



Empowering Boards: Overcoming Barriers in Fundraising and Communication

January 15, 2026



Today's Speakers



KRIS KUHNS

Senior Vice President
CCS Fundraising



Nana Oppong

Senior Vice President
CCS Fundraising

About CCS Fundraising



>75 Years

Most recommended strategic fundraising consulting firm



17 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 PARTNERS IN DC, MD, & VA



BROOKINGS



GEORGETOWN
UNIVERSITY

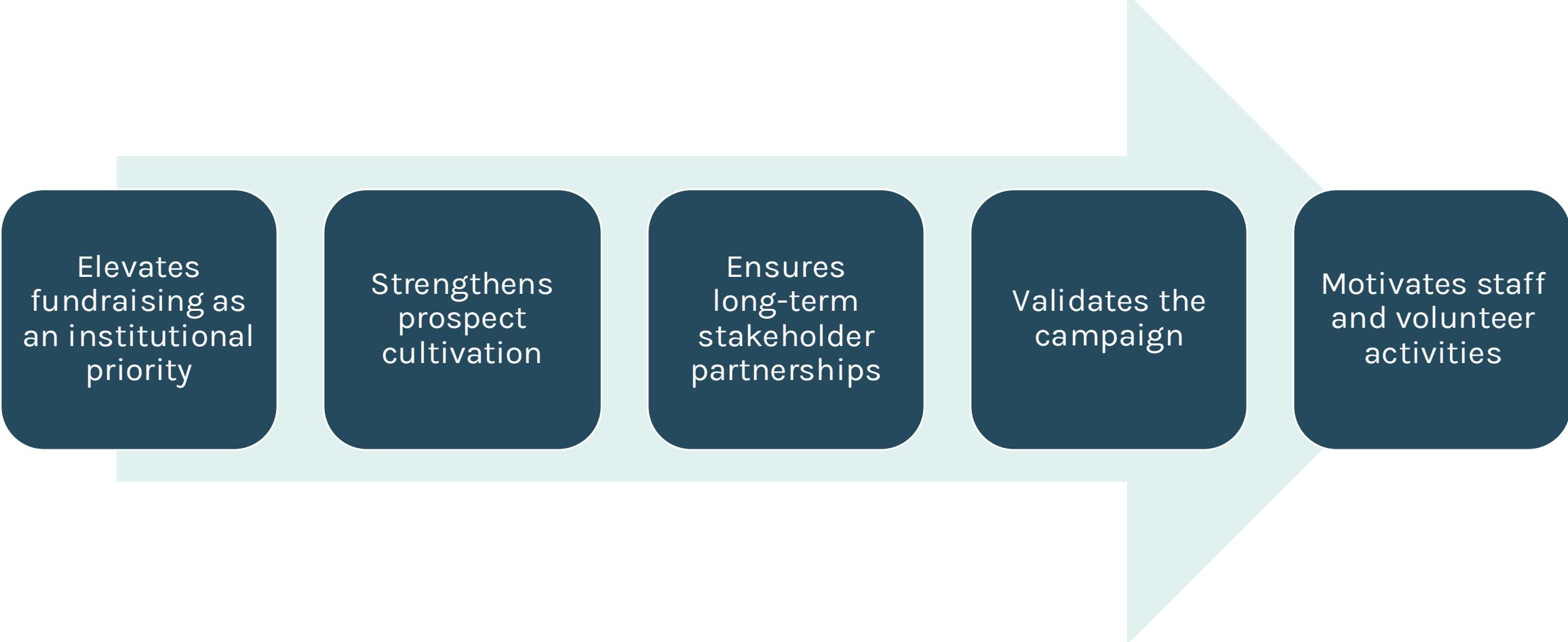


The PHI BETA KAPPA *Society*



Principles of Board Engagement

VALUE OF ACTIVE BOARD ENGAGEMENT



Elevates fundraising as an institutional priority

Strengthens prospect cultivation

Ensures long-term stakeholder partnerships

Validates the campaign

Motivates staff and volunteer activities

SEVEN ROLES OF AN IMPACTFUL BOARD MEMBER

ADVOCATE



Express confidence in the mission

PROSPECTOR



Engage in a prospecting session with Advancement

ATTENDEE



Engage in meetings and events

EXPERT



Be up-to-date on fundraising

DONOR



Provide stretch financial investment

VISITOR



Join a gift request meeting

STEWARD



Make calls to thank donors

Anything else?

BOARD GIVING STATS



46%

of nonprofits have 100%
Board giving

74%

average Board
participation

64%

of nonprofits require
contributions from Board
members

★ 100% ★

Board giving should be an
expectation

THE IMPACT OF AN ACTIVE BOARD

Typically, 75% - 80%+ of funds raised through major gifts efforts are secured by a Board member in three (3) ways:



Opening Doors



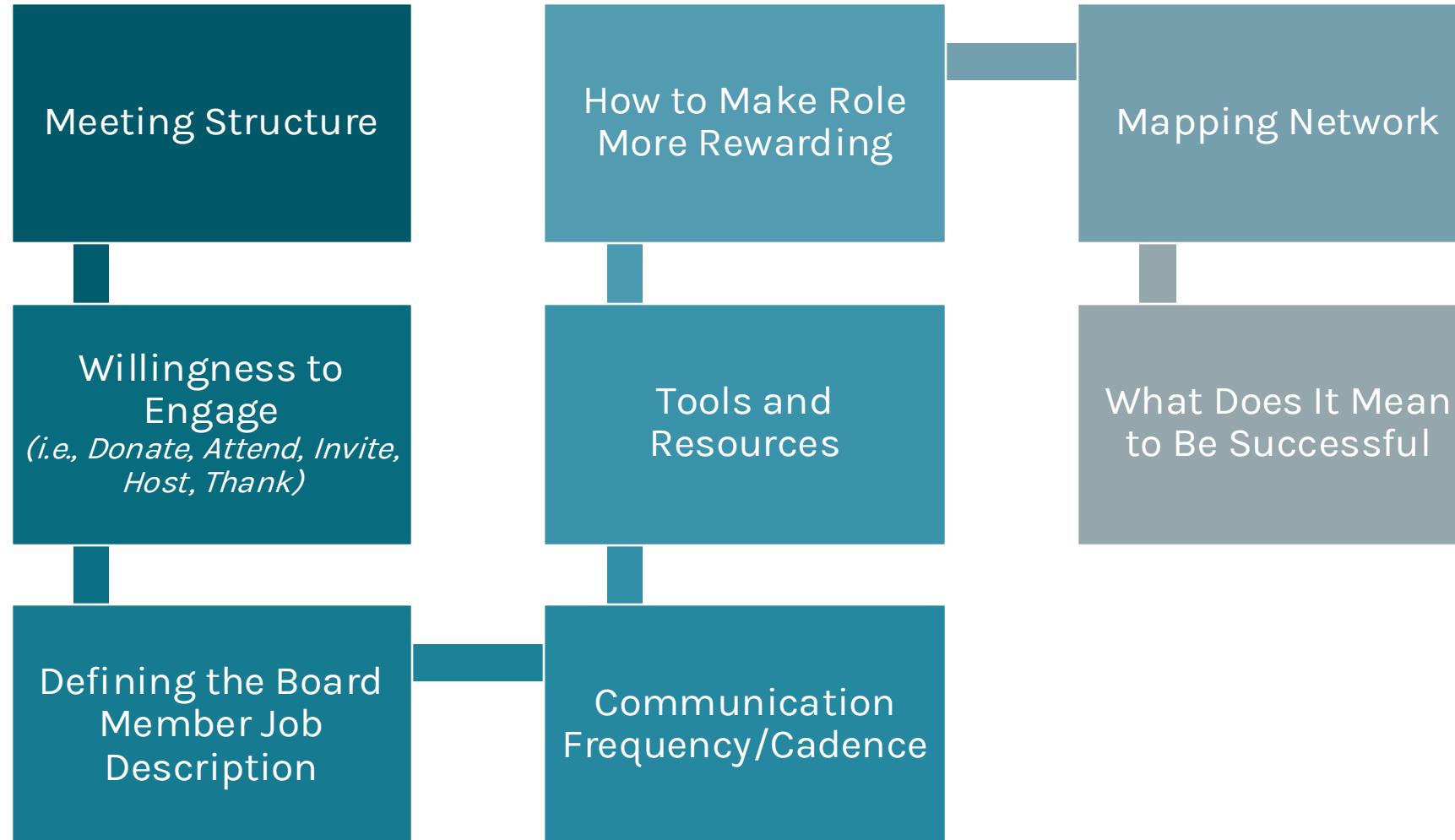
Engaging in Gift Requests



Supporting Financially

Measuring Success

FRAMEWORK FOR BOARD ASSESSMENT



BARRIERS & SOLUTIONS



Build Confidence in Fundraising Conversations



Debunk the Myth of a Perceived Limited Network



Education on the Power of all Gift Sizes



Empower them to Speak with Authority



Education them on their Role & Influence



Clarify Potential Information Gaps



Build Understanding of Brand Messaging



Ensure Access to Ready-to-Use Marketing Materials

THE BOARD'S PHILANTHROPIC RESOLVE: RUBRIC FOR SUCCESS

Expected Engagement

- Know the mission
- Understand the value proposition
- Be a proactive advocate
- Make the organization a top philanthropic priority

Active Engagement

- Help develop strategies
- Open new doors
- Engage in requesting gifts
- Help with donor stewardship

Exceptional Engagement

- Make “stretch” annual and campaign gifts
- Engage in “join me” gift requests
- Include organization in estate plans

WHAT STORY DOES YOUR RUBRIC TELL?

CORE RESPONSIBILITY	EXPECTED Engagement	ACTIVE Engagement <i>(includes all "Expected Engagement" expectations)</i>	EXCEPTIONAL Engagement <i>(includes all "Active Engagement" expectations)</i>
		TOOLS/RESOURCES BOARD MEMBERS NEED TO BE SUCCESSFUL	
ADVOCATE <i>express confidence in the mission</i>			
PROSPECTOR <i>engage in a prospecting session with Advancement</i>			
ATTENDEE <i>engage in meetings and events</i>			
EXPERT <i>be up-to-date on fundraising</i>			
DONOR <i>provide stretch financial investment</i>			
VISITOR <i>join a gift request meeting</i>			
STEWARD <i>outreach to thank donors</i>			
ADVOCATE <i>express confidence in the mission</i>			
PROSPECTOR <i>engage in a prospecting session with Advancement</i>			

QUESTIONS FOR DISCUSSION

1. Interpret the Data

- “Looking at your rubric, what patterns stand out? Which engagement category is strongest, and which needs the most attention?”*

2. Connect to Outcomes

- “How do these engagement levels impact your fundraising success? Where could improved engagement make the biggest difference?”*

3. Identify Barriers

- “What barriers might be preventing board members from moving from ‘Expected’ to ‘Active’ or ‘Exceptional’ engagement?”*

4. Resource Alignment

- “What tools or resources would help your board members advance to the next level of engagement?”*

5. Empowerment Focus

- “If you could change one thing tomorrow to empower your board, what would it be?”*

Data-Driven Storytelling: Turning Insights into Investment



THE VALUE OF STORYTELLING

Great stories...

- Connect a set of events, with a beginning, middle, and end
- Take the listener on a journey
- Persuade the listener
- Are not facts, figures, or lists

...yet, when facts and figures are interwoven into a story, it can pull at an audience intellectually and emotionally

Humans are not ideally set up to understand logic; they are set up to understand stories.

*- Robert Schank,
Cognitive Psychologist*



Storytelling Without Data

Community Need

Story: “Philanthropy is important because it funds critical programs. Increasing support would help more people.”

Why It's Weak: There's no sense of urgency or measurable difference—“more people” is too abstract.



Storytelling With Data

Data Insight: Retail revenue covers 90% of operations; philanthropy funds critical programs and expansion opportunities.

Storytelling Opportunity: “That 10% gap represents 1,000 individuals who need job placement. Increasing philanthropy to 15% means 500 more neighbors employed.”

What Does Data Do?



Data Creates Specificity



Data Builds Credibility



Data Drives Emotion Through Scale



Data Enables Personalization



Data Turns Stories Into Strategy

Importance of Data in Stewardship

IMPROVES THE DONOR EXPERIENCE

DRIVES REVENUE BY INSPIRING DONORS TO GIVE TO CAPACITY

INCREASES EFFICIENCY:
RETENTION IS MORE COST EFFECTIVE THAN ACQUISITION

01 IMPACT

62%

of donors want information on how a nonprofit plans to use their gift

02 SUCCESS

75%

of donors want information on results achieved with their gift

03 STORIES

64%

of donors want stories about people who were helped by their gift

Building a Culture of Impact Data Exercise

How do we prioritize the data that best tells our story? Together, can we:

Identify
core impact themes
that reflect mission

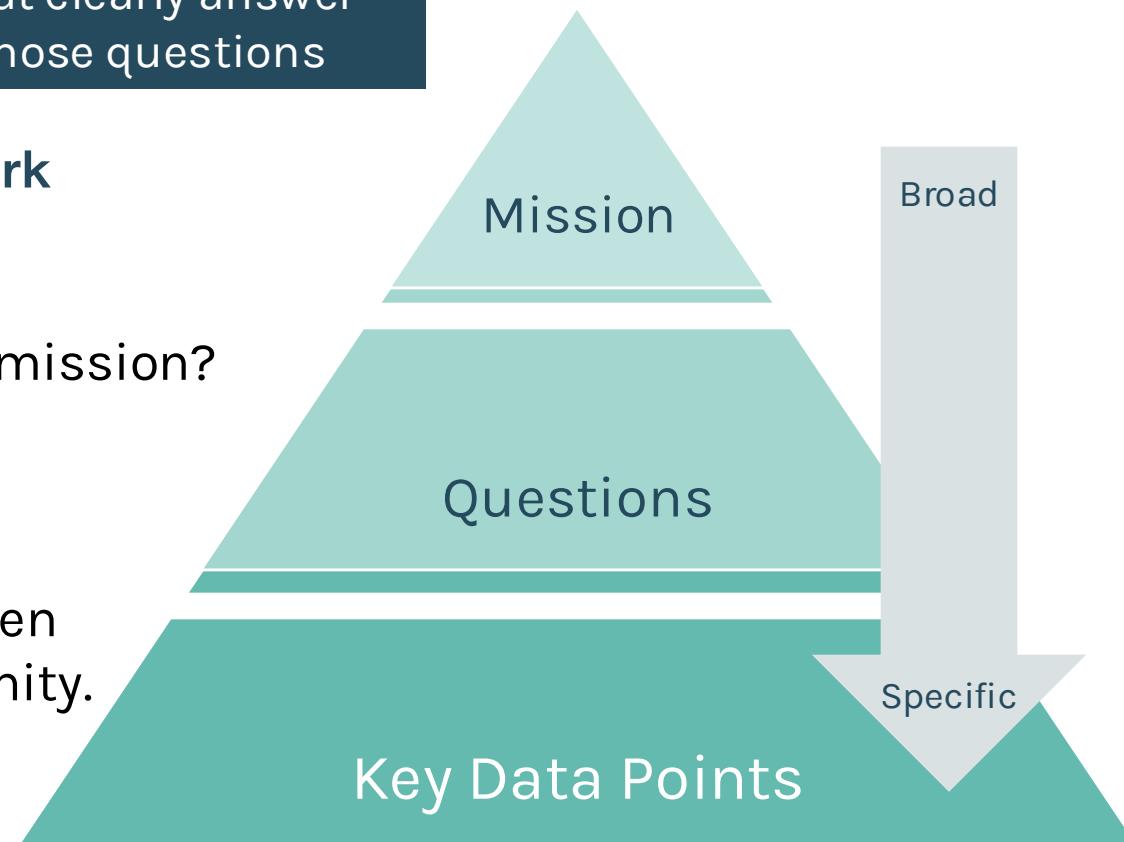
Define storytelling
questions that our
audiences care about

Determine data points
that clearly answer
those questions

By doing this, we create a **Storytelling Data Framework**
that illustrates the “why” behind the data:

- Are these data points the most compelling for our mission?
- How do they demonstrate the difference we make?

This framework becomes the foundation for
donor messaging, ensuring our narrative is data-driven
and resonates with donors, partners, and the community.



Flow of Discussion

MISSION/IMPACT THEMES (3)

Begin with the statement:
“The work we do every day...”

Ensures students have access to
life changing opportunities that
impacts the way they learn

QUESTIONS (6)

What do external audiences
want to know?

How many children/families are served by
the afterschool program every year?

What measurable difference did we make
in improving learning?

DATA POINTS (8)

What data points are necessary to
answer our questions?

of children served

Improvement in learning/test
scores/attendance at school

GROUP ACTIVITY

- 1 Review the Cases at your table.
- 2 Do the Cases convey a compelling story?
- 3 What would you change, add, exclude?



Your COVID-19 Response
Is Needed.

HELP NOW

COVID-19
Our Response



Together We Shine

It's our turn to light
the way forward.

Reimagine the Future of Teaching and Learning

At Sidwell Friends, teaching and learning are inextricably linked. Through this campaign, we will build our endowment to pay our extraordinary faculty and staff at the highest competitive levels. We will explore the best new models of teaching and learning. We will take the first vital step to unifying our campus, so that all our students can learn with and from each other on one campus, renewing Thomas Sidwell's vision of a Quaker school located