



Empowering Boards: Overcoming Barriers in Fundraising and Communication

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Today's Speakers



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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

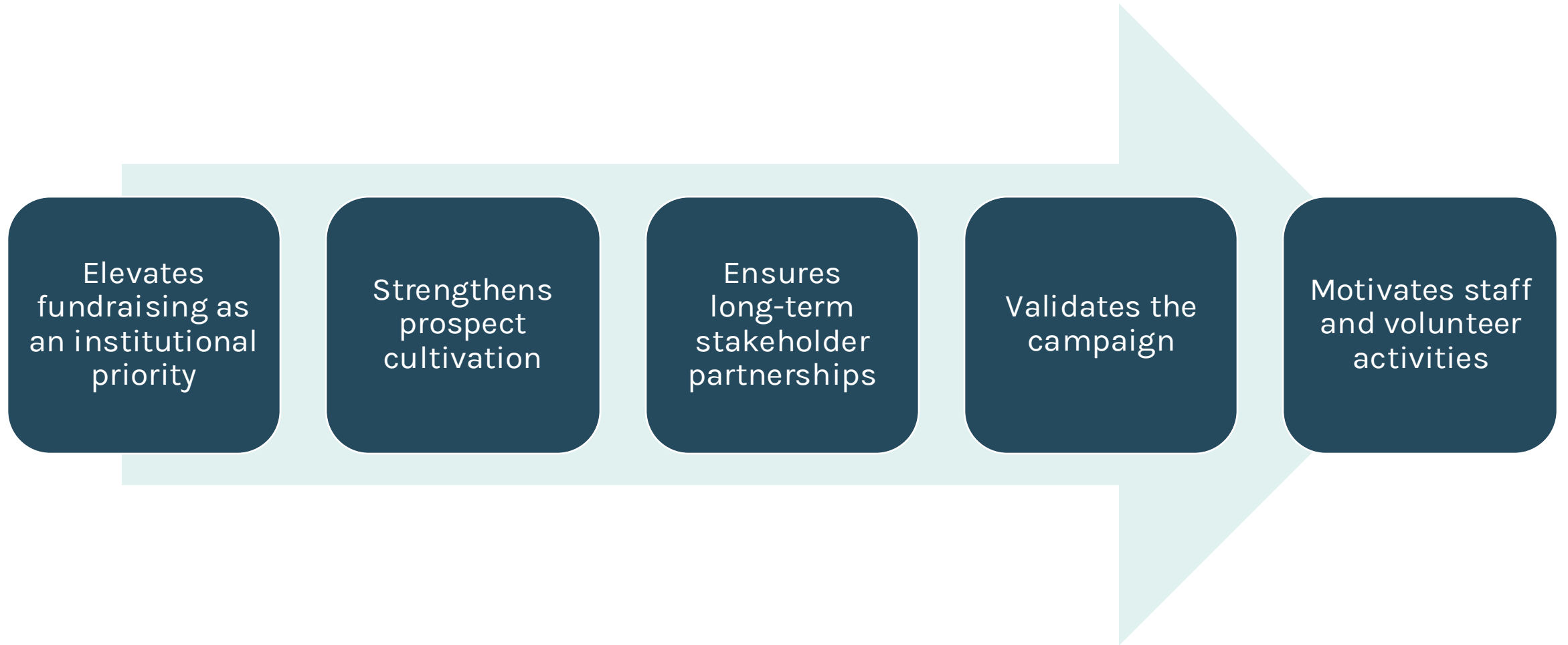
- Planning & Feasibility Studies
- Fundraising Campaigns
- Assessments & Audits
- Data Analytics
- Systems & Change Management
- Interim Development Management
- Strategic Planning & Development Projects
- Training & Leadership Development

SELECT PARTNERS IN DC, MD, & VA

Principles of Board Engagement

VALUE OF ACTIVE BOARD ENGAGEMENT



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

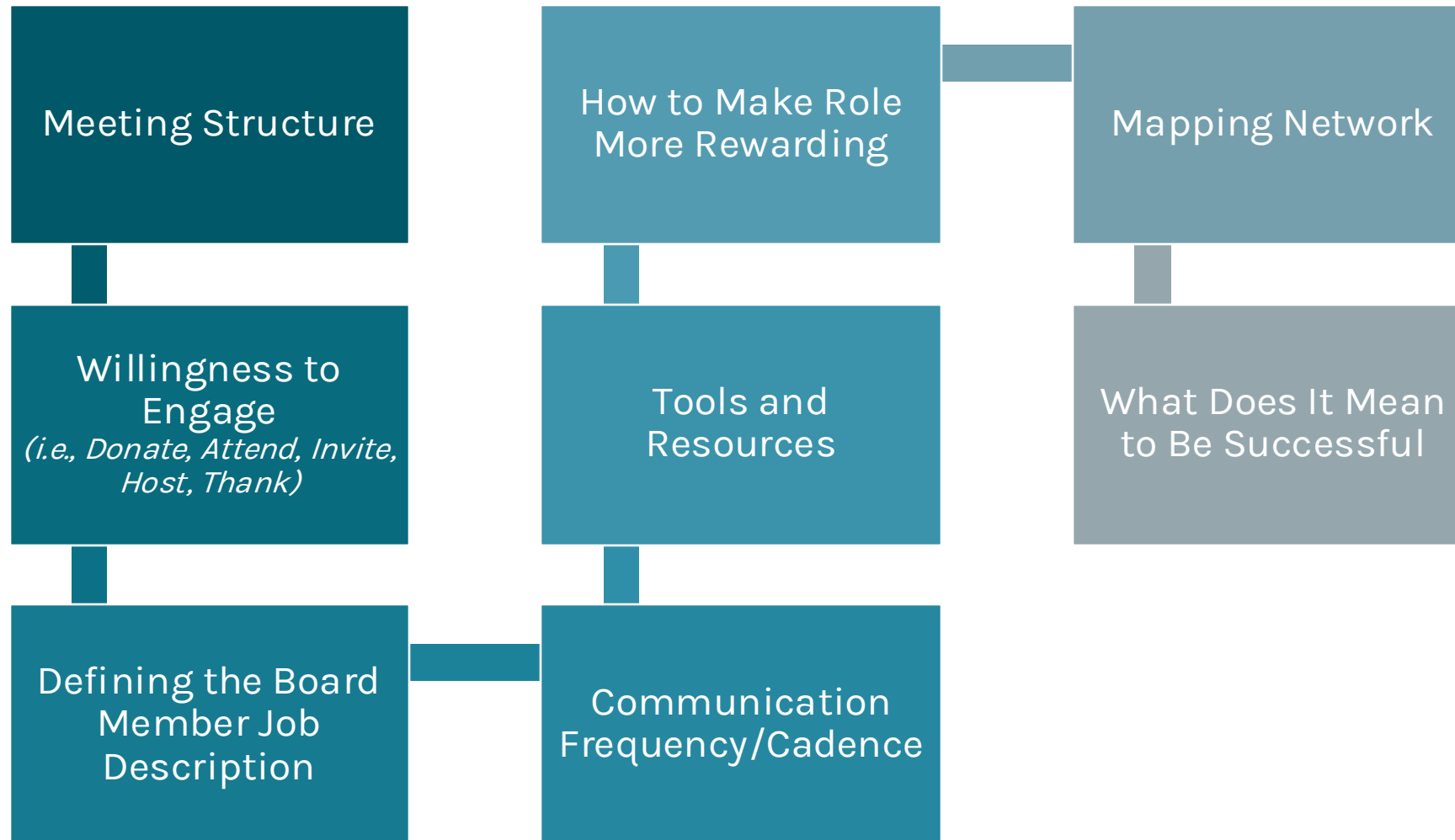


Supporting
Financially

Measuring Success

A thin teal line starts in the lower right quadrant and extends diagonally upwards towards the top right corner of the slide.

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?”*

A woman with short white hair and glasses, wearing a dark blazer over a white collared shirt, is shown from the chest up, gesturing with her right hand as if in conversation. The background is a blurred office setting. Overlaid on the left side of the image is a dark blue world map with a white dashed line and several vertical grey bars of varying heights, suggesting a data visualization.

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

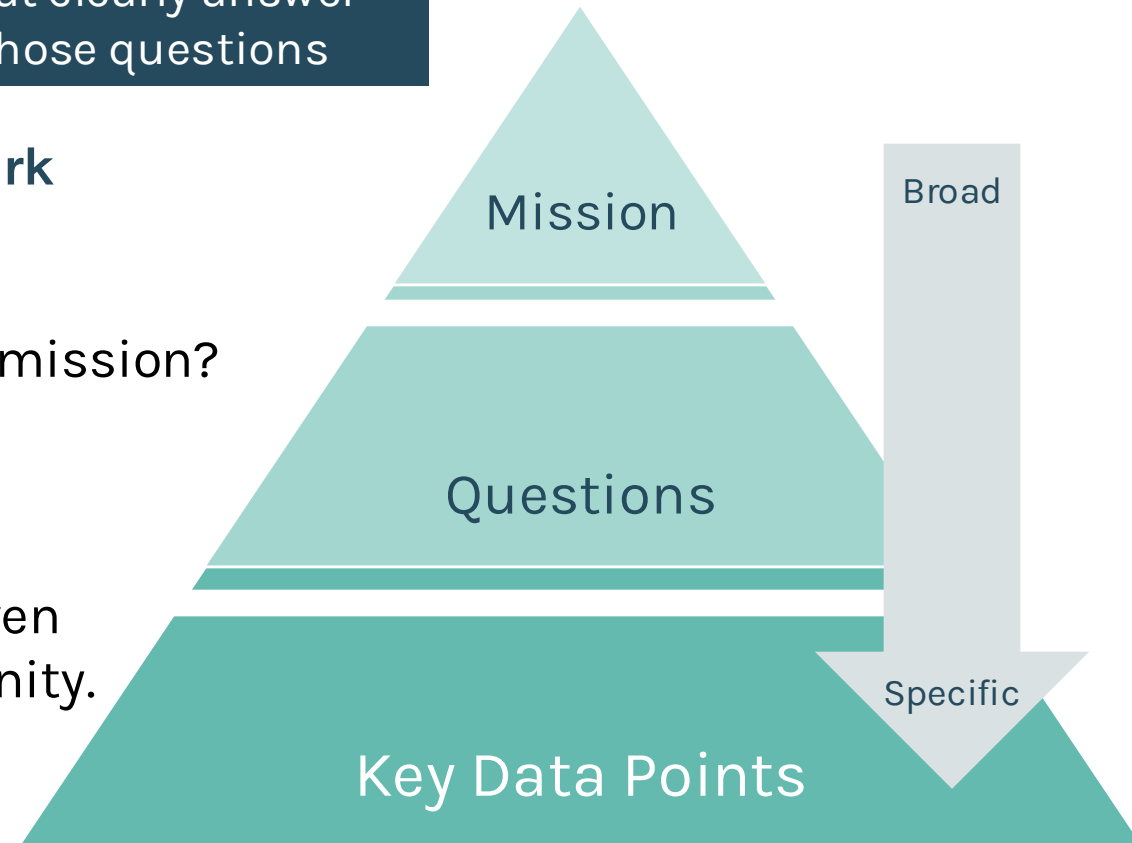
Define storytelling
questions that our
audiences care about

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.

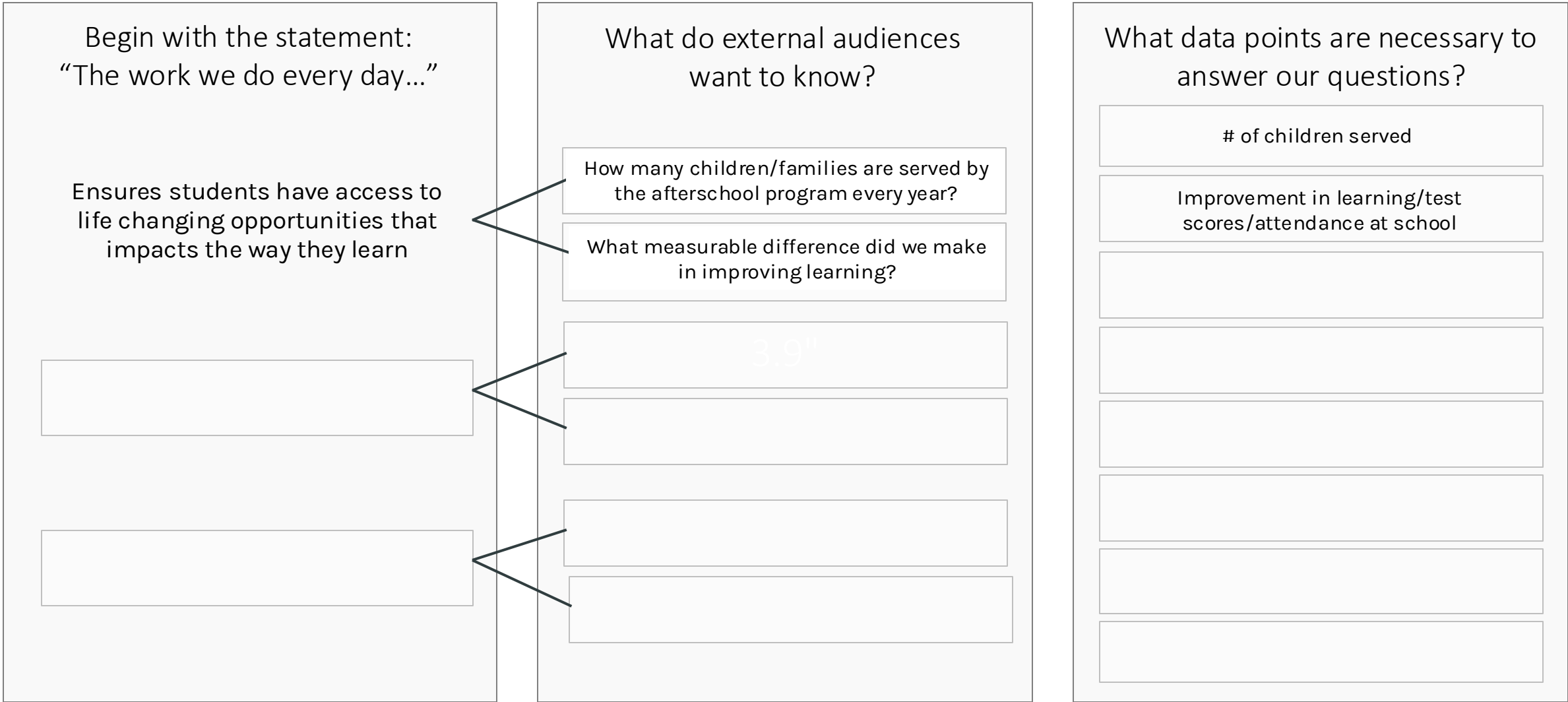


Flow of Discussion

MISSION/IMPACT THEMES (3)

QUESTIONS (6)

DATA POINTS (8)



GROUP ACTIVITY

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



THE FUTURE OF HISTORY

Campaign for the NATIONAL MUSEUM OF BERMUDA



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