



Get Your Capital Campaign *Out of Quarantine*

Presented by:
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Executive Vice President

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Capital Campaign Readiness



Time

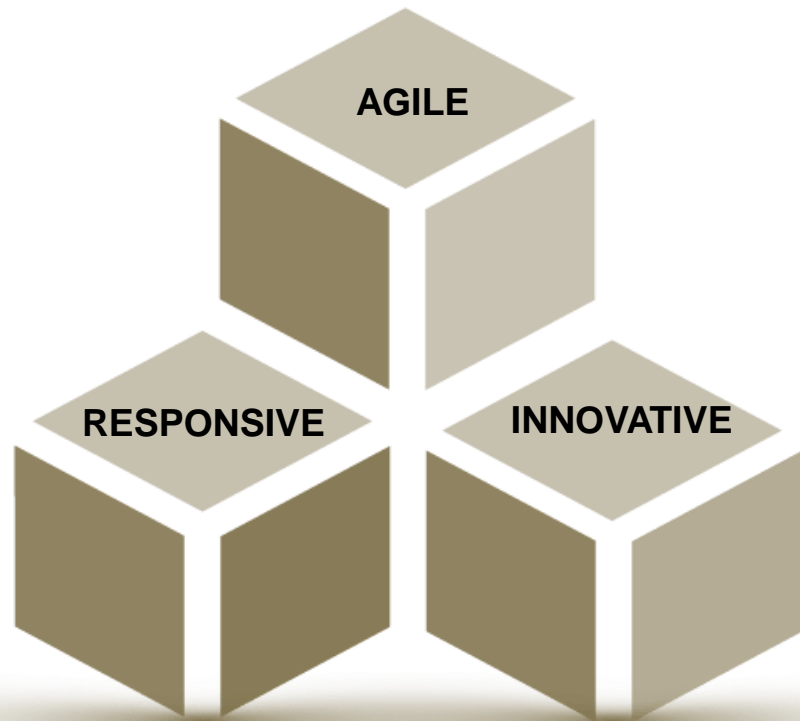


Institutional Needs



Philanthropic Support

About RUOTOLO ASSOCIATES INC.



- 41 years of service to the philanthropic community
- Full-service philanthropic consulting firm
- Divisions include:
 - RA NP “Nonprofit”
 - RA Search
 - RA Church Division
- Served more than 1,250 501(c)(3)s in all various sectors
- A diverse group of highly skilled consultants
- Member of The Giving Institute, the hallmark of ethical fundraising
- Part of the Collegium Family

Theresa A. Shubeck, Executive Vice President

- Ruotolo Associates Inc. – 25 years, serving:
 - Educational
 - Social service
 - Health
 - Arts
 - Faith-based
- 14 years on the institutional side
- Experience in:
 - Capital campaigns
 - Pre-campaign studies
 - Advancement program assessments
 - Board development
 - Executive search
- AFP-NJ Robert J. Smythe Outstanding Professional Fundraiser Award (2008)





March 2020...
What was Your
Campaign Timeline?

- About to launch a study?
- Already in the quiet phase?
- Ready to publicly launch?

We'll Cover Today

What has worked



What is still being learned



How we can stay focused as fundraisers



Lilly School of Philanthropy Update – Women’s Philanthropy Institute - Indiana University - October 2020

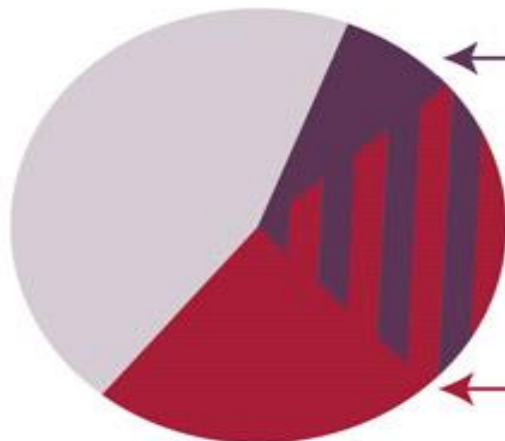
- Most households maintained their level of philanthropy from pre-pandemic levels
- Broadening of definition of giving
- Gender differences – women disproportionately impacted



During the initial months of the pandemic,

56% OF U.S. HOUSEHOLDS ENGAGED IN CHARITABLE ACTIVITY

in response to the crisis.



32%

GAVE DIRECTLY

to nonprofits, individuals, or businesses.

48%

GAVE INDIRECTLY

(e.g., by ordering takeout to support a restaurant or paying a stylist without receiving services).



**MOST HOUSEHOLDS
MAINTAINED THEIR
GIVING LEVELS**

but of those that reported changes,
**more decreased rather than
increased their giving.**



**WOMEN WERE MORE LIKELY
TO REPORT DECREASING
THEIR GIVING**

in response to specific elements
of the pandemic.

Abiding Principals - 1

- Individuals drive philanthropy
 - The economy drives individuals



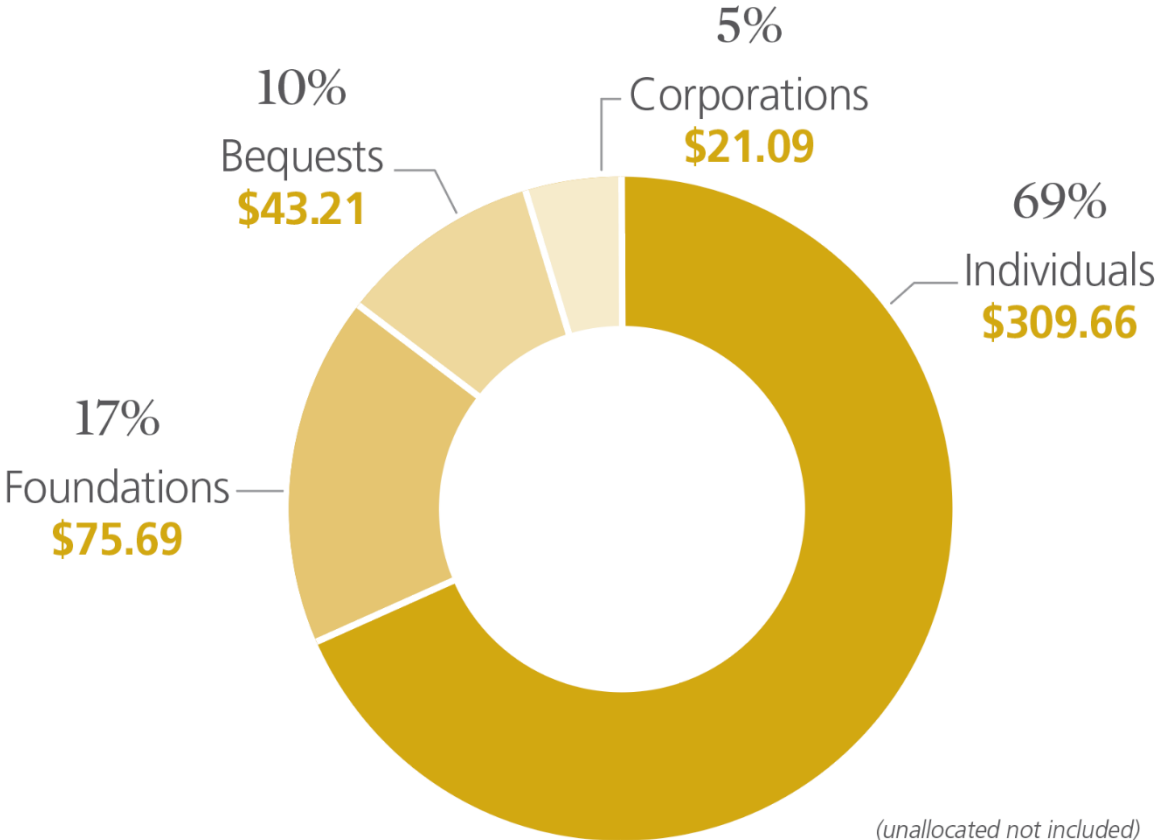
- No scenario where we advise campaigns to stop entirely



- Stay in the Top 3 of your donors' priorities



2019 contributions: \$449.64 billion by source of contributions



(in billions of dollars – all figures are rounded)

Abiding Principals - 2

- Pace with opportunity
 - New case elements
 - Impact






- Evergreen communications practices



- Be flexible and disciplined



Abiding Principals - 3

- Use a pause to your advantage 
- Turn excuse not to ask into opportunity 
- Leadership is #1 

Abiding Principals - 4

- Blended and planned gifts provide opportunity
- If necessary, request permission to ask for a gift
- Stay mission-centric



Case #1: Private School in NYC - just launched campaign

- Lead gift
- Increase communication
- Listen to the parents/constituency
- Adjust the project/construction
 - COVID requirements
- Time constraints of head of school



Case #2: Public College – Recent Campaign Announcement

- Final year/stage
- Highlighted equity and social justice
- Zoom opportunities with notable alumni
- Reassessed individualized collaborations by campaign cabinet members
- Celebrating campaign success – timing and new opportunities



Case #3: Faith-based Organization with International Reach – March Study Launch

- Conducted Zoom or phone interviews – efficient scheduling and no resistance
- Replaced regional focus groups (3) with 1x1 interviews
- Specialized e-survey with Priests
- 2,614 responses to constituency e-survey
- Utilized prominent YouTube presence of leader to promote study



Case #4: Social Service Agency – Eve of Study

- Inverted sequence – loyal mid-sized contributors engaged first
- Indicated increased philanthropy during pandemic
- Respondents desired a message of urgency
- Timing of gift personalized
- Benefit to a 2020 gift
- Not a natural constituency – both a challenge and an opportunity



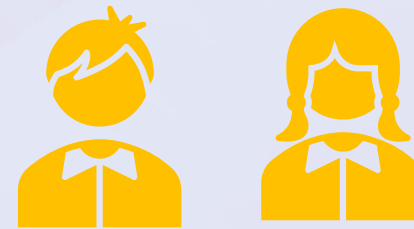
Case #5: New England Middle/Secondary School – About to Publicly Launch

- Approaching the opportunity to go public
- Extended the quiet phase – opportunity and strategy
- Continued personalized solicitation
- Pivoted to COVID relief, then integrated into case statement
- Articulated requirement for increased financial assistance/scholarships
- Increased web-based communications
- Alumni desire for connection



Case #6: Secondary School – Mid-Campaign

- Three 7-figure gifts in a \$6 million campaign -
Pyramid principle
- COVID and coed
- Mission expansion initiative
- Consistent and thoughtful messaging key
- Opportunity to connect or reconnect with campaign
donors and advanced gift prospects
- Adjust case with sensitivity



Case #7: Assisted Living Facility – New Campaign

- Emergent and significant financial need
- Visibility in the community
- Inexperienced staff
- Anchors: case/brand/message, leadership, major gift focus, staff development
- Listen and learn from prospects
- Video, social media, coordinated communication



Returning to Giving USA/Trends Leading into 2020

- Individual giving was buoyed by a strong economy in 2019
- Common thread is ***donors down and dollars up*** – major gift impact
 - Trend may continue with increased income inequality
- ***Donor Retention remains flat at 45%***
 - Opportunity to focus on participation, cultivation, and engagement of current donors – especially if considering a campaign

What Does this Mean Going Forward?

- ***Leverage technology*** ~ how we've connected during these crises
 - Creative engagement to cultivate donors – virtual/Zoom fatigue and etiquette
 - Accessible giving platforms to generate sustained support
- ***Tap into Donor Retention Potential***
 - Focus on cultivating relationships
 - Easier to retain than gain
 - 45% rate shows clear opportunity

What Does This Mean Going Forward? - 2

Innovation



Creativity



Adjustment



Relevance of your mission and your story
Investing in solutions and success



Q&A

THANK YOU!

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