ROLE OF NONPROFIT CEOs & BOARDS IN THE NEW NORMAL

Association of Development Officers
“Ask the Expert”
Wednesday, October 14, 2020
8:45 AM to 11 AM

Thomas Kissane
Principal & Managing Director
CCS
How can you leverage your CEO and board member’s expertise and talents for your philanthropic needs, especially amidst COVID-19?

What are the ways that staff can partner with CEOs and board members to maximize engagements and position for fundraising success?

What is the path for volunteers to actively participate in the cultivation, solicitation, and stewardship of prospects?
LEVERAGING TALENTS & EXPERTISE

**PROFESSION**

- Lawyer
- Financial Advisor
- Public Relations
- Entrepreneur
- Hospitality

**DEVELOPMENT ROLE**

- Approve by-laws, governance issues
- Planned giving, Donor Advised Funds (DAFs)
- Codify editing, pro-bono design work, COVID-19 messaging
- Develop sales messaging, advise on trends
- Host small (virtual) events
## Partnering to Maximize Engagements

### Development Priorities

- **Donor Discovery**: Offer prospects, vet names
- **Introduce**: Make call, send intro email
- **Cultivate**: Attend / Host event, coffee
- **Solicit**: Make strategic, specific ask
- **Steward**: Thank you call / note, engage

### CEO / Board Role

- Research, Circulate, Share New Donors
- Provide script / sample
- Coordinate, provide background info
- Rehearse, provide script, proposal
- Keep informed, send updates

### Development Staff Role
ENCOURAGING PARTICIPATION IN THE PROSPECT PIPELINE

Identify:
- Introduce new prospects by:
  - Discovering and identifying donors through a review of institutional records
  - Special initiatives / events (e.g.: COVID-19 Appeals, Racial Justice Initiatives, etc.) can often result in increased donor acquisition
  - Determine prospect’s level of interest, involvement, and capacity through research
  - Cultivate the prospect in a variety of methods and in a set timeframe

Qualify:

Cultivate:

Steward:

Ask:

Brief:

Relationship Management:
CALLS

- Touch base
- Thank
- Remind
- Introduce
- Invite

“VISITS”

- Coffee
- Breakfast
- Lunch
- Dinner
- Tour facility
- Attend event

ASKS

- Solicitation
- Follow-Up

Can all be accomplished virtually.
THANK YOU

THOMAS KISSANE
Principal & Managing Director, CCS
tkissane@ccsfundraising.com

For additional information about strategies during COVID-19, please visit:
RECOMMENDATIONS FOR THE CURRENT MOMENT IN PHILANTHROPY

- What we know and can control vs. what we don’t know and can’t control
- Timeless principles for fundraising remain effective
- Reaffirm your brand, reinforce your impact, and be prepared to pivot
- Redouble efforts to engage and motivate your stakeholders
- Harness powerful events to motivate year-end giving
- Implement an integrated philanthropic approach for 2021
- As you look to the future: Remain empathetic, dynamic, responsive, and aware
INSIGHTS ON THE CURRENT AMERICAN PHILANTHROPIC LANDSCAPE

- Americans are steadfast and loyal in their generosity
- Philanthropy is resilient during times of crisis
- Charitable giving is coming from a higher concentration of wealthy households
- More Americans are volunteering
- COVID-19 philanthropy far exceeds funding for other recent disasters
- Foundations and corporations have been incredibly responsive
- Racial justice groups have received millions in donations

Amidst uncertainty, donor behaviors are shifting

Amidst uncertainty, nonprofits are staying the course, but remaining flexible