

DENVER ACADEMY



THINK BIG
Strategies to Enhance School Fundraising

ACIS DEVELOPMENT GATHERING | FEBRUARY 10, 2023



PRESENTERS



**MARK
TWAROGOWSKI**

Head of School
Denver Academy



POLLY BREIT

Senior Vice President
CCS Fundraising

ABOUT CCS FUNDRAISING

Celebrating 75 years of transformational partnerships with nonprofits



Leading experts in campaign and development strategy for more than 75 years



Experienced across nonprofit sectors and regions engaging with 700+ partners annually



500+ full-time professional staff plans, implements, and manages fundraising projects.

INDEPENDENT SCHOOL PARTNERSHIPS

130+

PARTNERS
ANNUALLY

160+

NEW PROJECTS
CONDUCTED

\$23.7M

AVERAGE
CAMPAIGN
GOAL

CLIENTS ACROSS

3

CONTINENTS

OUR SERVICES



CAMPAIGN
MANAGEMENT



PLANNING
STUDIES



ANNUAL FUND
SUPPORT &
LEADERSHIP



INTERIM
ANNUAL FUND
DEVELOPMENT



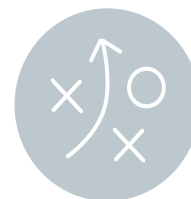
INTERIM
DEVELOPMENT
MANAGEMENT



DATA
ANALYTICS,
SYSTEMS, &
RESEARCH



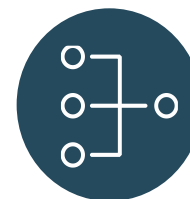
STAFF
ASSESSMENTS &
ORGANIZATIONAL
AUDITS



STRATEGIC
PLANNING



TRAINING &
PROFESSIONAL
DEVELOPMENT



SPECIALIZED
DEVELOPMENT
PROJECTS



01

OVERVIEW OF
PHILANTHROPIC
LANDSCAPE

02

KEYS TO
ENHANCING
FUNDRAISING

03

PEER PERSPECTIVE
FEATURING
DENVER ACADEMY

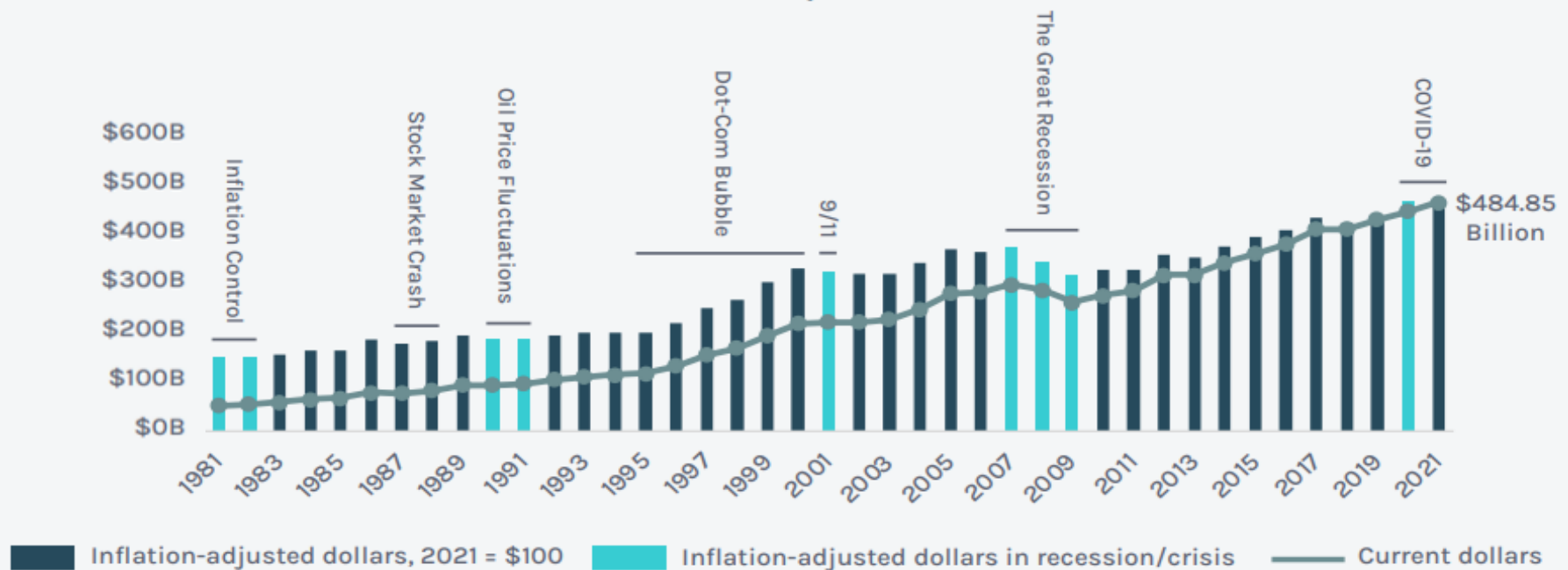


THE PHILANTHROPIC LANDSCAPE

US CHARITABLE GIVING INCREASED 7% SINCE 2019

Giving USA estimates that charitable giving in the United States reached **\$484.85** billion in 2021. On average, US individuals, corporations, and foundations donated \$1.33 billion per day. Giving has increased 7% since 2019.

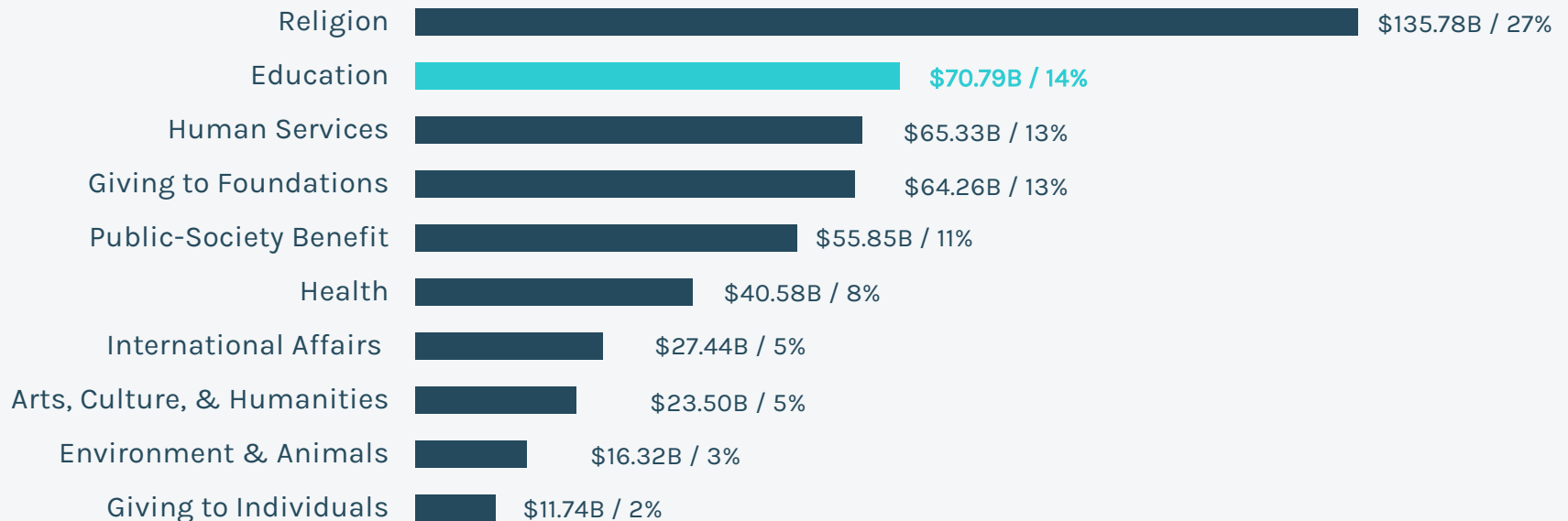
TOTAL GIVING, 1981-2021



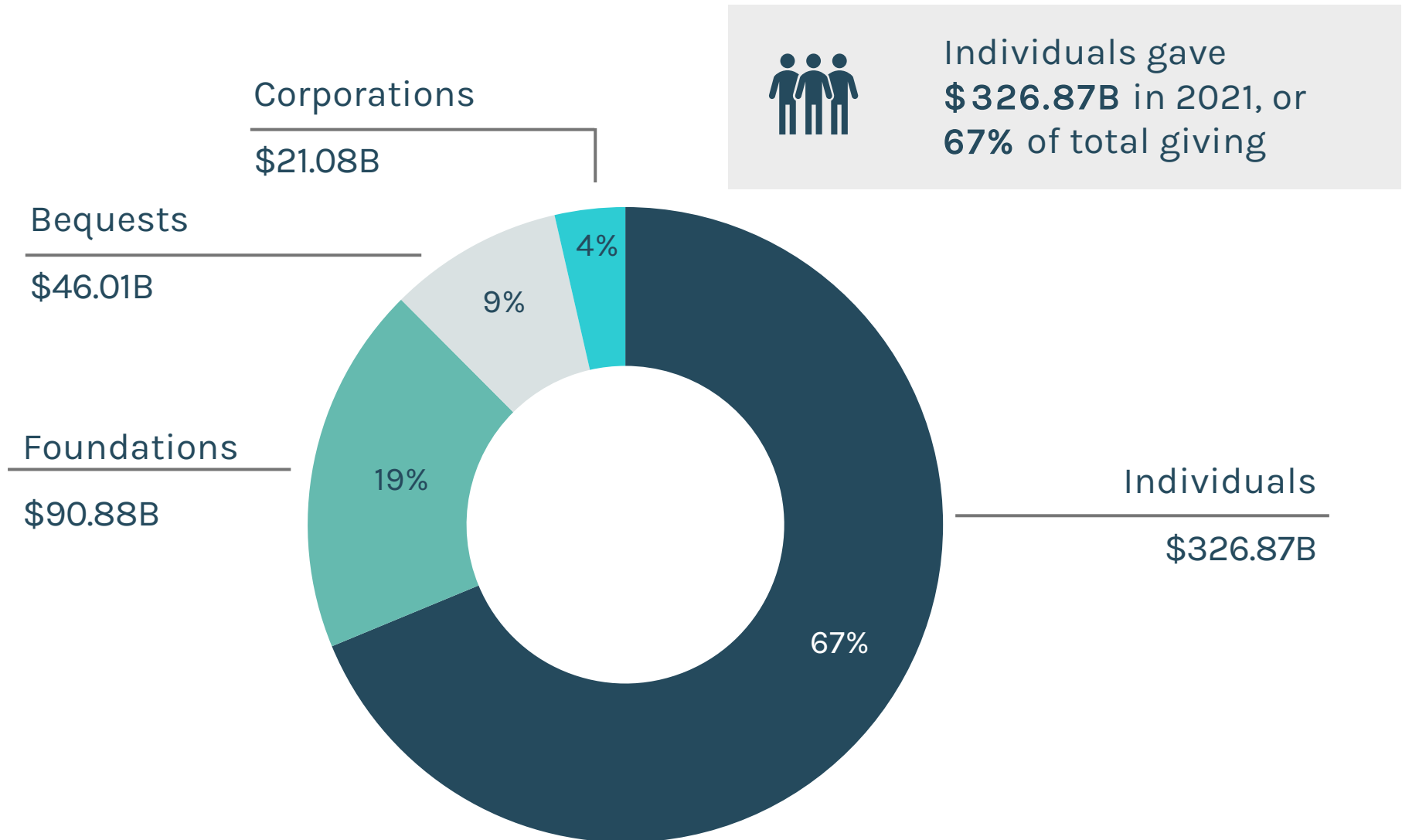
EDUCATION REMAINS SECOND-LARGEST SECTOR RECIPIENT OF CHARITABLE GIVING

The largest share of charitable dollars went to religion, which included congregations, missions, religious media, and other related organizations.

GIVING BY RECIPIENT TYPE



INDIVIDUALS CONTINUE TO DRIVE GIVING



ANNUAL FUND TRENDS

14%

Of total charitable
giving went to
education

\$1.3K

Median annual
gift by parents

\$1.7K

Median annual
giving per
student

\$562

Median annual
gift by
alumni/ae

DOLLARS UP, DONORS DOWN

Change in participation and gift amount in annual giving to Independent Schools

SOURCE	PARTICIPATION	GIFT AMOUNT
Alumni/ae	-2%	13%
Current Parents	-6%	4%
Grandparents	-1%	13%
Parents of Alumni/ae	-1%	8%
Trustees	0%	-12%
Faculty/Staff	-7%	7%



SETTING THE STAGE

1

What is one word to describe how you are feeling at the beginning of this session?

2

What area of your fundraising practice would you like to enhance this year?

3

What is the size of your development team?

DRIVING THE MISSION

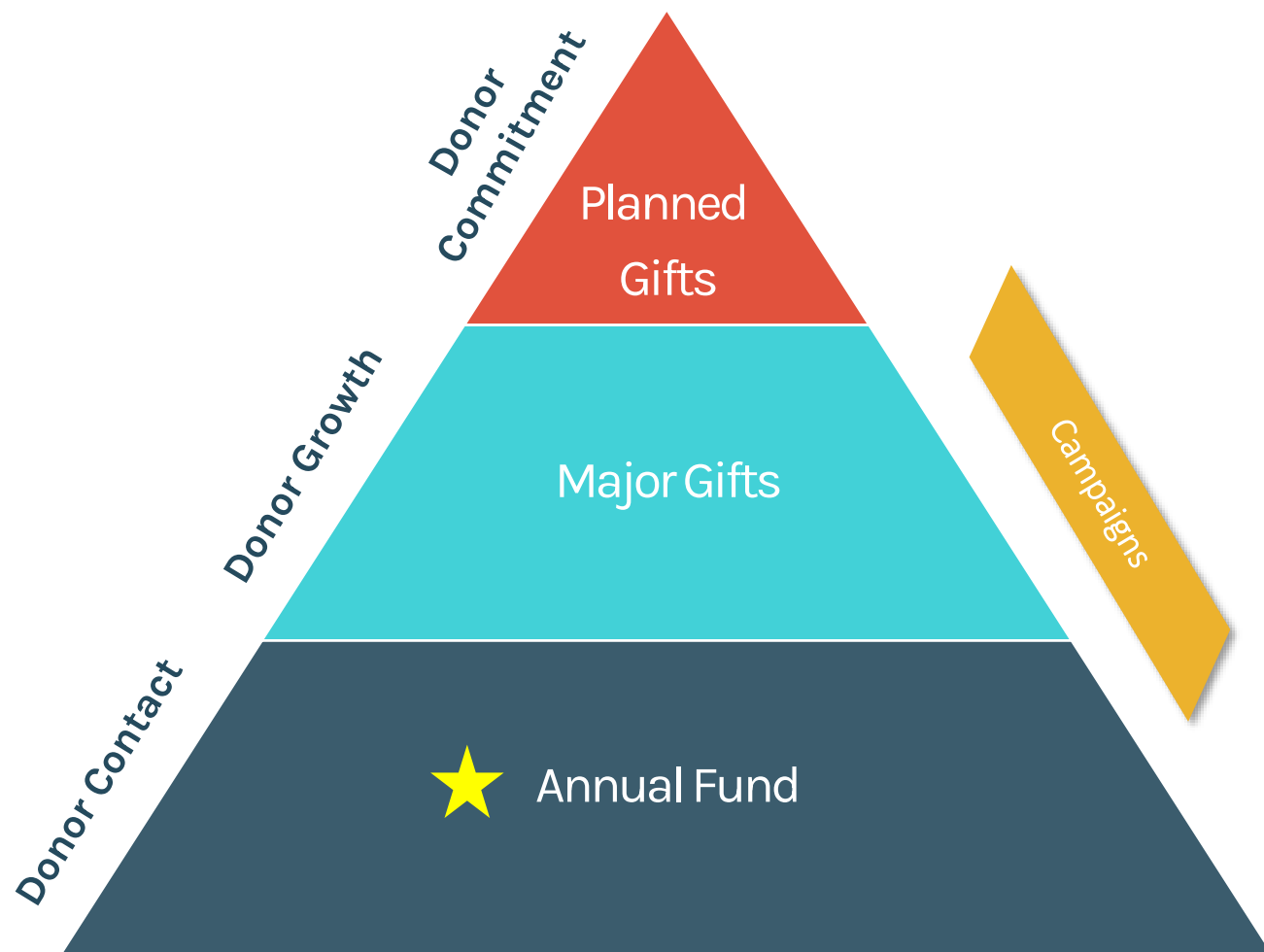


A photograph of a classroom scene. In the foreground, the back of a teacher's head and shoulders are visible on the left. The teacher is facing a group of young children sitting on a patterned rug. The children are looking towards the teacher, and some are clapping their hands. The background is filled with colorful children's artwork hanging on the wall. The overall atmosphere is bright and positive.

LEVERAGING THE ANNUAL FUND

BUILDING A STRONG ANNUAL FUND

Thoughtful annual fund stewardship creates a healthy development program



ANNUAL FUND: TABLE OF GIFTS

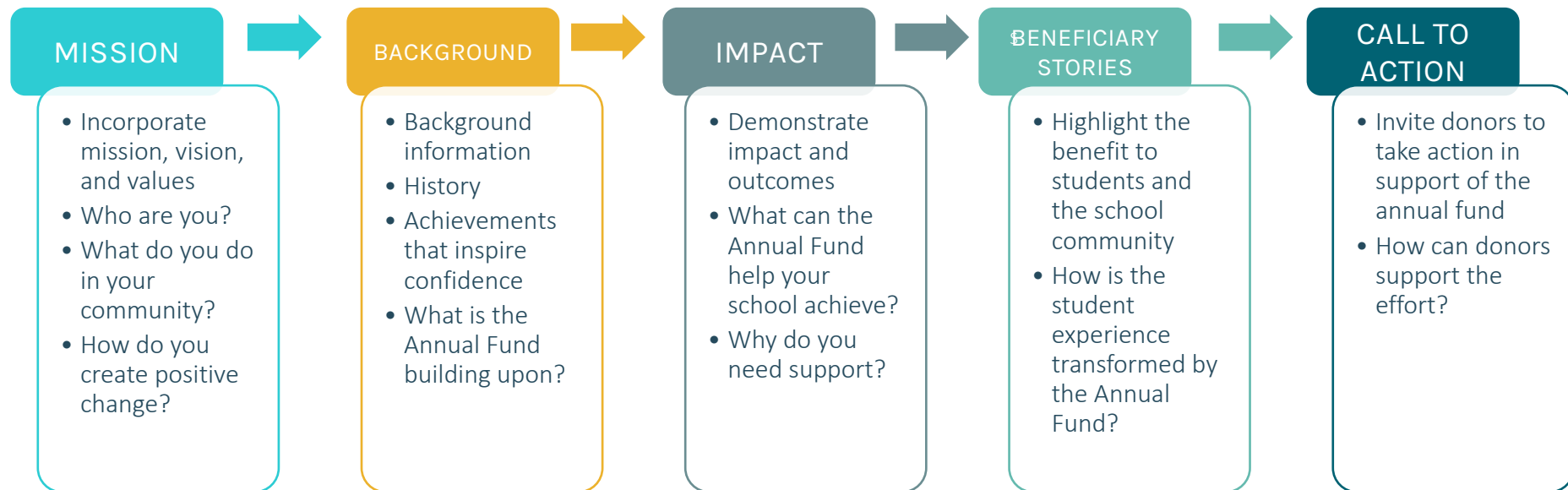
SAMPLE FUNDRAISING GOAL: \$ 210,000

Request Level	Gifts	Amount	Cumulative	Prospects
\$50,000	1	\$50,000	\$50,000	3
\$25,000	2	\$50,000	\$100,000	6
\$10,000	4	\$40,000	\$140,000	12
\$5,000	6	\$30,000	\$170,000	18
\$2,500	8	\$20,000	\$190,000	24
\$1,000	10	\$10,000	\$200,000	30
\$500	20	\$10,000	\$210,000	60
Under \$250	100	\$25	\$210,025	Many
Grand Total	151		\$210,025	453

Annotate your table: Who are the best prospects at each level?

DEVELOP A COMPELLING APPEAL

- 1 Align approach with vision, strategic plan, and operating budget
- 2 Develop a cohesive theme that aligns your messaging throughout the year
- 3 Create opportunities to further personalize your message based on constituent affiliation and donor behaviors
- 4 Use multiple marketing channels to learn about your respective donors giving preferences and consider A/B testing to further fine-tune your messaging based on their affinity.



SEGMENTATION CONSIDERATIONS

Giving
History

- LYBUNTS
- SYBUNTS
- Lapsed
- Nondonors

Affinity

- Donor Societies
- Constituencies
- Employees
- Friends

Other
Options

- Wealth Screening Results
- Modeling Scores
- Generation/Age

MARKETING CHANNELS



DIRECT MAIL



EMAIL



TEXTING



SOCIAL
MEDIA



DIGITAL
ADS



VIDEOS



EVENTS



PHONE CALLS



WEBSITE



MEETINGS

FOUR KEYS TO A SUCCESSFUL PROGRAM

Goals, Metrics, & Timeline

Goals should be set and measured based on historical giving trends as well as industry/sector benchmarks

Themes & Messaging

All communications should have consistency in the themes, messages, and personalization tactics embedded

Segmentation & Channels

Personalize requests across marketing channels to better understand your constituents and their giving preferences

Acknowledgement & Stewardship

Enhance relationships by appropriately thanking the donor and identifying annual recognition opportunities



LET'S DISCUSS

Have you rebranded your annual fund?

What key messages resonate with your annual fund supporters?

How are you demonstrating the impact of annual fund contributions to donors?



TAKEAWAY

What are one to two things
you want to bring back to
your annual fund practice?

A photograph of a classroom scene. In the foreground, the back of a teacher's head and shoulders are visible on the left. The teacher has curly hair and is wearing a light-colored top. They are facing a group of young children sitting on a patterned rug. The children are of various ethnicities and are looking towards the teacher. Some children have their hands raised, as if participating in a lesson or activity. The background is slightly blurred, showing colorful posters or artwork on the wall. The overall atmosphere is bright and educational.

MAJOR GIFTS STRATEGY

DEFINING MAJOR GIFTS

By Dollar Amount

Varies widely by organization,
ranging from
\$5,000 to \$1 million+

By Method

A strategically cultivated and
personally solicited gift, often
paid over several years, not
timed to the calendar

By Donor

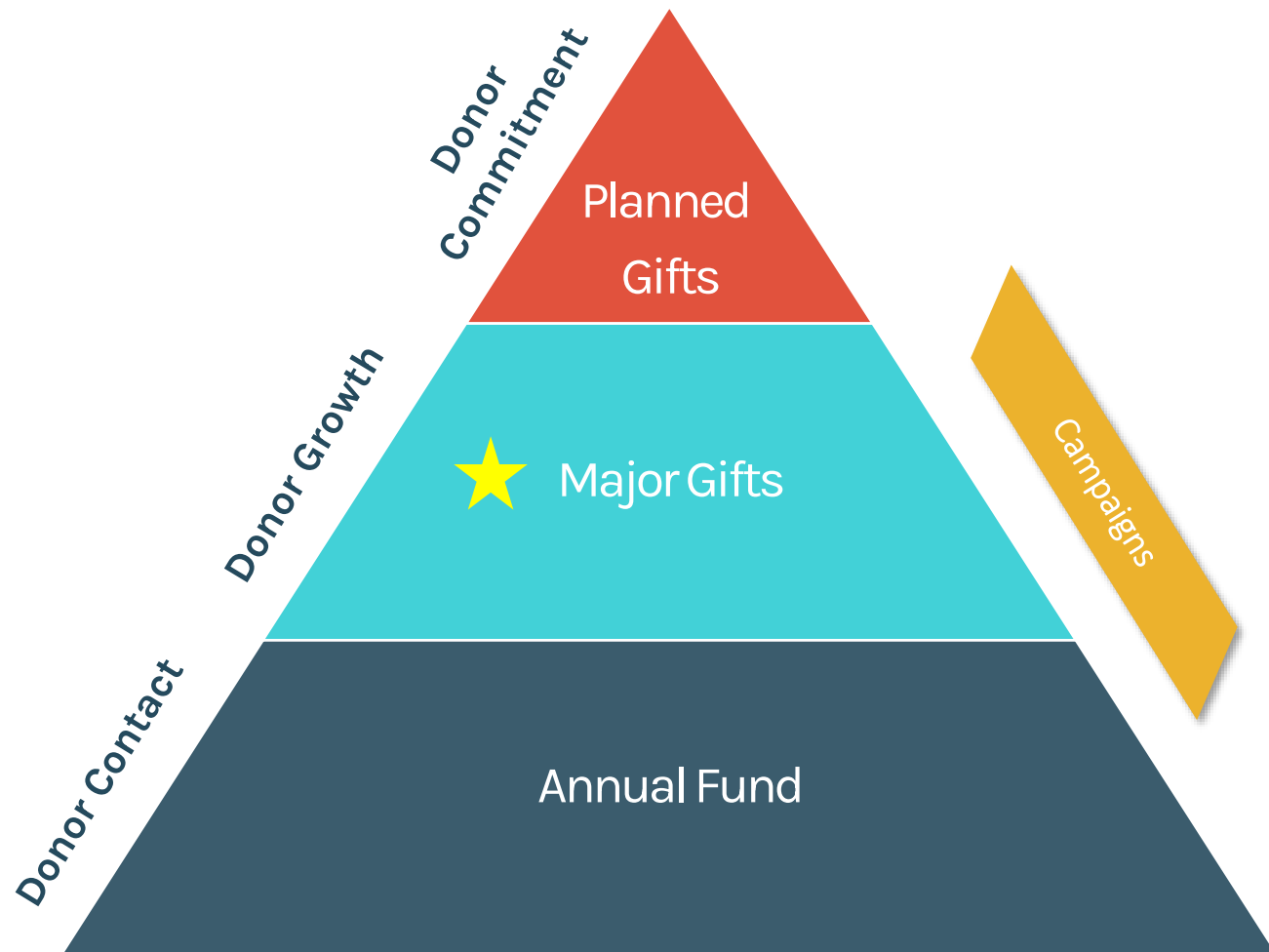
From one of the
organization's top prospects

By Impact

A gift that makes a difference
to the organization, which
may be restricted to a special
area or project

BUILDING A MAJOR GIFTS PIPELINE

Thoughtful annual fund stewardship creates a healthy major gift pipeline



QUALIFYING MAJOR GIFTS PROSPECTS

- As you are building the culture of philanthropy at your school, think about the school's Annual Fund as the school's **major gifts program**.
- Focus early activity on qualifying a portfolio of major gifts prospects (top Annual Fund donors that affirm a desire to be more involved with the school).
- Major gift prospects are qualified when they are identified as having the capacity to give a major gift (as demonstrated by Annual Fund gifts) and have an affinity for the school.

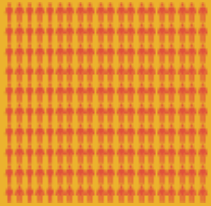


TOOLS FOR IDENTIFYING MG PROSPECTS

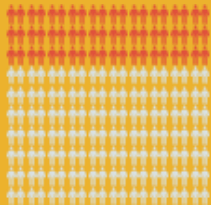
Wealth screening, predictive modeling and RFM analysis can help identify your best prospects

PREDICTIVE MODELING

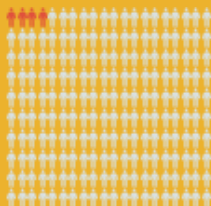
Forecasts future giving behavior



Full donor database:
10,000 constituents



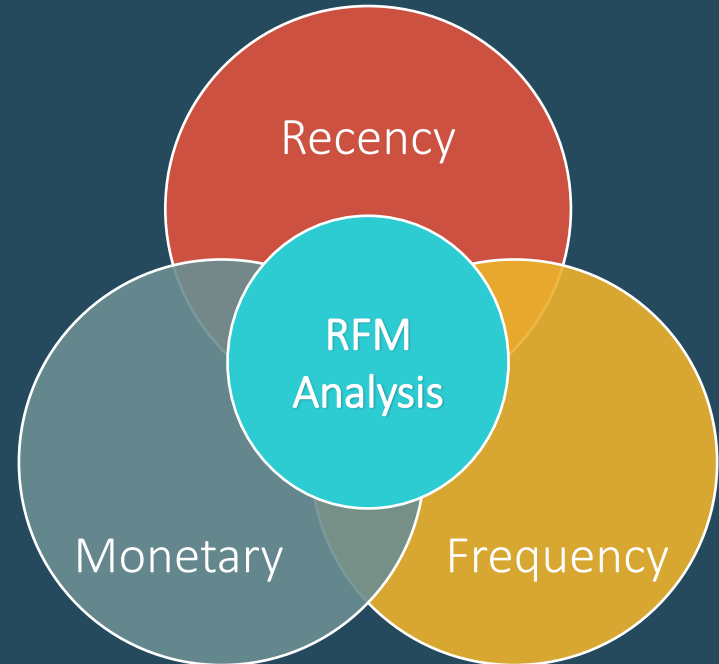
Apply multiple filters:
4,000 constituents



Add additional criteria:
250 constituents

RFM ANALYSIS

Segment donors based on giving



MAXIMIZING GIVING POTENTIAL



1. **Data:** Using your data, identify your top prospects.
2. **Wealth Screen:** Understand the total philanthropic capacity within your top prospects.
3. **Raised:** Pull your total amount raised from those prospects in a year or five-year period.
4. **Compare** the total raised in comparison to the available capacity – what is your % captured?

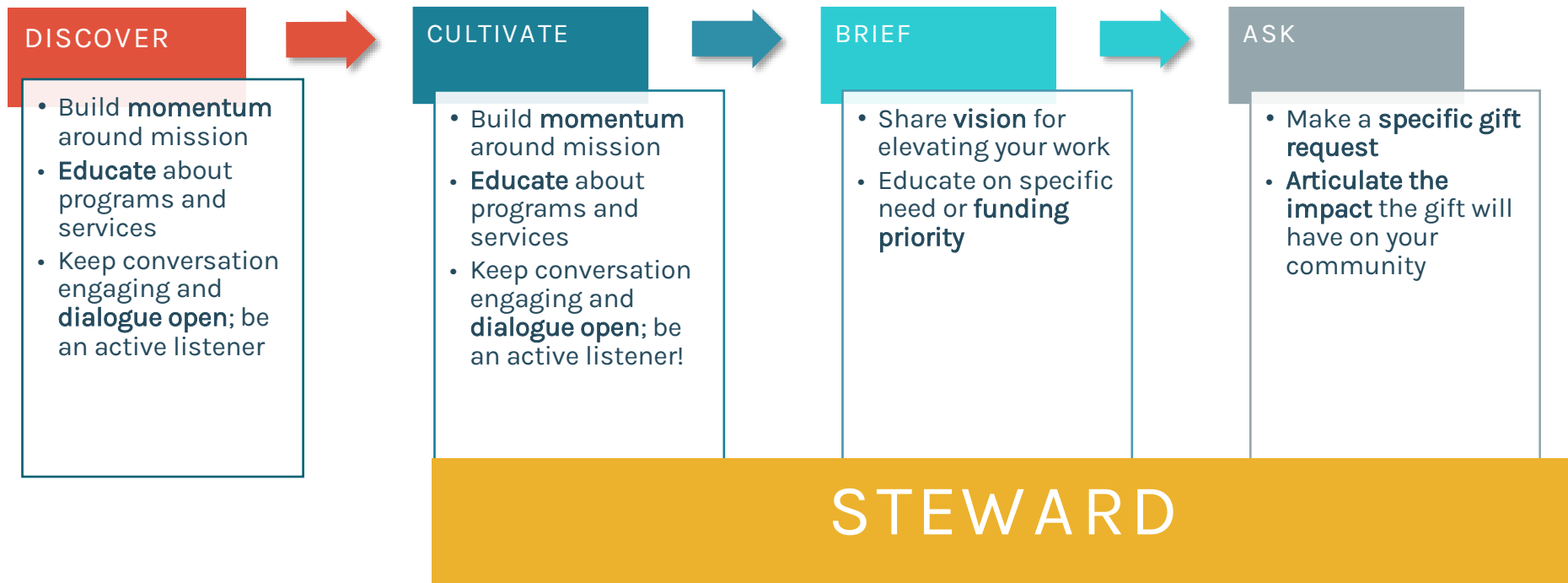
- What would it mean for your bottom line if you increased your capture rate by 2% or 5%?
- What would it take to increase your capture rate by 2% or 5%?

DONOR ENGAGEMENT STRATEGY

Identify key data points to build an individual engagement strategy over a set timeframe.

- 1 **Gift Target:** *what gift amount are we asking for?
For what area/program?*
- 2 **Solicitor(s):** *who is making the ask?*
- 3 **Timing:** *when will the ask take place?*
- 4 **Materials:** *what materials are needed to be successful?*
- 5 **What's Next:** *What is the stewardship and recognition plan?*

DRIVE PROSPECT ACTIVITY TO SECURE MAJOR GIFTS



REMINDER
Work Backwards!

SETTING ACHIEVABLE ASK AMOUNTS

Analyze available donor data to determine achievable ask amounts and set realistic goals.

MORE OBVIOUS

Gift indications

Giving history/other giving

Major Gift mentions

LESS OBVIOUS

Modeling results (if available)

Wealth screening

Previous campaigns

BROADER CONSIDERATIONS

Expect to make
2-3x the amount of
asks than will be
raised

Consider likelihood
and potential of
largest gifts
(20%+ of overall
goal)

Using prospect list,
prioritize into
phases, focus on
largest/lead gifts

Number of prospects
x required average
gift = viable?

ESTABLISH VALUES-ALIGNED RECOGNITION

Thank and Acknowledge Top Annual Fund Gifts



Consider Recognition Opportunities to Honor Top Donors



Make Visits or Calls to Thank Top Donors



Organize Events to Thank Donors and Deepen Relationships



FIVE KEYS TO SUCCESSFUL MAJOR GIFTS STRATEGY

1

Use your data. Know who your top 20 major gift prospects are each year

2

Understand all you can about the donor

3

Leverage the calendar – work backwards & be patient yet persistent

4

Focus on what you can control and move forward

4

Maintain positivity – you set the tone for your major gift program



LET'S DISCUSS

What strategies have been effective for converting annual fund donors into major gift donors at your school?



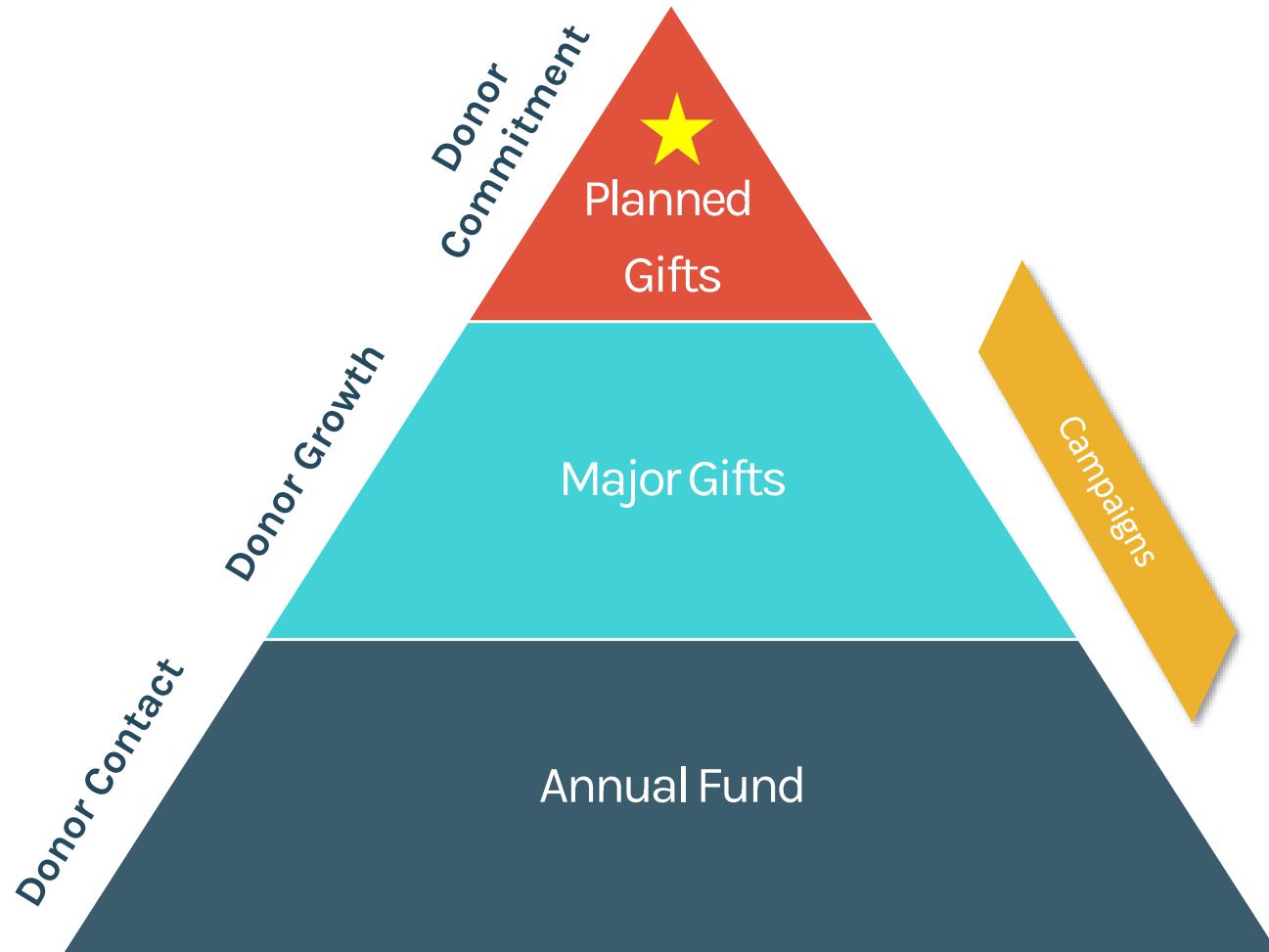
TAKEAWAY

What are one to two things
you want to bring back to
your major gift practice?

A photograph of a classroom scene. In the foreground, the back of a teacher's head and shoulders are visible on the left, wearing a white long-sleeved shirt. They are facing a group of young children sitting on a patterned rug. The children, mostly of Asian descent, are looking towards the teacher. A young boy in the center, wearing a grey and white striped hoodie and blue jeans, is clapping his hands and smiling. Other children around him are also clapping or looking attentively. The background is slightly blurred, showing colorful posters or artwork on the wall.

PLANNED GIVING STRATEGY

BUILDING A PLANNED GIVING CULTURE



A UNIQUE MOMENT FOR PHILANTHROPY

WEALTH TRANSFER



PANDEMIC + ECONOMIC
SHIFTS



DONOR SOPHISTICATION



NONPROFIT
SOPHISTICATION



ESTABLISHING A SHARED UNDERSTANDING



Gift Planning
CULTURE

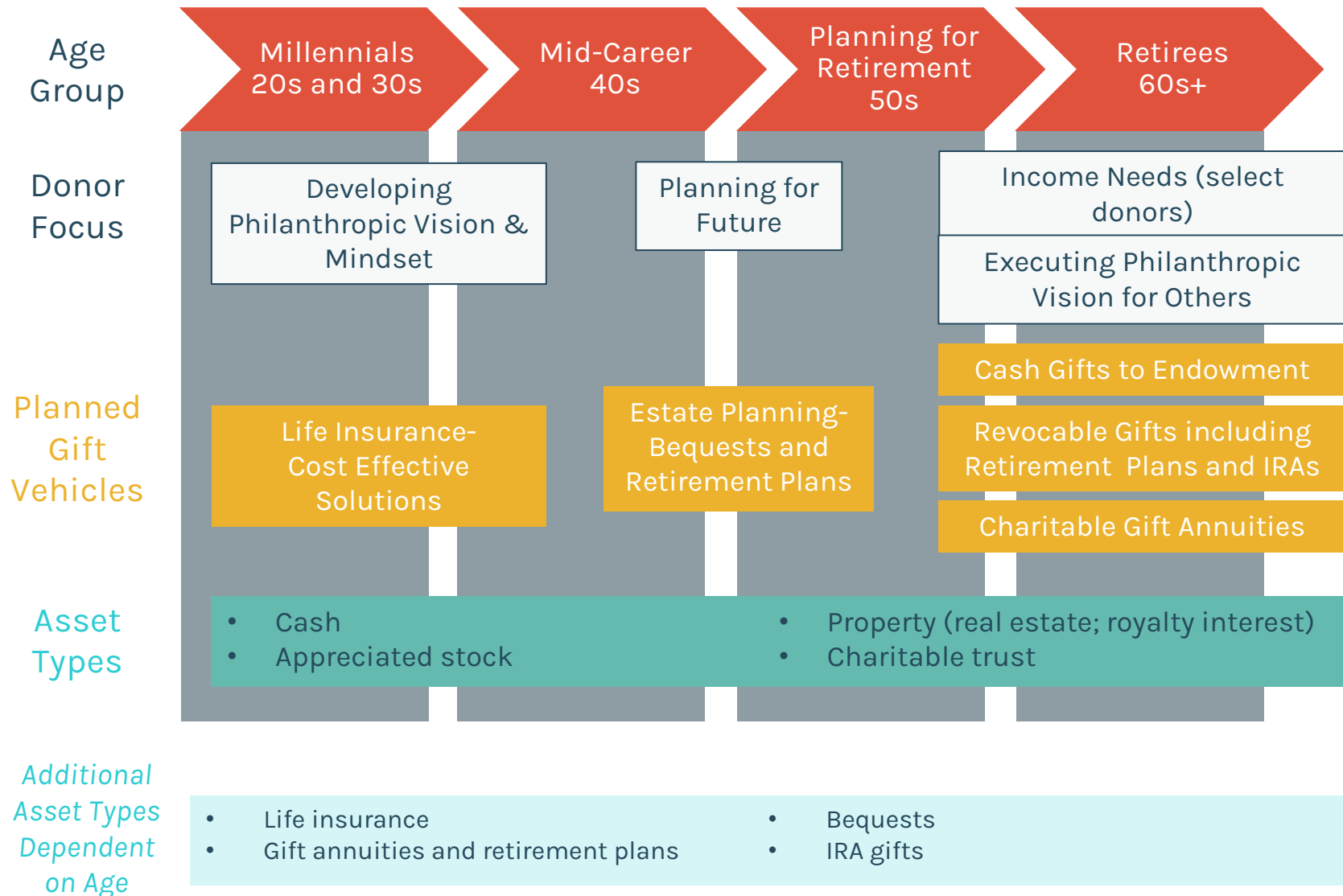


Planned Giving
PROGRAM/STRATEGY



Deferred Gift
TOOL

TIPS FOR EVERY AGE AND LIFE STAGE





LET'S DISCUSS

Who on your staff is responsible for planned giving?
Have you conducted planned giving training?



TAKEAWAY

What are one to two things
you want to bring back to
your planned giving
practice?

A photograph of a classroom scene. In the foreground, the back of a teacher's head and shoulders are visible on the left. The teacher has curly hair and is wearing a light-colored top. They are facing a group of young children sitting on a patterned rug. The children are of various ethnicities and are looking towards the teacher. Some children have their hands raised, suggesting an interactive activity. The background is filled with colorful educational posters and drawings on the wall. The overall atmosphere is bright and engaging.

THE ROLE OF CAMPAIGNS



KEY CAMPAIGN OBJECTIVES

Further the mission of the institution by achieving specific goals

Meet and exceed the minimum campaign financial objectives

Involve new and existing volunteers to meet specific campaign needs

Raise level of awareness among existing donors and volunteers, prospects, and larger community regarding specific needs for, and benefits of, the proposed project

Maintain and strengthen level of annual financial support from current donors

Enhance the philanthropic culture

Showcase the nonprofit as the pre-eminent organization of its kind in the community

BUILDING BLOCKS FOR CAMPAIGN SUCCESS

PRE-CAMPAIGN
PLANNING

SETTING A GOAL

CASE STATEMENT

PROSPECTS

CAMPAIGN PLAN

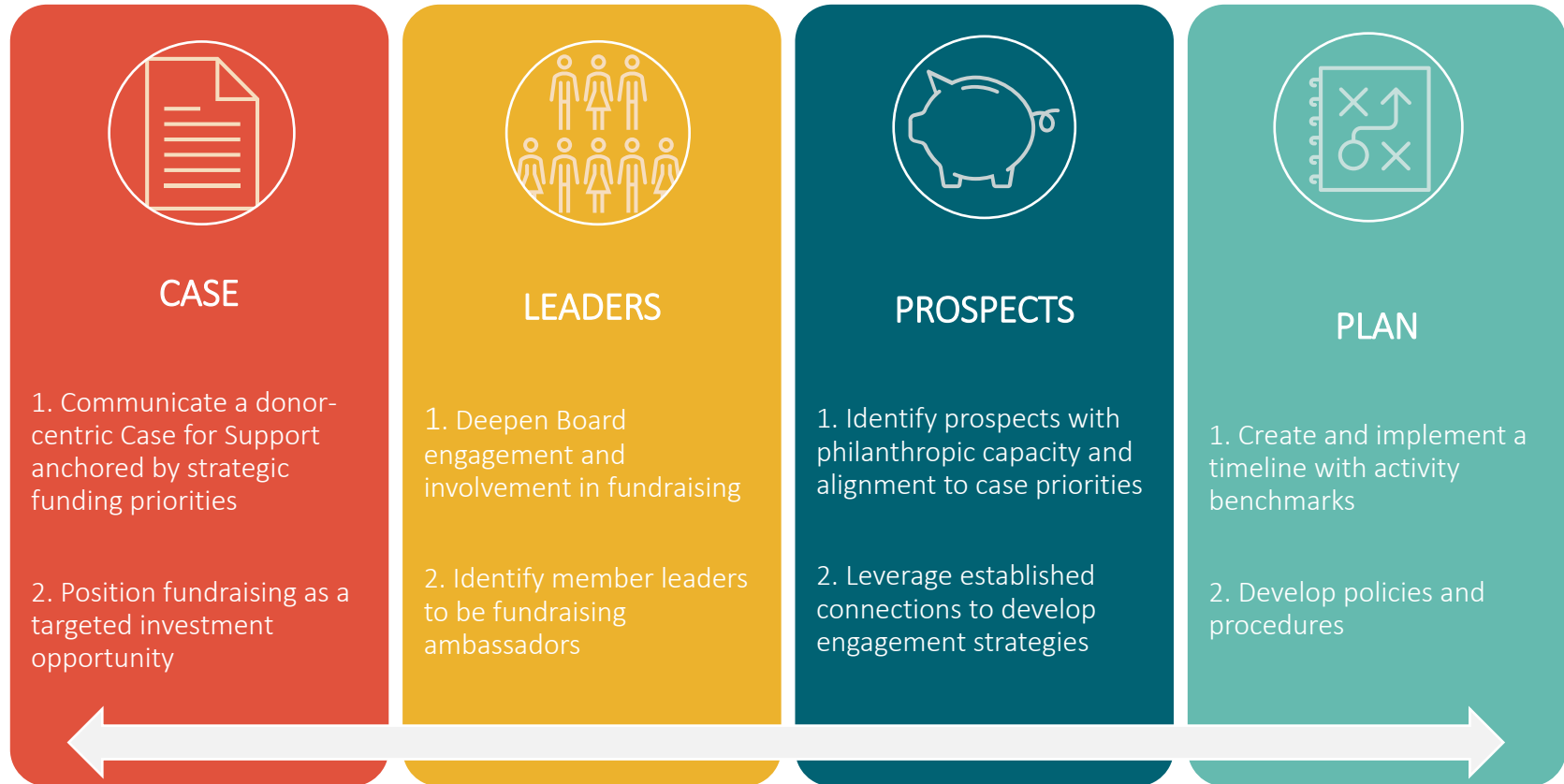
STAFF AND
LEADERSHIP ROLES

VOLUNTEER
ORGANIZATION AND
BOARD MEMBER
ENGAGEMENT

CAMPAIGN
PHASES/TIMELINE

CAMPAIGN BUDGET

ESSENTIAL ELEMENTS



COMPREHENSIVE VS STAND-ALONE CAMPAIGNS

COMPREHENSIVE

- Counts all gifts and pledges
- Inspirational case to expand and maintain mission
- Broad
- Seek one, best, multi-year commitment from each donor that includes annual giving
- Longer (3 – 5 years or more)
- Donors typically solicited one time

STANDALONE

- Counts only capital (as an example) pledges
- Extraordinary one-time investment in a capital project or program
- Targeted
- Seeks multi-year campaign commitments above and beyond annual giving
- Faster (18 months – 2.5 years)

CASE: TELL A COMPELLING, UNIQUE STORY

A case for support has several key elements:

WHO

Are you?

WHAT

Do you do in your
community?

HOW

Do you create positive
change?

WHY

Do you need support?

HOW

Much do you need?

WHEN

do you need it?



LET'S DISCUSS

Is your school in or considering a campaign?
What are the primary objectives?

PERSPECTIVE
A CONVERSATION WITH
MARK TWAROGOWSKI OF
DENVER ACADEMY

ABOUT DENVER ACADEMY



1972
Year Founded



450
Students served



2nd – 12th
Grades Served



Campus
22 acres in
Denver



27%
Of students
receive tuition
assistance



THANK YOU

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