

# 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



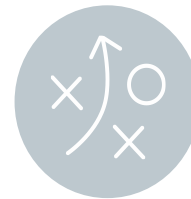
INTERIM  
DEVELOPMENT  
MANAGEMENT



DATA  
ANALYTICS,  
SYSTEMS, &  
RESEARCH



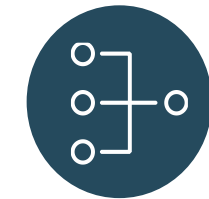
STAFF  
ASSESSMENTS &  
ORGANIZATIONAL  
AUDITS



STRATEGIC  
PLANNING



TRAINING &  
PROFESSIONAL  
DEVELOPMENT



SPECIALIZED  
DEVELOPMENT  
PROJECTS



01

OVERVIEW OF  
PHILANTHROPIC  
LANDSCAPE

02

KEYS TO  
ENHANCING  
FUNDRAISING

03

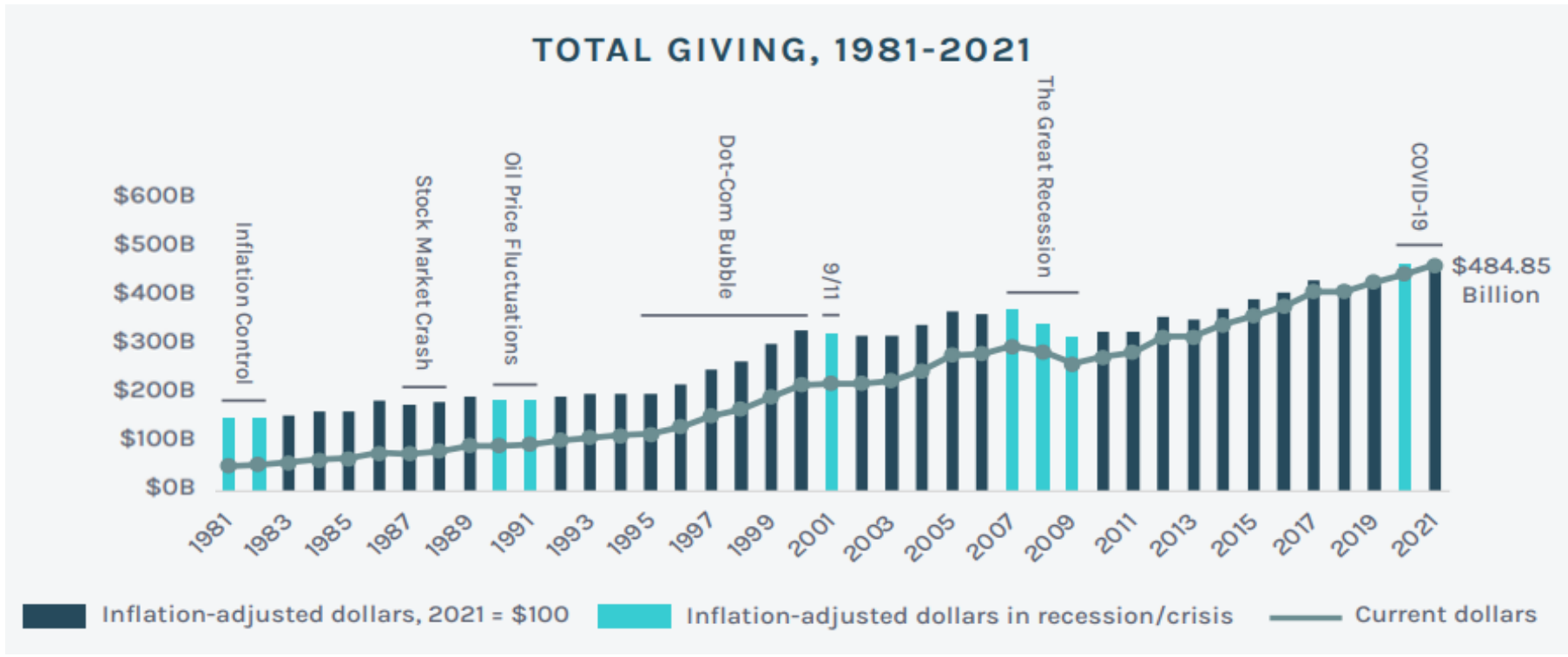
PEER PERSPECTIVE  
FEATURING  
DENVER ACADEMY

A young boy with dark hair, wearing a light-colored striped hoodie and blue jeans, is sitting on a patterned rug in a classroom. He is clapping his hands and looking towards the left. In the background, several other children are sitting on the rug, some also clapping. The classroom walls are decorated with colorful posters and drawings. The overall scene is bright and cheerful.

## THE PHILANTHROPIC LANDSCAPE

# US CHARITABLE GIVING INCREASED 7% SINCE 2019

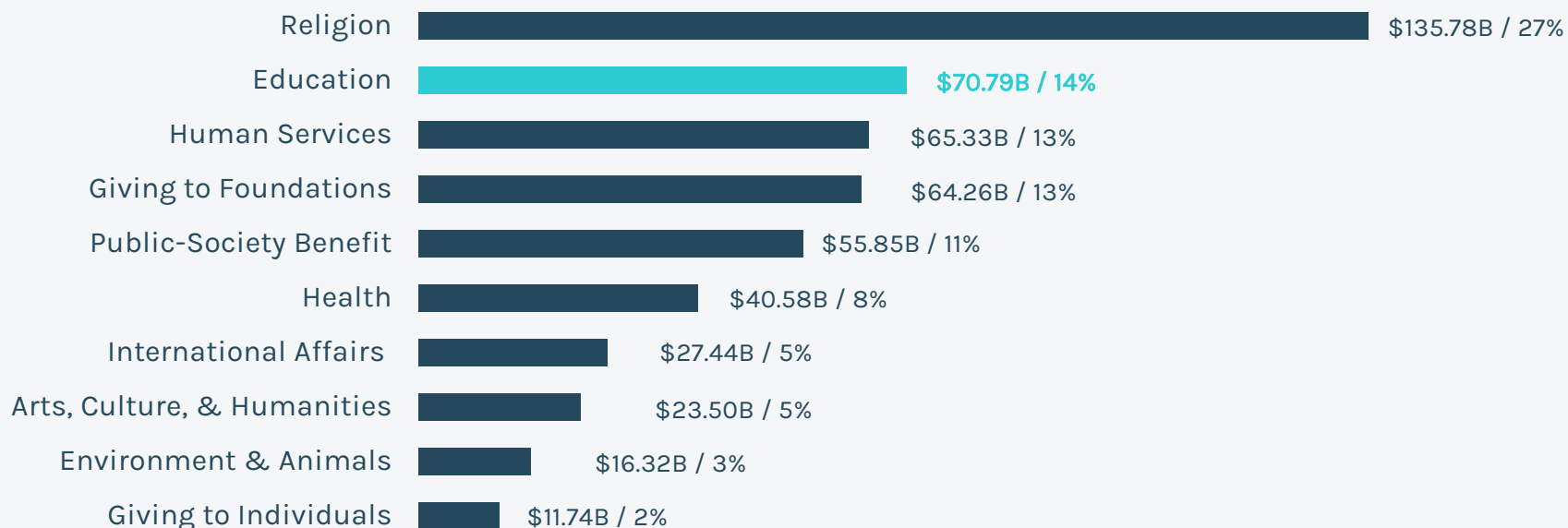
Giving USA estimates that charitable giving in the United States reached **\$484.85** billion in 2021. On average, US individuals, corporations, and foundations donated \$1.33 billion per day. Giving has increased 7% since 2019.



# EDUCATION REMAINS SECOND-LARGEST SECTOR RECIPIENT OF CHARITABLE GIVING

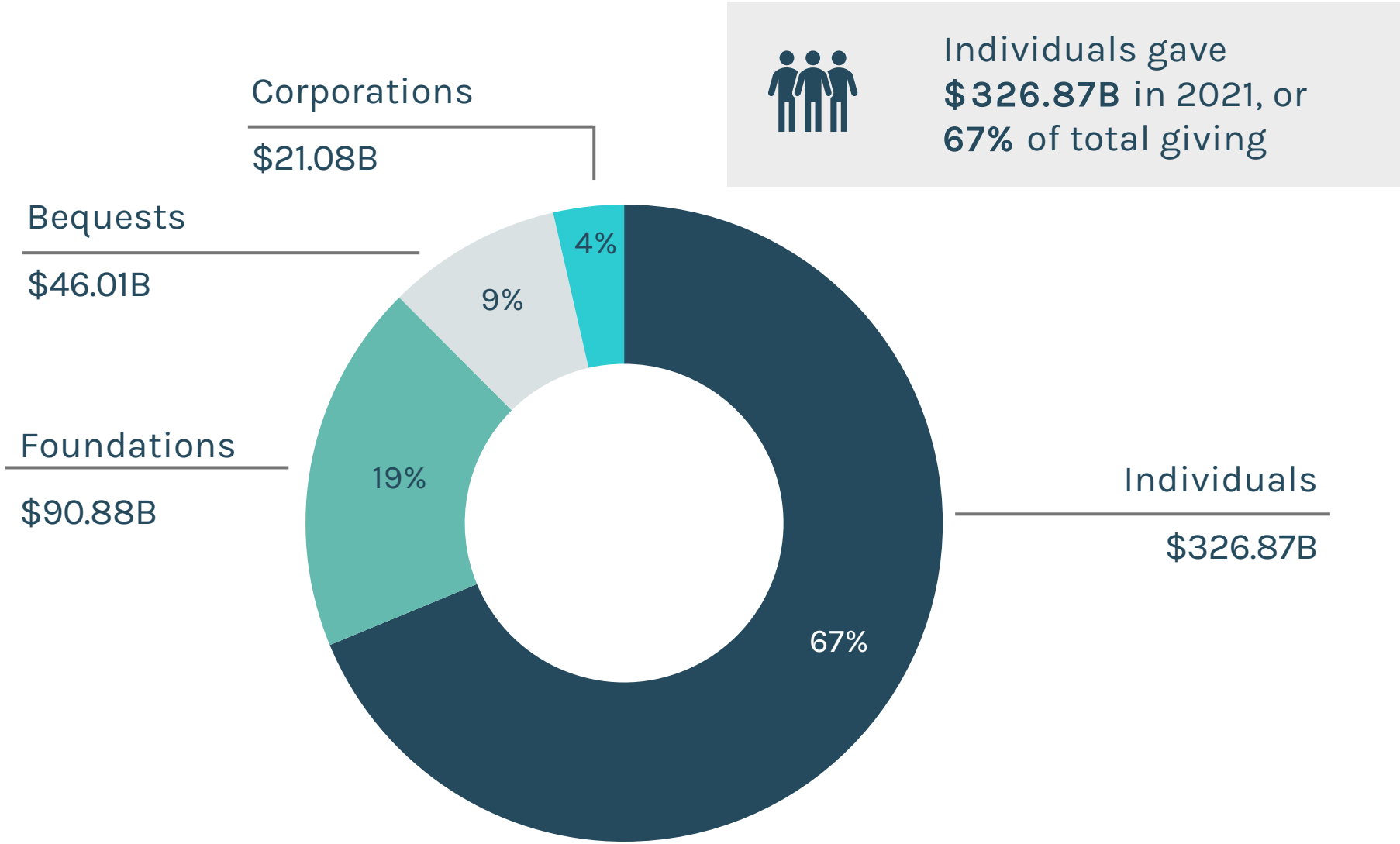
The largest share of charitable dollars went to religion, which included congregations, missions, religious media, and other related organizations.

## GIVING BY RECIPIENT TYPE

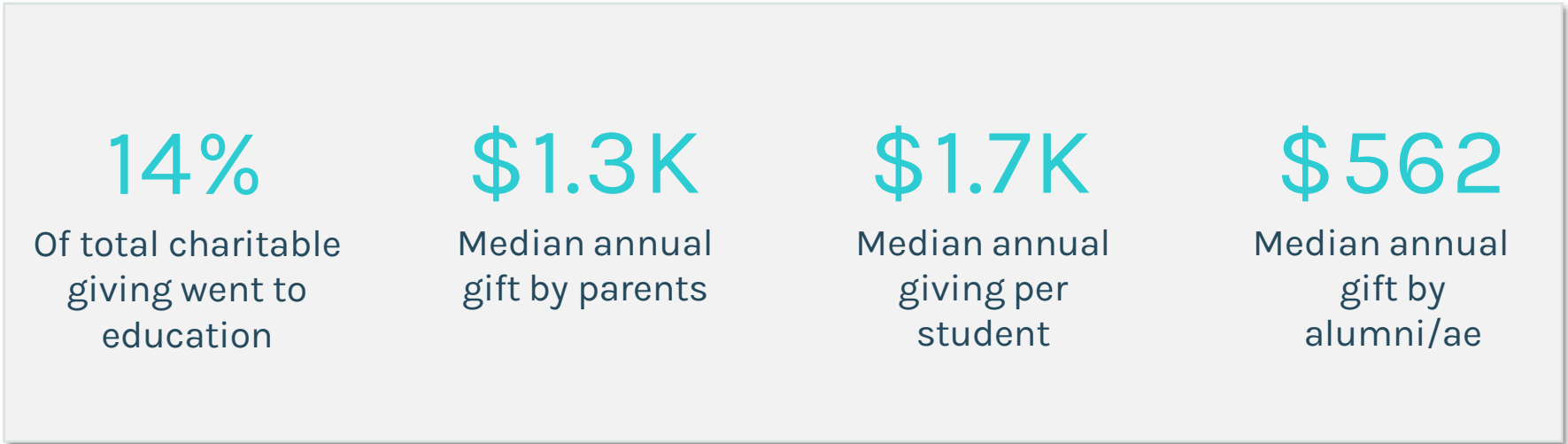




# INDIVIDUALS CONTINUE TO DRIVE GIVING



# ANNUAL FUND TRENDS



## 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

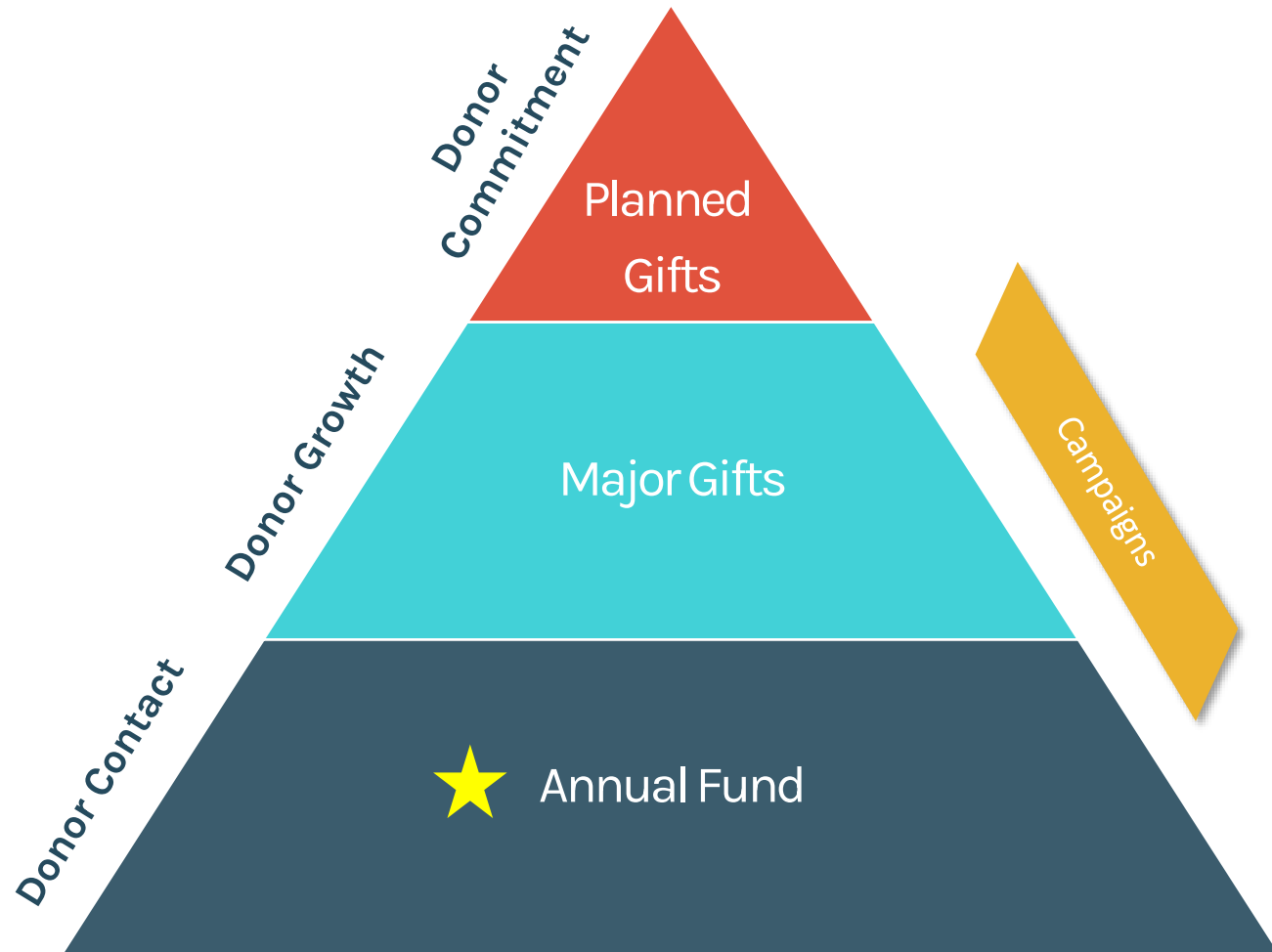


A young boy with dark hair, wearing a light-colored striped hoodie and blue jeans, is sitting on a patterned rug in a classroom. He is clapping his hands and looking towards the left. Other children are visible in the background, also clapping. The scene is brightly lit and has a warm, educational atmosphere. The text "LEVERAGING THE ANNUAL FUND" is overlaid on the left side of the image.

## LEVERAGING THE ANNUAL FUND

# BUILDING A STRONG ANNUAL FUND

Thoughtful annual fund stewardship creates a healthy development program



# ANNUAL FUND: TABLE OF GIFTS

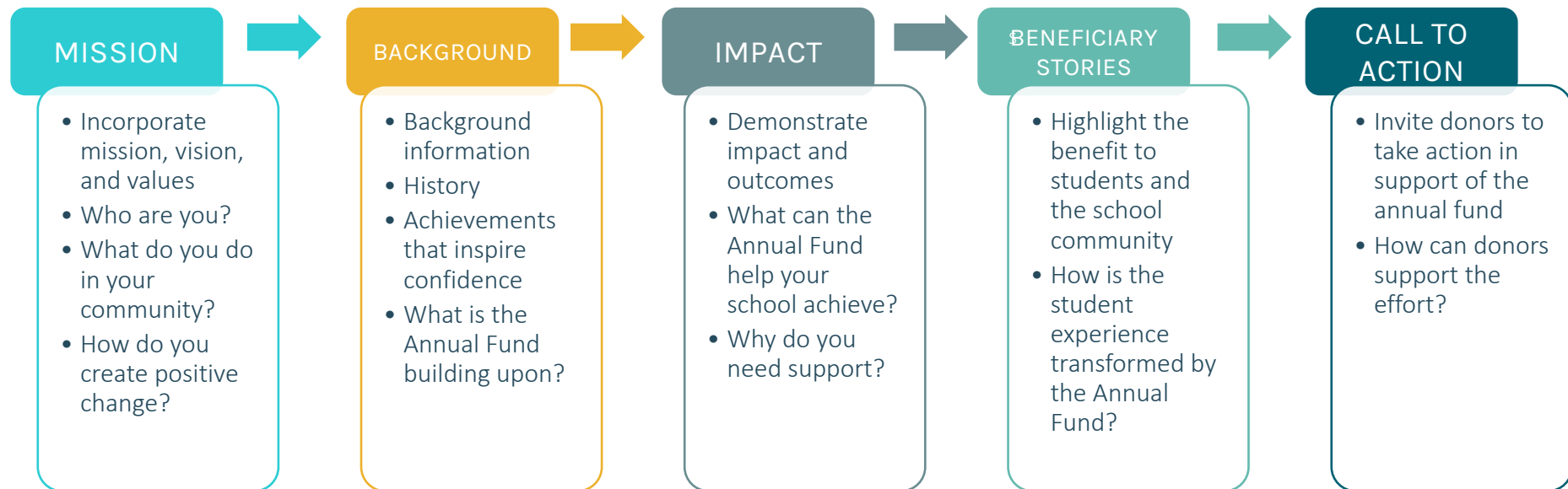
SAMPLE FUNDRAISING GOAL: \$ 210,000

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. A teacher, seen from the back and side, is sitting on the floor. She has curly hair and is wearing a white top. She is clapping her hands. In front of her, a group of young children are sitting on the floor. They are also clapping and smiling. The children are of various ethnicities. The background is a classroom with colorful posters on the wall. The overall atmosphere is bright and cheerful.

## 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

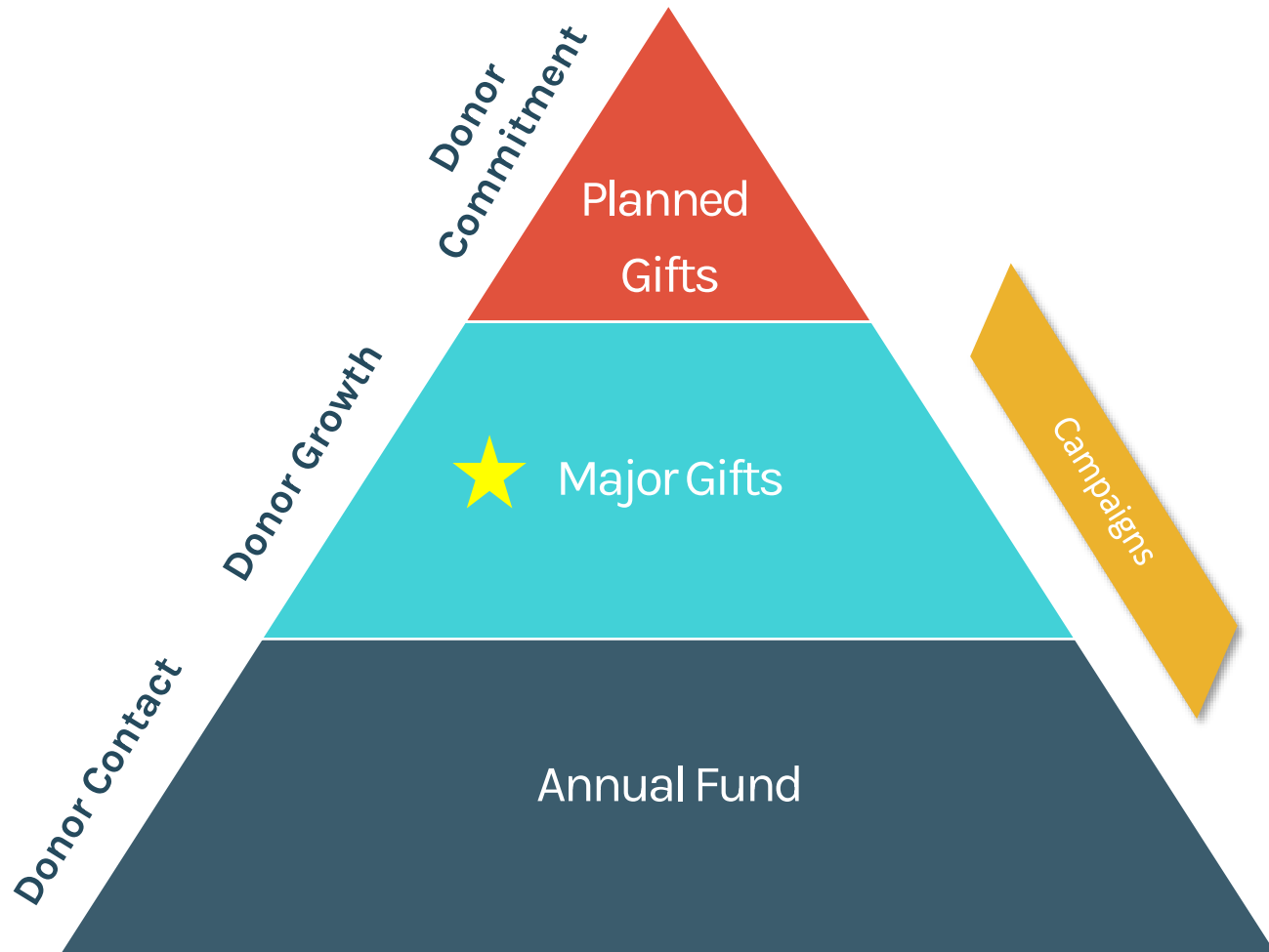
From one of the  
organization's top prospects

## 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.



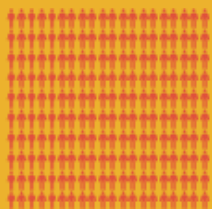


# TOOLS FOR IDENTIFYING MG PROSPECTS

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

## PREDICTIVE MODELING

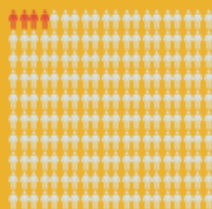
Forecasts future giving behavior



Full donor database:  
10,000 constituents



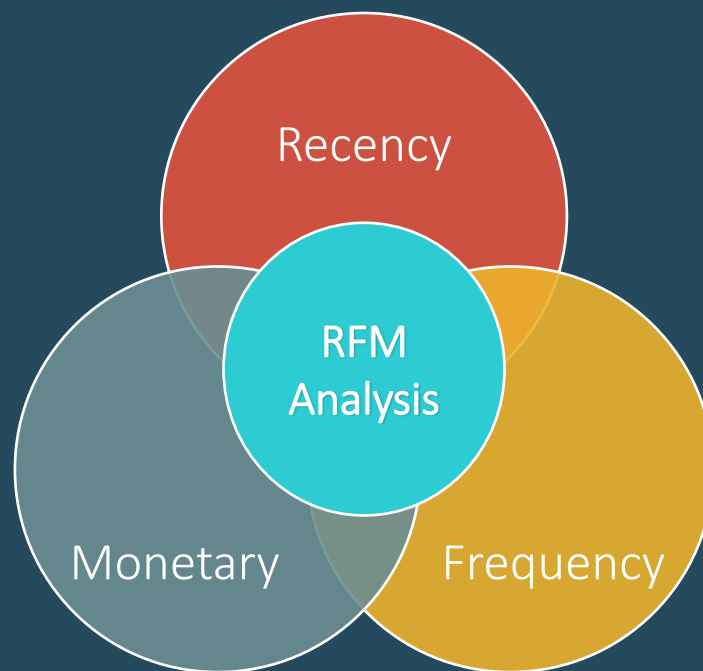
Apply multiple filters:  
4,000 constituents



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?

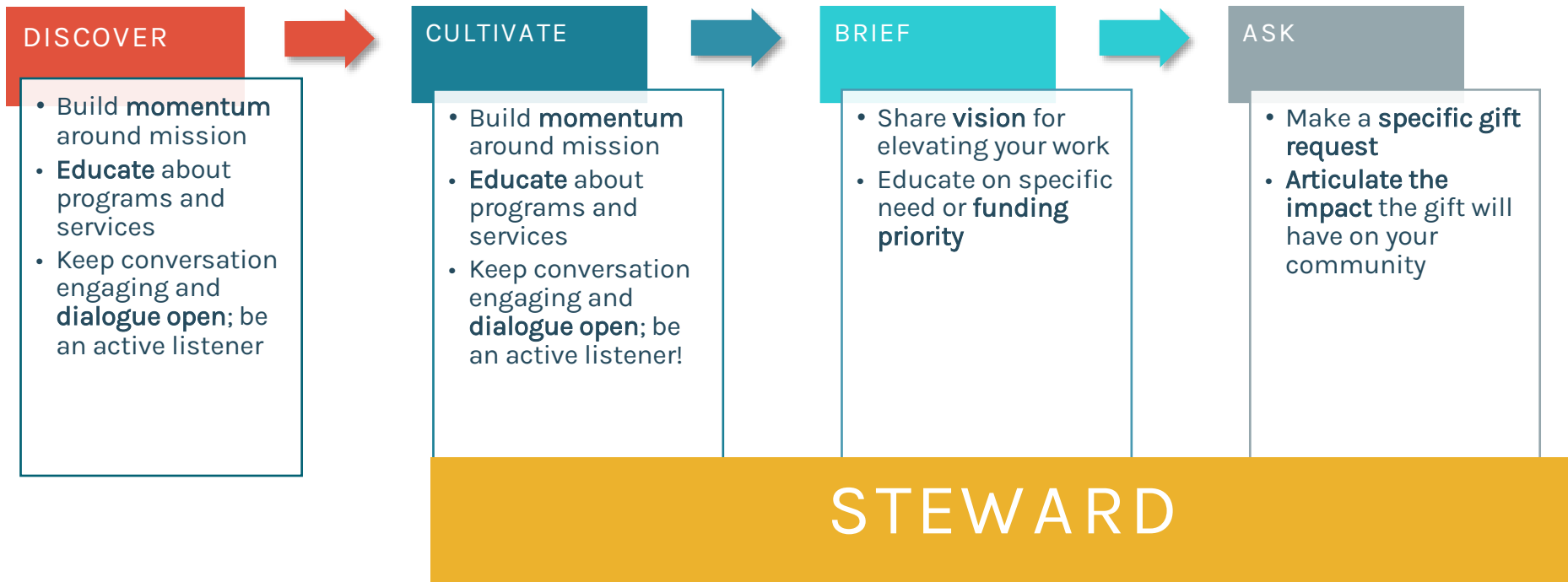
- What would it mean for your bottom line if you increased your capture rate by 2% or 5%?
- What would it take to increase your capture rate by 2% or 5%?

# 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?





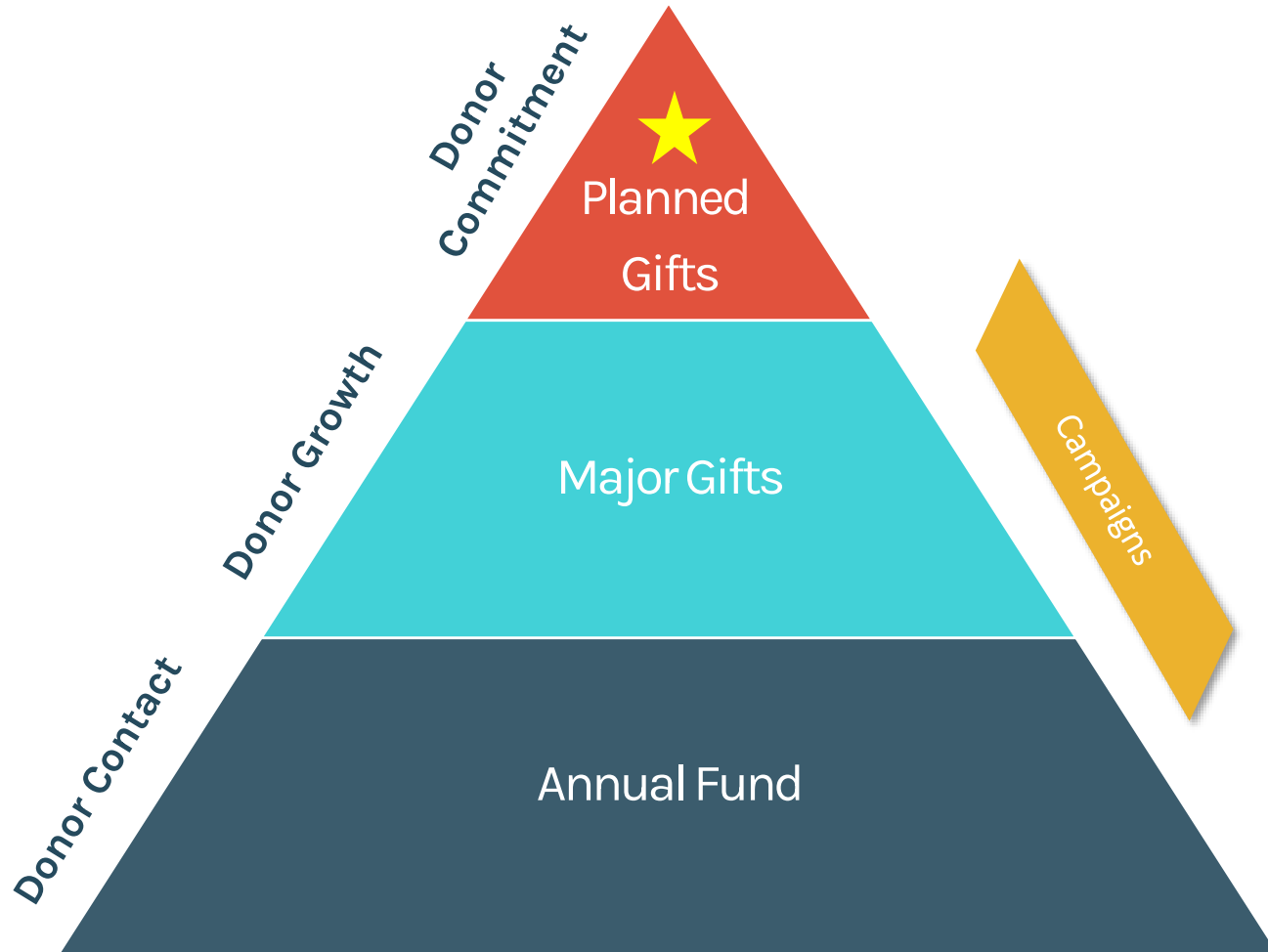
## TAKEAWAY

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

A photograph of a classroom scene. A teacher, seen from the back/side, is sitting on the floor and clapping. A group of young children, including a boy in the foreground, are also sitting on the floor and clapping. The background shows colorful posters on the wall. The text "PLANNED GIVING STRATEGY" is overlaid in the center.

# 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

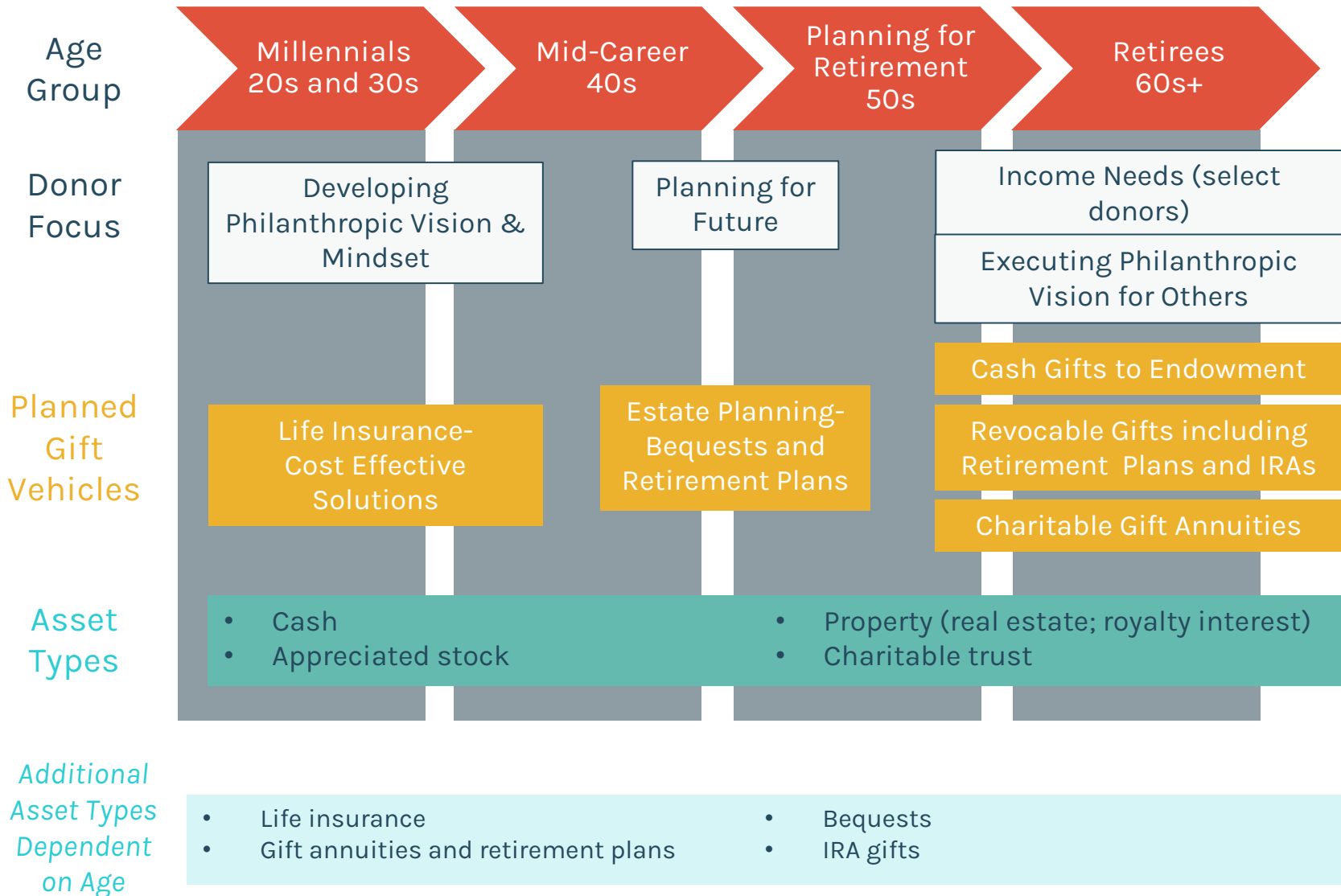


Planned Giving  
PROGRAM/STRATEGY



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. A teacher, seen from the back and side, is sitting on the floor and interacting with a group of young children. The children are also sitting on the floor, some clapping their hands. The background is filled with colorful educational posters and drawings on the wall. The overall atmosphere is bright and positive.

# 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



2<sup>nd</sup> - 12<sup>th</sup>  
Grades Served



Campus  
22 acres in  
Denver



27%  
Of students  
receive tuition  
assistance



# THANK YOU

Polly Breit, Senior Vice President, CCS

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