entire database with updates												
3	Make personal calls to donors												
4	Make personal calls to key stakeholders												
5	Conduct webinar with donors and key stakeholders												
6	Write and post blog regarding current landscape												
7	Share updates on social media												

# Leverage Technology

Find ways to more effectively incorporate video conferencing, podcasts, or virtual briefings that make meetings more dynamic and create more personal experiences regardless of distance. Consider how social media or other virtual platforms can serve as temporary alternatives to in person convenings.



# Motivate Stakeholders

Redouble efforts to help motivate trustees, administrative leadership, and staff by reminding them of the resilience of philanthropy in difficult times. Donors who feel engaged and connected will continue to support their beloved institutions, especially in times of crisis.



# Share Philanthropic Information

Share the latest philanthropic information to both motivate leadership and temper expectations.

## Chronicle of Philanthropy

Wide range of content for the nonprofit sector, with topics spanning from corporate support opportunities to technology advancements

## Stanford Social Innovation Review

Top-notch content that provides fresh perspectives on social entrepreneurship and nonprofit fundraising

## NonProfit Times

Popular resource for best practices on how to manage your organization

## Nonprofit Quarterly

Range of topics regarding news and trends, organizational management, and development

## Philanthropy News Digest

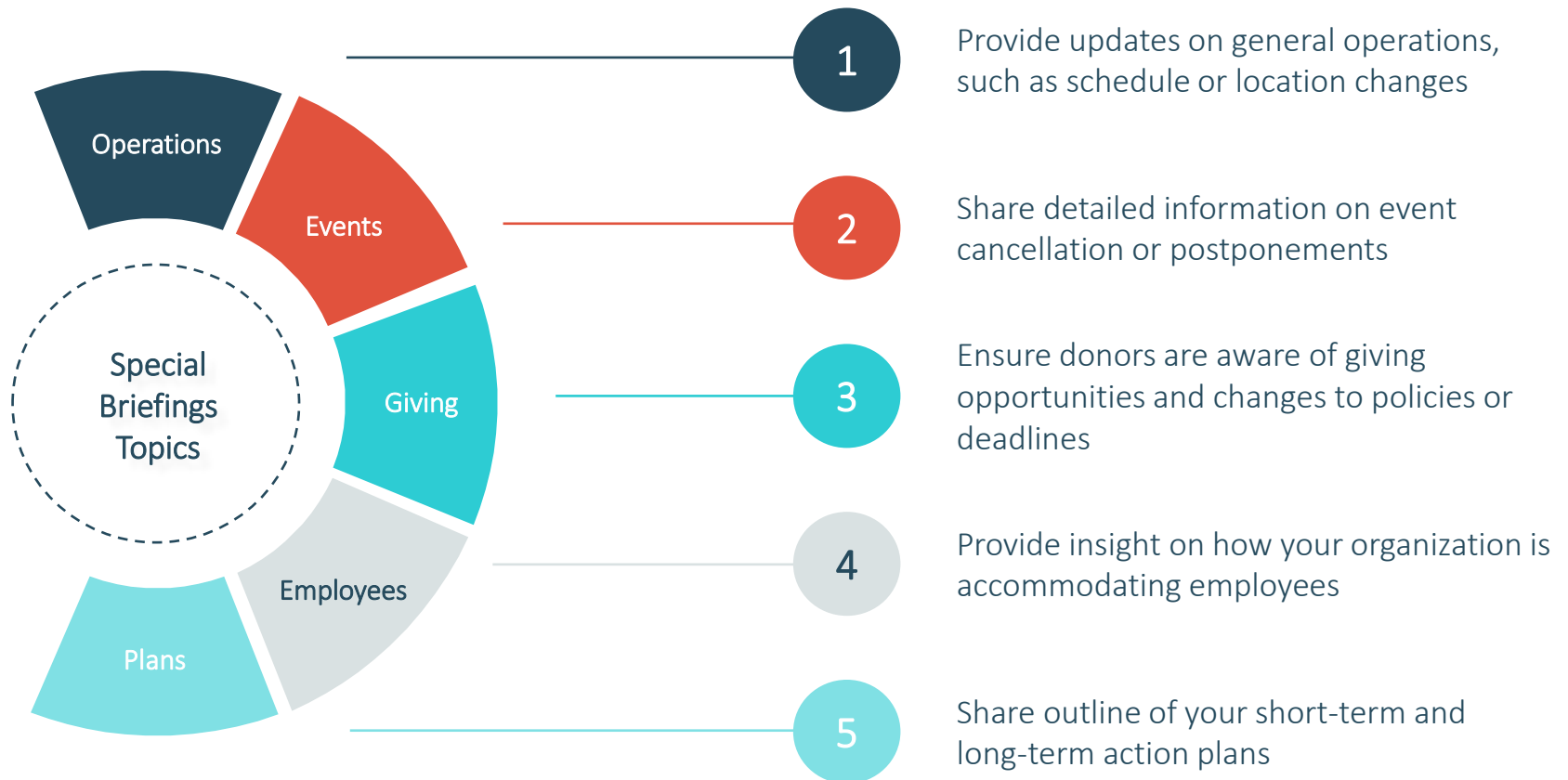
Compilation of relevant articles from the philanthropic sector

## CCS Fundraising Blog

Experts provide practical insights from the field

# Consider Special Briefings

Consider hosting a series of teleconference briefings with stakeholders on issues pertinent to the current situation. Donors and constituents are interested in knowing how a nonprofit is responding to the current situation.



# Show Empathy and Concern for Your Stakeholders

We have all been impacted by COVID-19 in some way. Giving is a two-way street and donors want to know that you value them and are concerned about their welfare. Offer any resources that might be helpful to your stakeholders.

## Four Qualities of Empathy

Putting yourself in  
someone else's shoes

Staying out of judgement  
and listening

Recognizing emotion in another  
person that you have maybe felt  
before

Communicating that you can  
recognize that emotion



# Group Discussion Questions

1. How do these principles resonate with you?
2. What strategies and tactics have you implemented that have been effective in pivoting to meet this moment?
3. What is your biggest priority today? This week? This quarter?

# Join Our Next Conversation

- Next Meeting: Wednesday, May 13, 11:30am – 12:30pm EDT
- Next Topic: How Will Your Mission Meet This Moment?
  - How will you demonstrate purpose?
  - How will you demonstrate momentum?
- Please provide your thoughts and feedback regarding today's session in [our survey](#).
- We will follow up with the call recording and any resources you share in the feedback survey.
- For additional information on fundraising strategies during COVID-19, please visit: <https://ccsfundraising.com/strategies-during-covid-19/>.

# Thank You

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