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37th Annual Leadership Conference**



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Beyond Fundraising: Building a Resilient Culture of Philanthropy

ACIS Annual Conference
October 10, 2025



About CCS Fundraising



>75 Years

Most recommended strategic fundraising consulting firm



18 Offices

Throughout the United States and across the globe



600+ Professional Staff

Largest and most experienced staff among leading firms

90% Repeat or Referrals

Majority of our business comes from repeat business or referrals

10x Return

Our client partners experience five to more than ten times return on their investment

\$26B Campaign Goals

CCS manages over \$26B in cumulative campaign goals each year

8 Core Services

- Planning & Feasibility Studies
- Fundraising Campaigns
- Assessments & Audits
- Data Analytics
- Systems & Change Management
- Interim Development Management
- Strategic Planning & Development Projects
- Training & Leadership Development

Select Colorado Experience



Select Independent School Experience





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Philanthropic Landscape

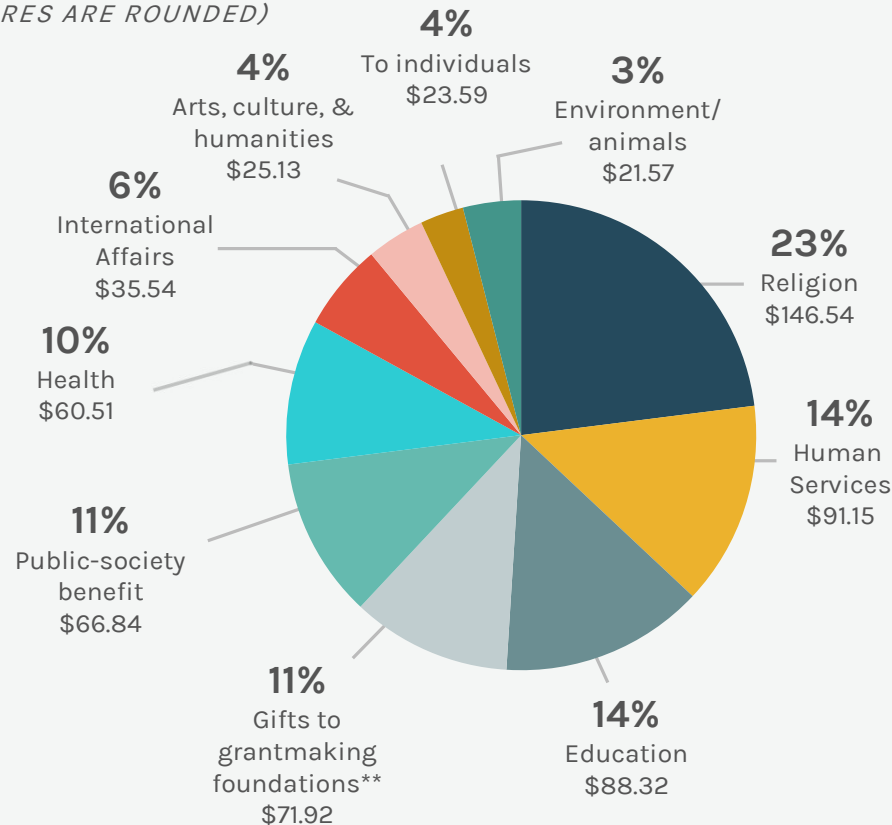
Featuring 2025 Giving USA Data

2024 Contributions: \$592.50B by Type of Recipient Organization*

(IN BILLIONS OF DOLLARS / ALL FIGURES ARE ROUNDED)

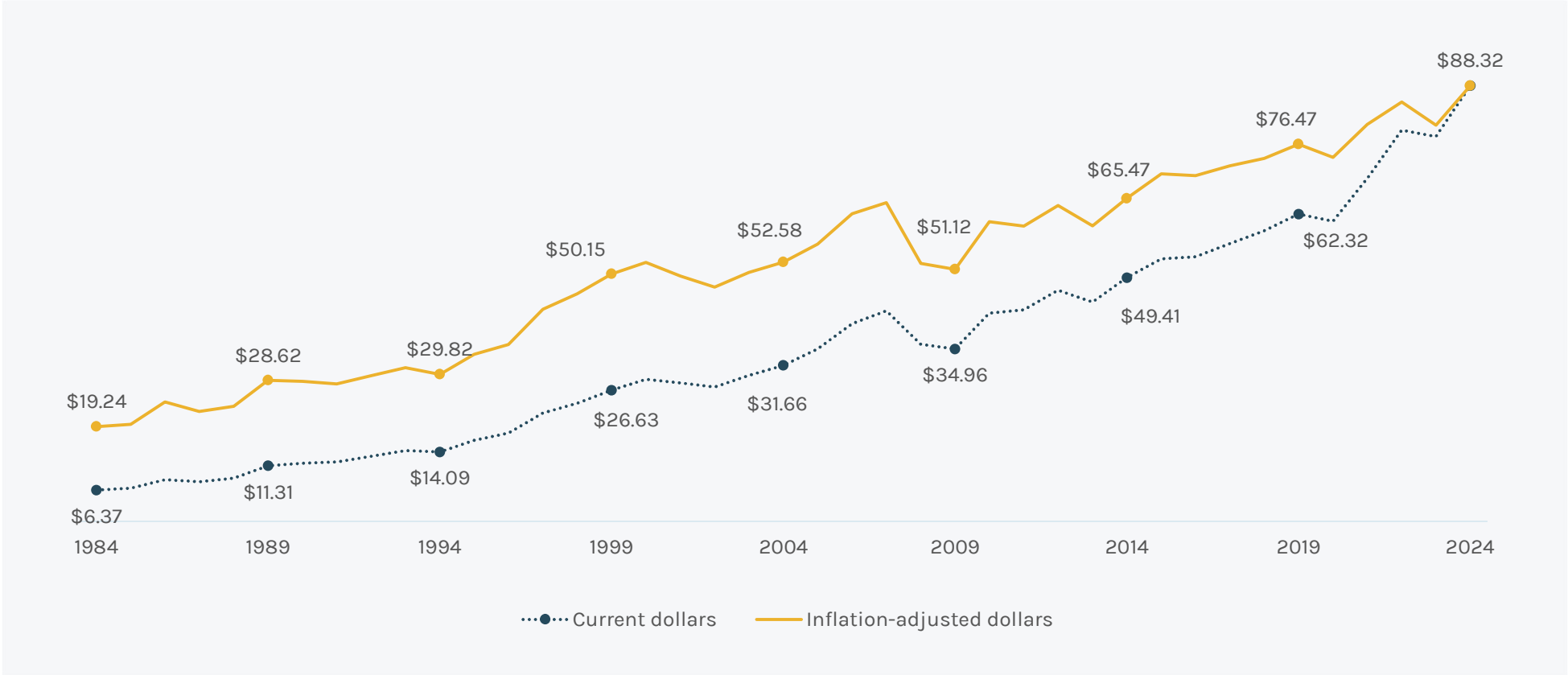
*Total includes unallocated giving, defined as the difference between giving by source and recipient categories. Unallocated giving totaled - \$38.60 billion in 2024.

**Estimates developed by the Indiana University Lilly Family School of Philanthropy using data provided by Candid.



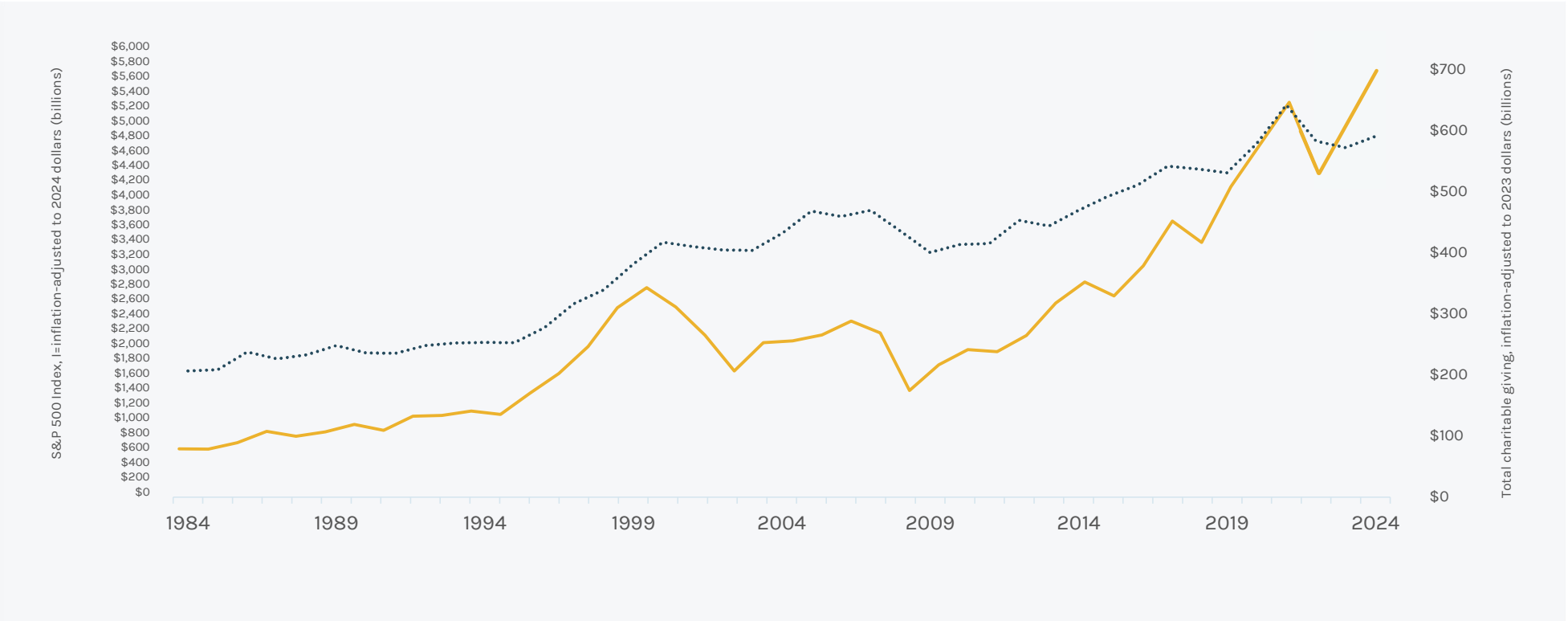
Giving to education, 1984-2024

(IN BILLIONS OF DOLLARS)



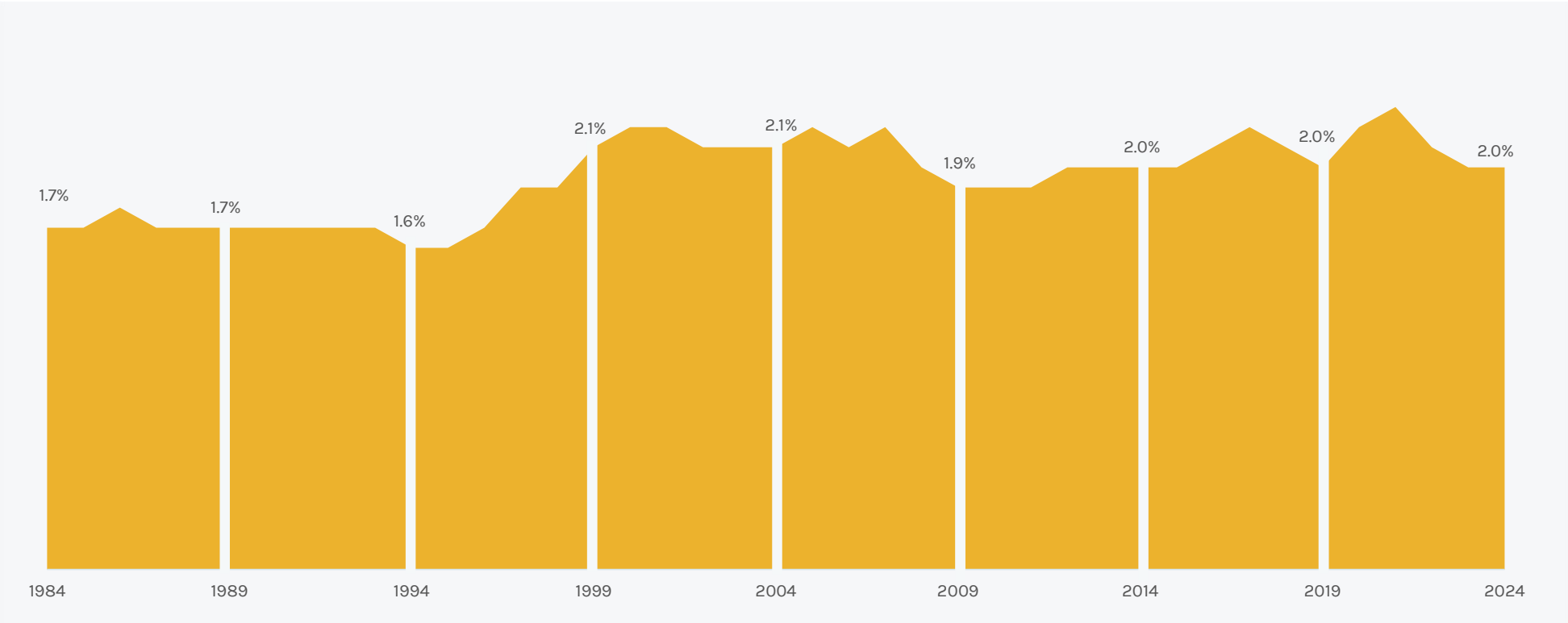
Total charitable giving graphed with the Standard & Poor's 500 Index, 1984-2024

(IN BILLIONS OF INFLATION-ADJUSTED DOLLARS, 2024=\$100)

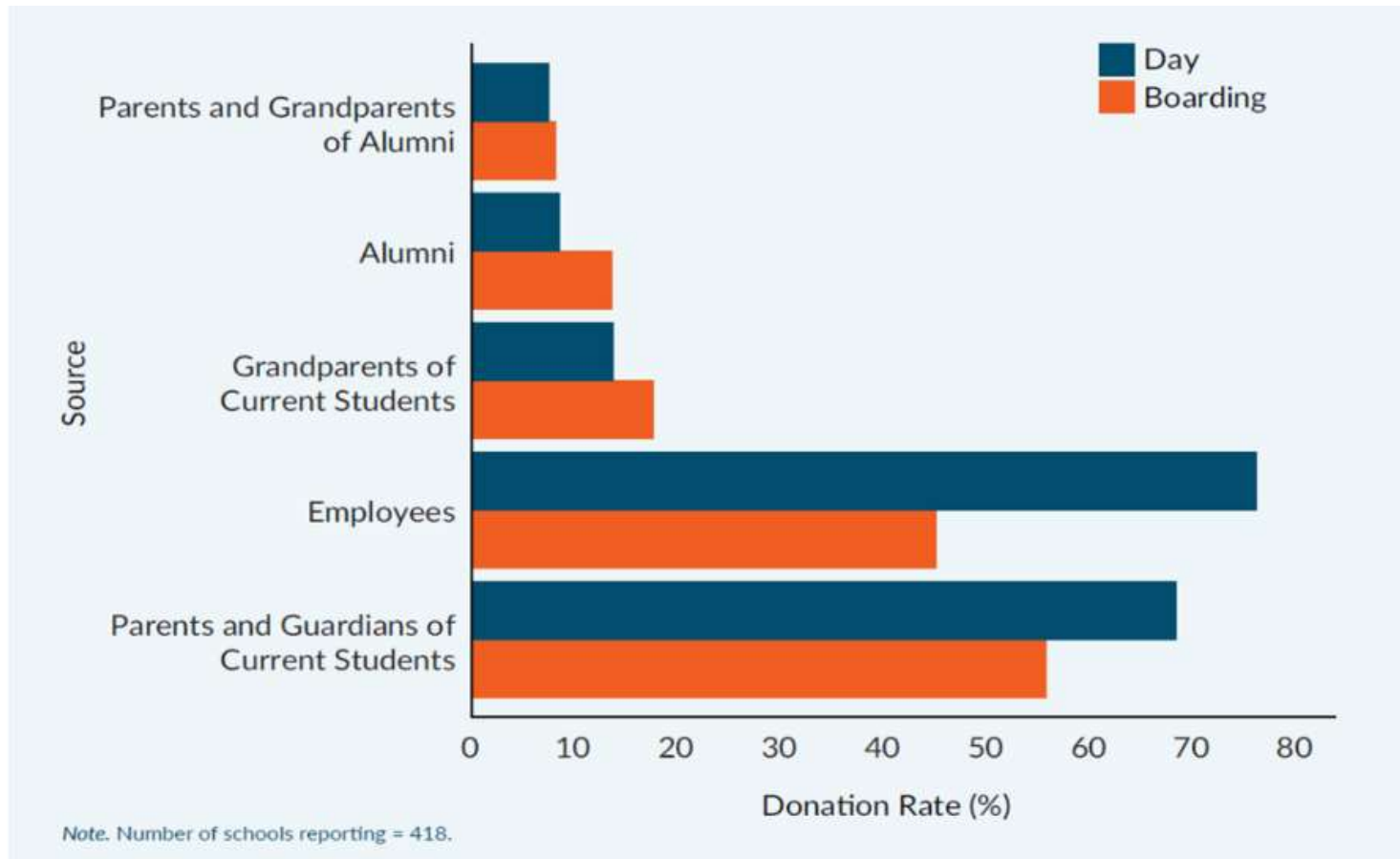


Total giving as a percentage of Gross Domestic Product, 1984-2024

(IN CURRENT DOLLARS)



Who is Giving to Schools?



Key Challenges Facing Independent Schools

Insights from the *2025 CCS Philanthropy Pulse Report*

TOP 5 INSTITUTIONAL CHALLENGES

1. Rising Costs/Tuition
2. Enrollment Pressure
3. Demand for Financial Assistance
4. Faculty/Head of School Turnover
5. Political Uncertainty

TOP 5 FUNDRAISING CONCERNS

Donor Acquisition & Retention

Meaningful, Personalized Stewardship

Donor Fatigue Among Parents

Data Hygiene & Management

Leveraging Data More Strategically



Culture of Philanthropy

Culture of Philanthropy Defined

*A thriving culture of philanthropy is a **living expression of shared purpose and collective generosity**. It is a **community-wide commitment** where every member—students, families, alumni, faculty, staff, trustees, and friends—understands that philanthropy is not just about giving but about advancing the mission and vision of the school. In this culture, **giving is joyful, inclusive, and mission-driven**. Donors feel deeply connected to the impact of their contributions, and every gift—of time, talent, or treasure—is honored as essential to the school's success. **Philanthropy is woven into the fabric of school life**, inspiring a spirit of gratitude, stewardship, and possibility that empowers the school to dream boldly and serve their community generously.*

Building a Culture of Philanthropy

Key characteristics of a strong culture of philanthropy include:

Fundraising		Philanthropy
Money	→	Relationships
Ancillary	→	Integral
Short-sighted	→	Long-term
Internally focused	→	Externally engaged
Institution-centered	→	Donor-centered
Individual	→	Teamwork
Transactional	→	Transformational
Fear driven (scarcity)	→	Vision driven (impact)

A Culture of Philanthropy



“

Board members are the primary stewards of the nonprofit organization, ultimately responsible for securing adequate resources and overseeing the disposition of those resources. For this reason, a commitment to fundraising must begin with the Board.

- James Greenfield

Author, Fundraising Responsibilities of Nonprofit Boards

The Board's Philanthropic Resolve





A Tale of Two Schools

A Case Study

A Tale of Two Schools

Mountain Academy (MA)

New Head of School (2022):	Joined after years of instability—low enrollment, morale, and fundraising.
Board Priority:	Philanthropy included as a key leadership responsibility.
Year 1 Focus:	Relationship-building and visibility—carpool greetings, event attendance, thank-you calls.
Fundraising Challenge:	\$100K short of goal; made two bold donor asks despite limited relationships.
Decision Point:	Paused internal “Philanthropy 101” to focus on understanding participation barriers.
Listening Tour:	Families revealed confusion about giving expectations and lack of transparency.

A Tale of Two Schools

Mountain Academy (MA)

New Head of School (2022): Ms. River joined after years of instability—low enrollment, morale, and fundraising.

Board Priority: Philanthropy included as a key leadership responsibility.

Year 1 Focus: Relationship-building and visibility—carpool greetings, event attendance, thank-you calls.

Fundraising Challenge: \$100K short of goal; made two bold donor asks despite limited relationships.

Decision Point: Paused internal “Philanthropy 101” to focus on understanding participation barriers.

Listening Tour: Families revealed confusion about giving expectations and lack of transparency.

Discussion Prompts

1. Where do you see evidence of a growing culture of philanthropy at MA?
2. Where does giving still feel transactional, and what are the risks?
3. How can the Board support Ms. River in building trust and transparency with families?
4. What role should faculty and staff play in the philanthropic culture—and how can they be empowered rather than burdened?
5. How can MA better communicate the purpose and impact of giving beyond tuition?

A Tale of Two Schools

Mountain Academy (MA)

In groups of 2-3, identify efforts to build a strong culture of philanthropy and evidence of a transactional culture of fundraising.

Evidence of efforts to build a strong culture of philanthropy	Evidence of a transactional culture of fundraising

A Tale of Two Schools

Oceanview School (OvS)

Legacy & Tradition:	Annual <i>Legacyview Dinner</i> honors 75 legacy families, alumni, and past school leaders to celebrate community.
Philanthropy Woven Into Admissions:	Tours highlight spaces made possible by giving. Admissions materials showcase 100% staff participation and donor stories.
Personalized Connection:	DoD greets families by name at drop-off, building authentic relationships beyond fundraising.
Leadership Engagement:	100% Board participation before annual appeal launch. Oceanfund Committee actively calls, writes, and thanks donors.
Transparent Stewardship:	Oceanpact Report shared impact stories and handwritten notes from the HoS.

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Transparent Stewardship: Oceanpact Report shared impact stories and handwritten notes from the HoS.

Discussion Prompts

1. Where do you see evidence of a strong culture of philanthropy at OvS?
2. Are there areas fundraising feels transactional?
3. What ideas do you have for OvS to continue to build their culture of philanthropy?
4. What conditions for success support their strong culture of philanthropy?

A Tale of Two Schools

Oceanview School (OvS)

In groups of 2-3, identify efforts to build a strong culture of philanthropy and evidence of a transactional culture of fundraising.

Evidence of efforts to build a strong culture of philanthropy	Evidence of a transactional culture of fundraising



What's Your School's Philanthropy GPA?

A Self Assessment

Culture of Philanthropy | School Self Assessment

Key Driver	1 - Never	2 - Seldom	3 - Sometimes	4 - Often	5 - Always
Our board prioritizes philanthropy – they are informed and lead					
Our head of school celebrates philanthropy and is equipped to spend time sharing the vision and thanking donors					
Our development team is well equipped and staffed to build relationships and to plan and manage fundraising priorities					
Families are educated on the school’s financial model and the role of philanthropy					
Volunteer leaders are appropriately staffed and are engaged in sharing why they give, inviting others to join them, and thanking donors					
There is a history of giving and donors understand the impact of philanthropy on the school’s mission, vision, and values					
Our donors are thanked and recognized appropriately					

Culture of Philanthropy | School Self Assessment

Needs Attention
Score: 1-14



Continue Building
Score: 15- 25



Actively Maintain
Score: 26-35

Next Step: Take dedicated steps and put prioritized attention to further building a culture of philanthropy. Consider a development audit to further understand and align on strengths and opportunities.

Next Step: Host a discussion at the development committee or board level to celebrate successes and commit to specific strategies to continue to enhance the culture of philanthropy.

Next Step: Celebrate the generations who came before you and helped build the foundation. Continue to find opportunities to celebrate the generosity and impact of the community.

Extra Credit (5 pts.): Does your school have a visible legacy society where everyone is informed and invited to provide a legacy gift?



Where do you see the greatest barrier at your school to establishing or maintaining a thriving culture of philanthropy?



What is one thing you, personally, can do to build a stronger culture of philanthropy at your school?



What is one thing you think your school should do to enhance its culture of philanthropy?

Tactics You Can Apply Now

Leadership (Head of School/Board)

- ☐ Make philanthropy part of every board meeting agenda - include metrics and stories
- ☐ Encourage leaders to share their personal giving stories to highlight and celebrate giving at all levels

Faculty & Staff

- ☐ Provide mission language toolkits so everyone can confidently articulate the case for support
- ☐ Celebrate small and big acts of philanthropy internally (e.g., participation in annual fund, volunteerism)

Parents, Guardians, & Families

- ☐ Include a philanthropy corner in each newsletter to celebrate why families give and stories of impact
- ☐ Have volunteers staff a philanthropy booth at back-to-school night

Alumni

- ☐ Use reunion years as natural inflection points for engagement
- ☐ Celebrate alumni stories to show the impact of the school



Discussion

Thank You!



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