

2014 CONFERENCE | JUNE 4-6, 2014 | SEATTLE

Critical Questions, Countless Solutions

Success: What Works Now

Frederic J. “Rick” Happy
Principal & Managing Director
CCS



\$316
BILLION



72%



5%

Philanthropy

2008

2013

“For Rich, ’13 Was Good for Making, and Spending, Money”

- New York Times





However ... Threats & Challenges



Lack of Public Support

Elitist Reputation

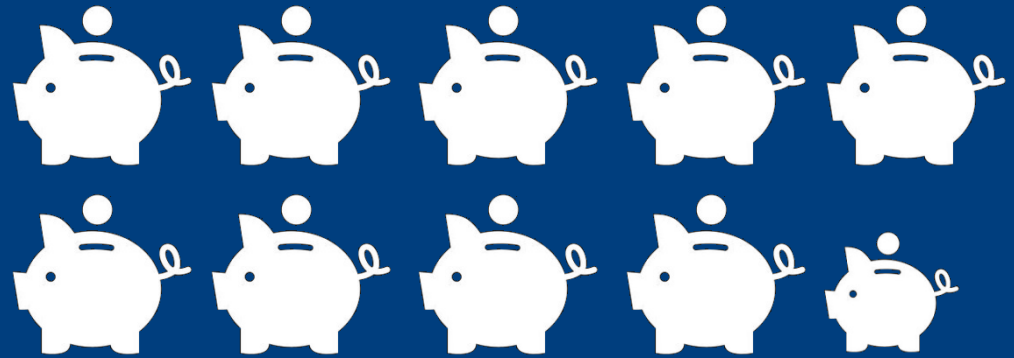
Structural Deficit

Disconnect



\$ \$ \$ \$ \$ \$

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Budget \$5M+

Budget <\$5M



Google Giveth:

***Organize The World's
Information***

Google Taketh Away:

**I'd rather give my
money to Elon Musk
than to a charity.**



**Tell me, what's
done more good for
the world: The Ford
Motor Company or
The Ford
Foundation?**



**Well, both
actually.**





Highest Growth in Philanthropy



Giving is Local



and Bifurcated



About 3% Give 70%

Stay Close



Philanthropy

=

Age



Why?



Impact

“You give \$5 million to medical research and it barely moves the needle. You give \$5 million to an arts organization, and it changes their world.”

- Anonymous American Philanthropist



Moving the Needle



Large Gifts to Philanthropy – 2014

Jay Jordan
\$75,000,000
Notre Dame

Robert Foisie
\$40,000,000
Worcester Polytechnic
Institute
Scholarships

Ken Griffin
\$150,000,000
Harvard
Scholarships

Fred Hamilton
\$100,000,000
Denver Art Museum

Keith & Katherine
Sachs
\$70,000,000
Philadelphia
Museum of Art

Tim & Jeff Ubben
\$50,000,000
The Posse Foundation

Robert Appel
\$20,000,000
Jazz at Lincoln Center

Marc & Lynne Benioff
\$100,000,000
UCSF

Recent Gifts to Orchestras

Richard M. and Helen
DeVos
\$20,000,000
Grand Rapids
Symphony
2013

Cleveland Foundation
\$10,000,000
The Cleveland
Orchestra
2013

James and Catherine
Emmi
\$2,000,000
Pacific Symphony
2014

Anonymous
\$2,000,000
Charlotte Symphony
2013

Anonymous
\$1,500,000
Milwaukee Symphony
Orchestra
2014

Richard and Mary L.
Gray Foundation
\$1,250,000
Chicago Symphony
Orchestra Association
2013

Michele Rehfeld and
Pat Atkins
\$1,200,000
Pittsburgh Symphony
Orchestra
2013

Jerry and Terri Kohl
\$1,000,000
Los Angeles Chamber
Orchestra
2013

Transformational Gifts to Orchestras Over the Past 10 Years

Joan and Irwin Jacobs
\$100,000,000
San Diego Symphony
2002

Anonymous
\$90,000,000
New World Symphony
2007

Annenberg Foundation
\$50,000,000
Philadelphia Orchestra
2003

Arison Arts Foundation
\$44,996,905
New World Symphony
2009

Jack Taylor Family
\$40,000,000
St. Louis Symphony
2000

Richard P. Simmons
\$29,500,000
Pittsburgh Symphony
Orchestra
2006

Arison Arts Foundation
\$28,618,776
New World Symphony
2008

Brown Foundation
\$20,475,656
Houston Symphony
2008

Millennials





Carole Cable

“I never thought it possible — my first texted lead gift.”



75% Give



63% Volunteer

Millenials Give 1/3 of What Matures Give





**To Half
as Many
Charities**

Online Giving Is



Growing

So...

What Works Now?



[Big] Data-Driven Strategy

Activity Metrics



A grayscale photograph of a woman with short, dark, wavy hair, smiling warmly at the camera. She is lying in a hospital bed, wearing a light-colored, button-down hospital gown. Her left arm is resting on her lap, and a black blood pressure cuff is wrapped around her upper arm. A medical professional's hands are visible, holding a black tube that connects to the cuff. The background is slightly blurred, showing what appears to be a hospital room with a window. The overall tone is positive and professional.

Grateful Patients?



What about Grateful Patrons?

Capture Ticketing Data to Identify Donor Potential

Screen

High Touches for VIPs

Leverage Membership
to Build Pipeline

Engage Your Board

OK, But



CEO/VP: Annual Visit





Provide Overview

**Share
Opportunities**

Ask

**Discuss Estate
Plans**



Host Events

Accompany CEO/
Dev VP on Visits



Ways to Engage

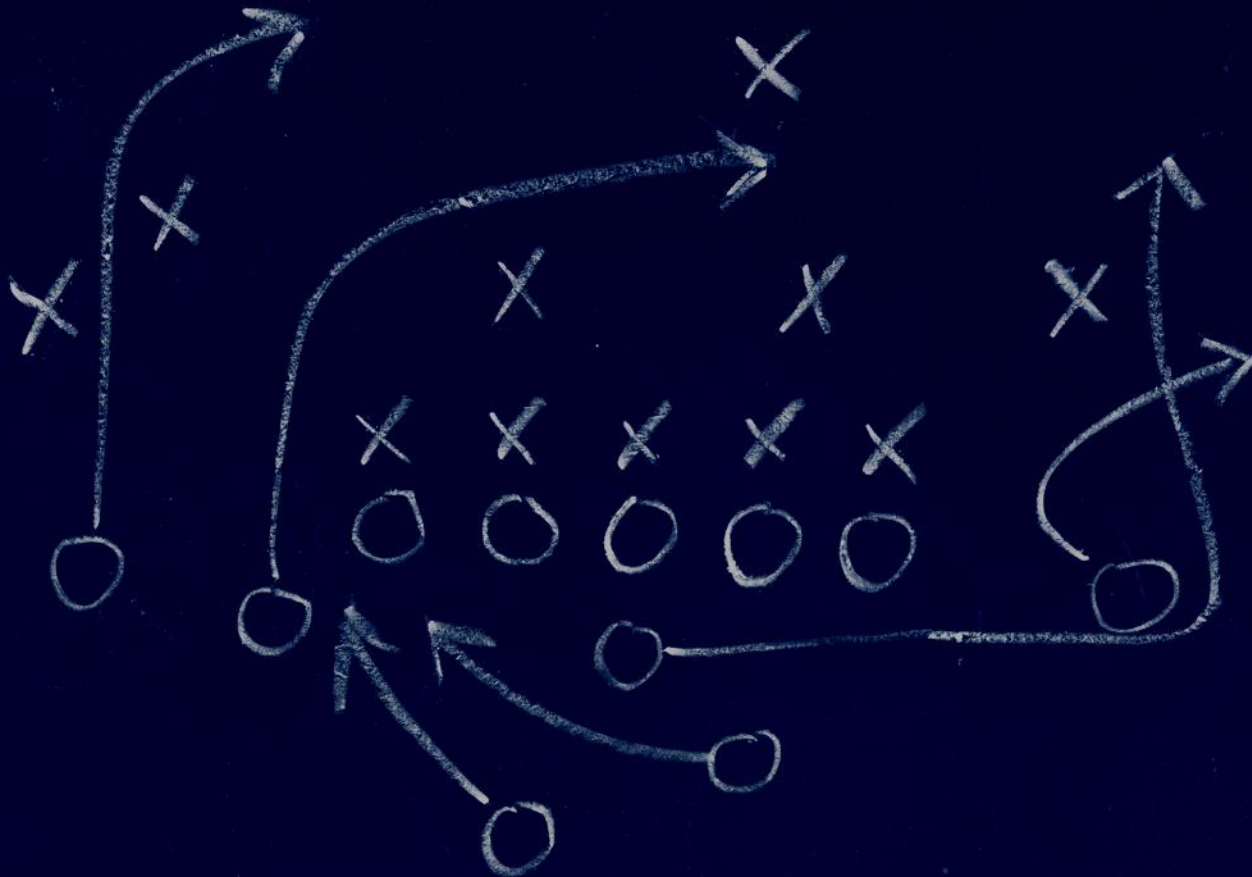
Make Intro Calls



Musicians



Change Tactics



What About Challenge Gifts?



~~impossible~~

Personal Specific Recognition Segmentation



Focus/Case

Where Potential Exists

Individuals

Say NO to Bad Ideas

Tell Stories



Ask for Money



Ask Yourself, “Is This Raising Money?”



Simple Prospectus

Face-to-Face Solicitations

**Outsource Low-
Level Gifts**

**Executive and
Artistic Staff**



DISCUSSION

Thank You!

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