Success: What Works Now

Frederic J. “Rick” Happy
Principal & Managing Director
CCS
$316 BILLION
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
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

25 miles
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
<table>
<thead>
<tr>
<th>Name</th>
<th>Amount</th>
<th>Organization/cause</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jay Jordan</td>
<td>$75,000,000</td>
<td>Notre Dame</td>
</tr>
<tr>
<td>Robert Foisie</td>
<td>$40,000,000</td>
<td>Worcester Polytechnic Institute</td>
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<tr>
<td>Ken Griffin</td>
<td>$150,000,000</td>
<td>Harvard Scholarships</td>
</tr>
<tr>
<td>Fred Hamilton</td>
<td>$100,000,000</td>
<td>Denver Art Museum</td>
</tr>
<tr>
<td>Keith &amp; Katherine Sachs</td>
<td>$70,000,000</td>
<td>Philadelphia Museum of Art</td>
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<tr>
<td>Tim &amp; Jeff Ubben</td>
<td>$50,000,000</td>
<td>The Posse Foundation</td>
</tr>
<tr>
<td>Robert Appel</td>
<td>$20,000,000</td>
<td>Jazz at Lincoln Center</td>
</tr>
<tr>
<td>Marc &amp; Lynne Benioff</td>
<td>$100,000,000</td>
<td>UCSF</td>
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</tbody>
</table>
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
<table>
<thead>
<tr>
<th>Transformational Gifts to Orchestras Over the Past 10 Years</th>
</tr>
</thead>
</table>
| **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
“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
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 HOW?
CEO/VP: Annual Visit
Ways to Engage

- Host Events
- Accompany CEO/Dev VP on Visits
- 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
Thank You!

Frederic J. “Rick” Happy
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