



# WOMEN & WEALTH

How Fundraisers Can Better Meet the Needs of Women  
and Empower Women to Build a Powerful Legacy.

October 2021



# Agenda

- I. Meet Our Presenters
- II. Goals for Today's Session
- III. Women & Philanthropy
- IV. Transformative Wealth from Women
- V. Key Fundraising Strategies to Adopt
- VI. Activity: Case Study

# Meet Our Presenters



**Elizabeth Wagner**

*Senior Vice President  
Director of Institutional Wealth Management  
Bryn Mawr Trust*



**Christopher Polito**

*Senior Vice President  
CCS Fundraising*



**Peggy DeAngelo**

*Assistant Vice President  
CCS Fundraising*

# About CCS



## 74 Years

Founded in 1947, we are the most widely recommended firm in the field.



## 90% Repeat or Referrals

Ninety percent of our business comes from repeat business or referrals.



## 7 Core Services

Our core services include campaigns, planning studies, assessments, research and data analytics, strategic planning, major gifts and endowments.



## 15 Offices

Our offices are in Philadelphia, Baltimore, Boston, Chicago, Dallas, San Francisco, New York, St. Louis, Seattle, Southern California, Toronto, Washington DC, London, Dublin, and Sydney.

10

## 10x Return on Investment

Our client partners experience five to more than ten times return on their investment.



## 95% Success Rate

We have achieved unprecedented success in fundraising for education, faith, human services, health, environment, science, arts and culture, associations, and policy.



# Our Mission, Values, and Vision

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In 2020, CCS partnered with more than 500 organizations and advised on more than \$15 billion in cumulative campaign goals. CCS strives to bring excellence, energy, and speed to each client partnership by adhering to our mission statement and values.

## MISSION

CCS partners with nonprofits for transformational change.

## VALUES

As a firm, and as individual colleagues, CCS strives to embody the following values in everything we do:

**EXCELLENCE**

**PROFESSIONALISM**

**INCLUSION**

**INNOVATION**

## VISION 2025

Be a leading catalyst for social impact around the world.

Be the most rewarding home for a diverse community of fundraising, philanthropy, and social impact professionals in the world.

Partner with an array of organizations generating positive social impact.

Pioneer the fields of fundraising, philanthropy, nonprofit excellence, and social impact, acting as trusted advisors and thought leaders.

# Our Commitment to Diversity, Equity, and Inclusion

## DEI Mission Statement

CCS is committed to building and developing a global team of compassionate professionals that reflects the world and communities in which we live. One where our employees; regardless of race, color, religion, gender, gender identity or expression, sexual orientation, parental status, national origin, different abilities, age, veteran status or other invisible traits; are valued, are provided the opportunities to contribute equally, and are rewarded equitably. We believe in the importance of creating an equitable environment where everyone receives fair treatment, recognition for their accomplishments, and equitable compensation. CCS will ensure that everyone has equal access to leadership development and growth opportunities within the firm. We are committed to be a workplace that supports our team members to achieve the highest level of success.

We know and exemplify that there is strength in diversity. We believe that building a fair, just, and equitable world begins right here with us.

To fulfill this vision, we commit to taking specific, measurable actions to recruit talented professionals and encourage retention, support professional development, respect and learn from all cultures, and create a vibrant community.

VALUING  
INCLUSIVITY

STRENGTHENING  
RECRUITMENT  
STRATEGIES

PRIORITIZING  
PROFESSIONAL  
DEVELOPMENT

CREATING A  
VIBRANT CLIENT  
COMMUNITY



# CCS and Greater Philadelphia

## EXCEPTIONAL HOSTS



## DISTINGUISHED SPEAKERS

**JANET HAAS**  
Chair, William Penn Foundation

**KEITH LEAPHART**  
Chair, The Lenfest Foundation

**DEBORAH O'BRIEN**  
SVP & Market Executive, Bank of America

**CORINNE O'CONNELL**  
CEO, Habitat for Humanity Philadelphia

**MIKE O'NEILL**  
SVP for University Advancement, Villanova University

**PEDRO RAMOS**  
President & CEO, Philadelphia Foundation

**KAT ROSQUETA**  
Founding Executive Director, Center for High Impact Philanthropy

**MONICA TAYLOR LOTT**  
EVP & CDO, Children's Hospital of Philadelphia

**RICHARD VAGUE**  
Former Chair, Museum of the American Revolution

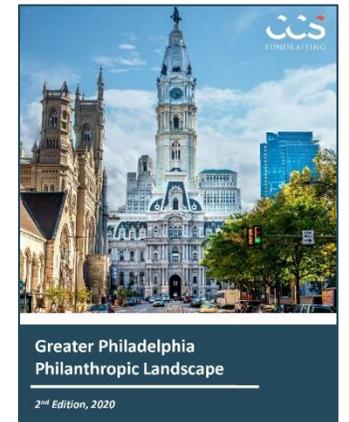
**DALILA WILSON-SCOTT**  
EVP & Chief Diversity Officer, Comcast Corporation

**PHILADELPHIA  
BUSINESS JOURNAL**

**Largest Philadelphia Metro Area Management  
Consultant Firms**

**FORTYUNDER  
40**  
PHILADELPHIA BUSINESS JOURNAL

**CEO  
AWARDS**  
PHILADELPHIA BUSINESS JOURNAL

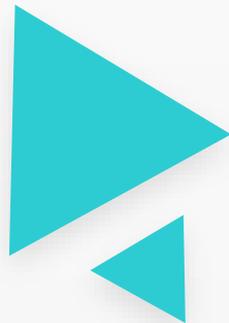


**PROUD MEMBERS OF:**



# Goals For Today

- I. Understand women's philanthropic activity & preferences
- II. Gain insight into motivations to give
- III. Learn strategies for discussing planned giving
- IV. Why does this matter?





# Women & Philanthropy

A person with long, curly hair is holding a one-dollar bill in front of their chest. The bill is held horizontally and is the central focus of the image. The background is dark and out of focus.

# The Great Wealth Transfer

By 2030, American women are expected to control much of the \$30 trillion in financial assets that baby boomers will possess.

- **What does this mean?**
- **What has it meant in the past?**

# Women in the US are well positioned to capture a significant share of money in motion.

**30%**

Increase in married women making household financial decisions (over past 5 yrs)

**5 Years**

Additional life expectancy for women vs. men in the US

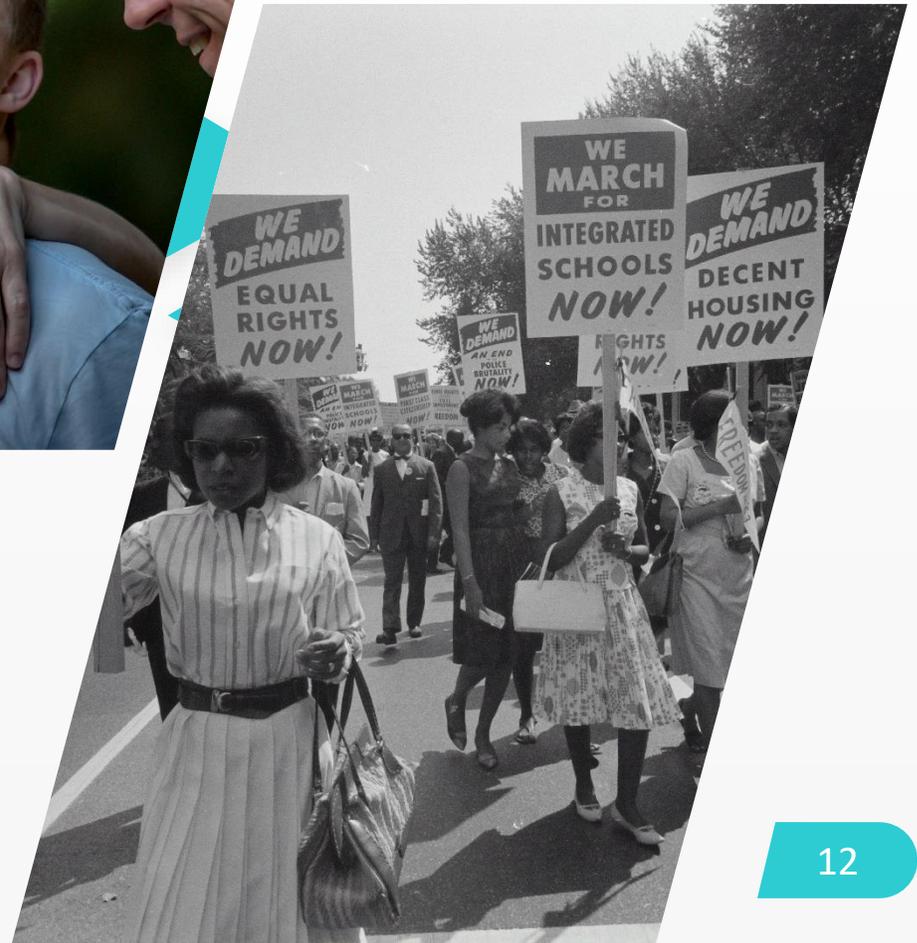
# Female Giving Behaviour

- Seek advice
- Make collaborative decisions
- Exercise strategic philanthropy
- More generous than men



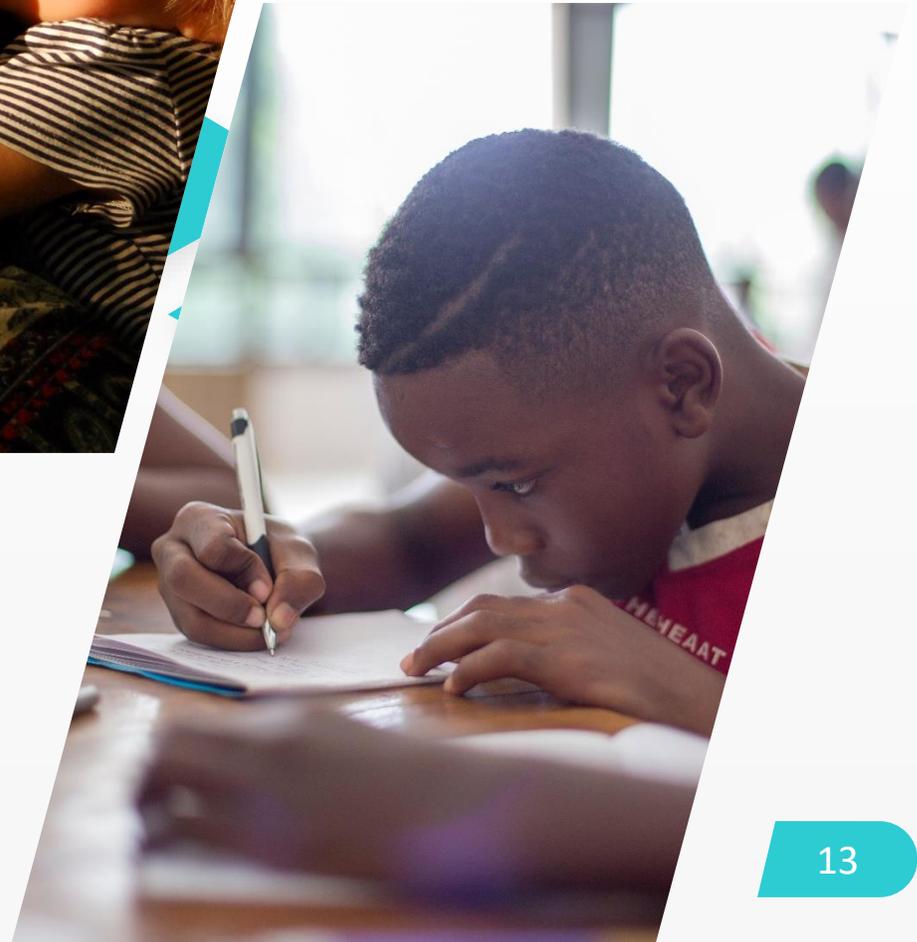
# Motivations to Give

- Personal connection
- Connections with family, communities, and the world
- Belief systems
- Trust in a cause and advisor



# Philanthropy & Family Values

- Values are inheritable
- Desire to pass down values
- Philanthropy is a tool for collaborative learning
- Sharing stories through the lens of family





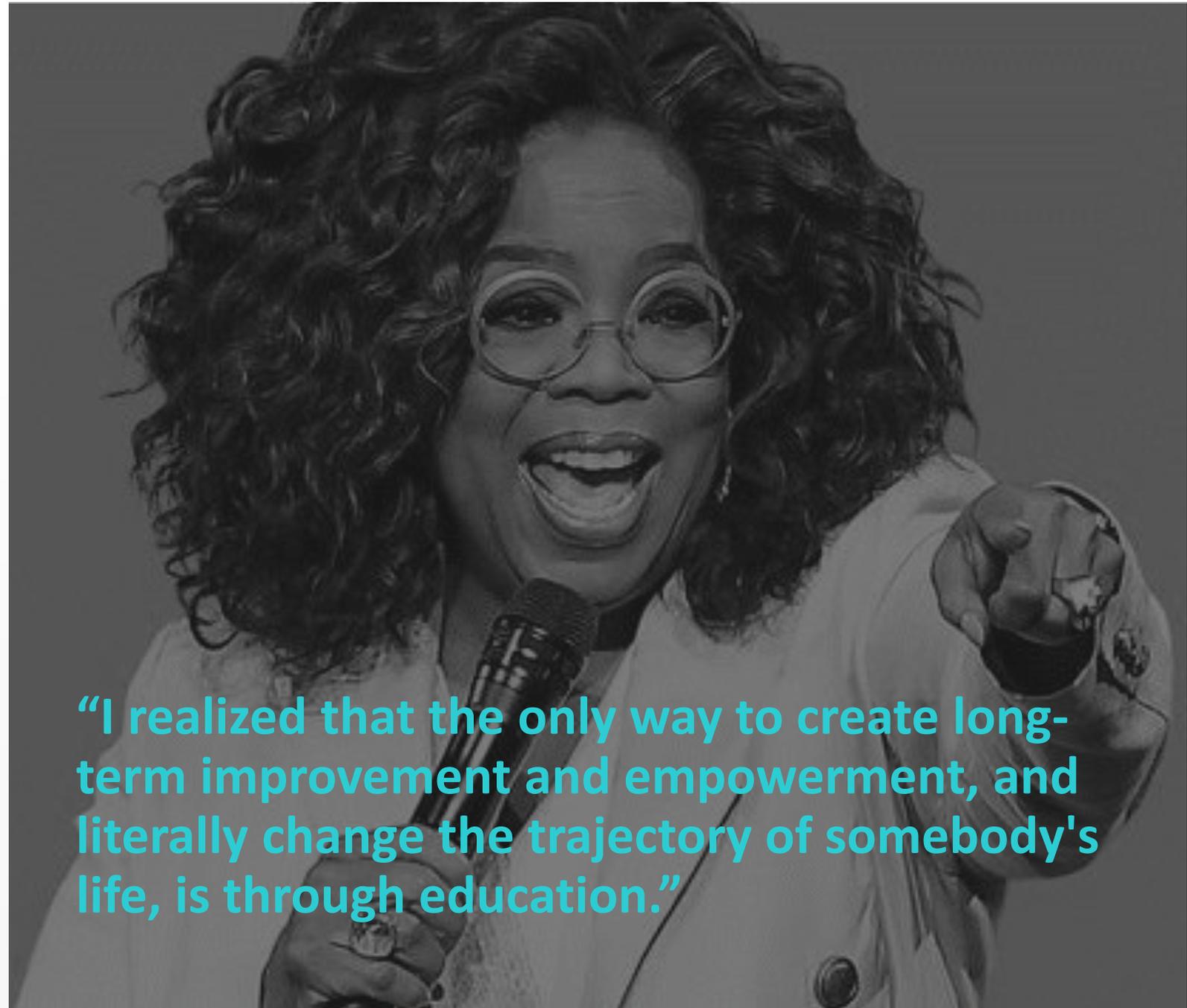
# Challenges

- Research/Identification
- Engagement
- Confidence
- Life-Goals
- Timing
- Gender Norms
- Organizational



Transformative Wealth  
from Women

# Oprah Winfrey



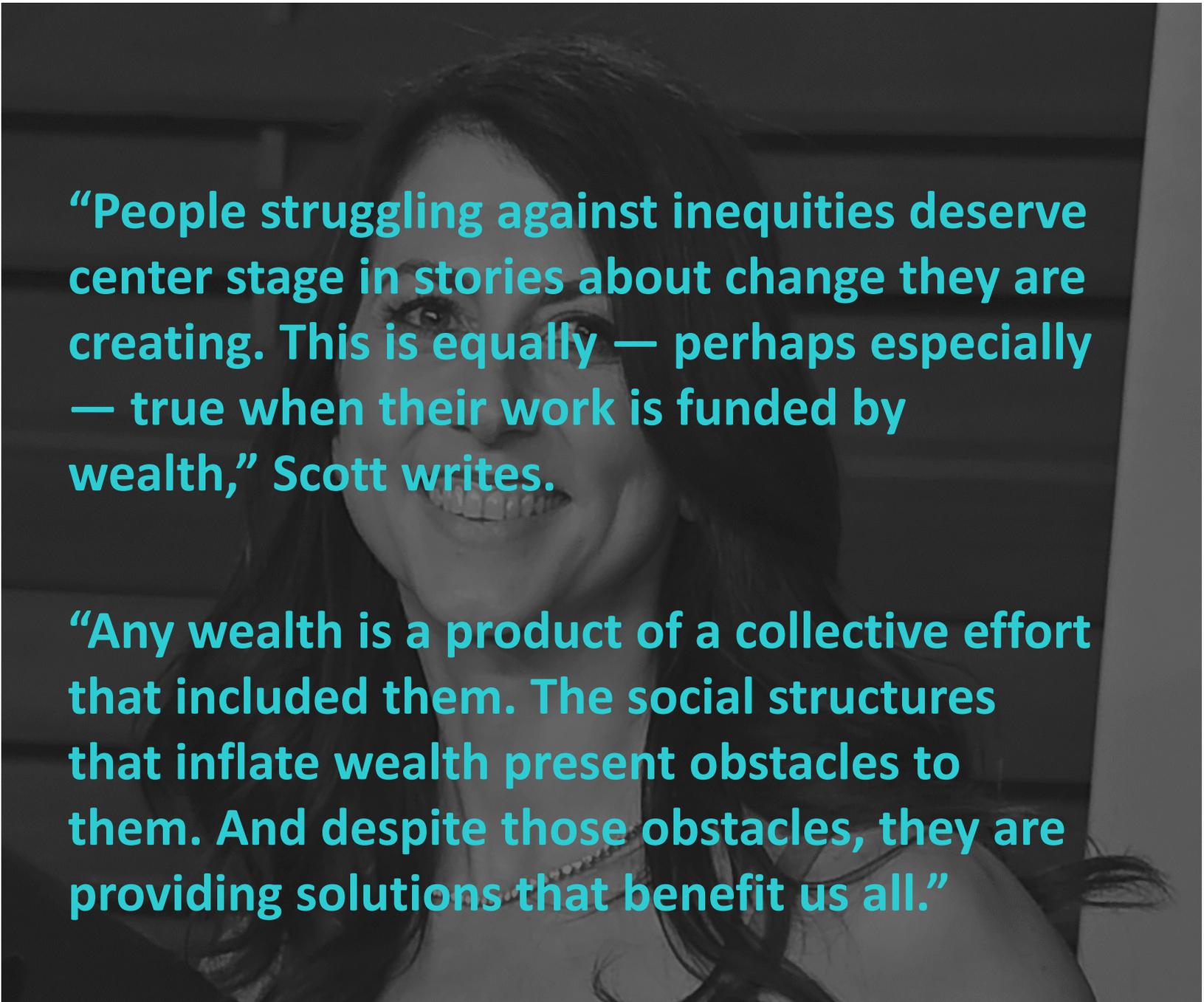
**“I realized that the only way to create long-term improvement and empowerment, and literally change the trajectory of somebody's life, is through education.”**

# Melinda Gates

“How can we summon a moment of lift for human beings—and especially for women? Because when you lift up women, you lift up humanity.

And how can we create a moment of lift in human hearts so that we all want to lift up women? Because sometimes all that’s needed to lift women up is to stop pulling them down.”

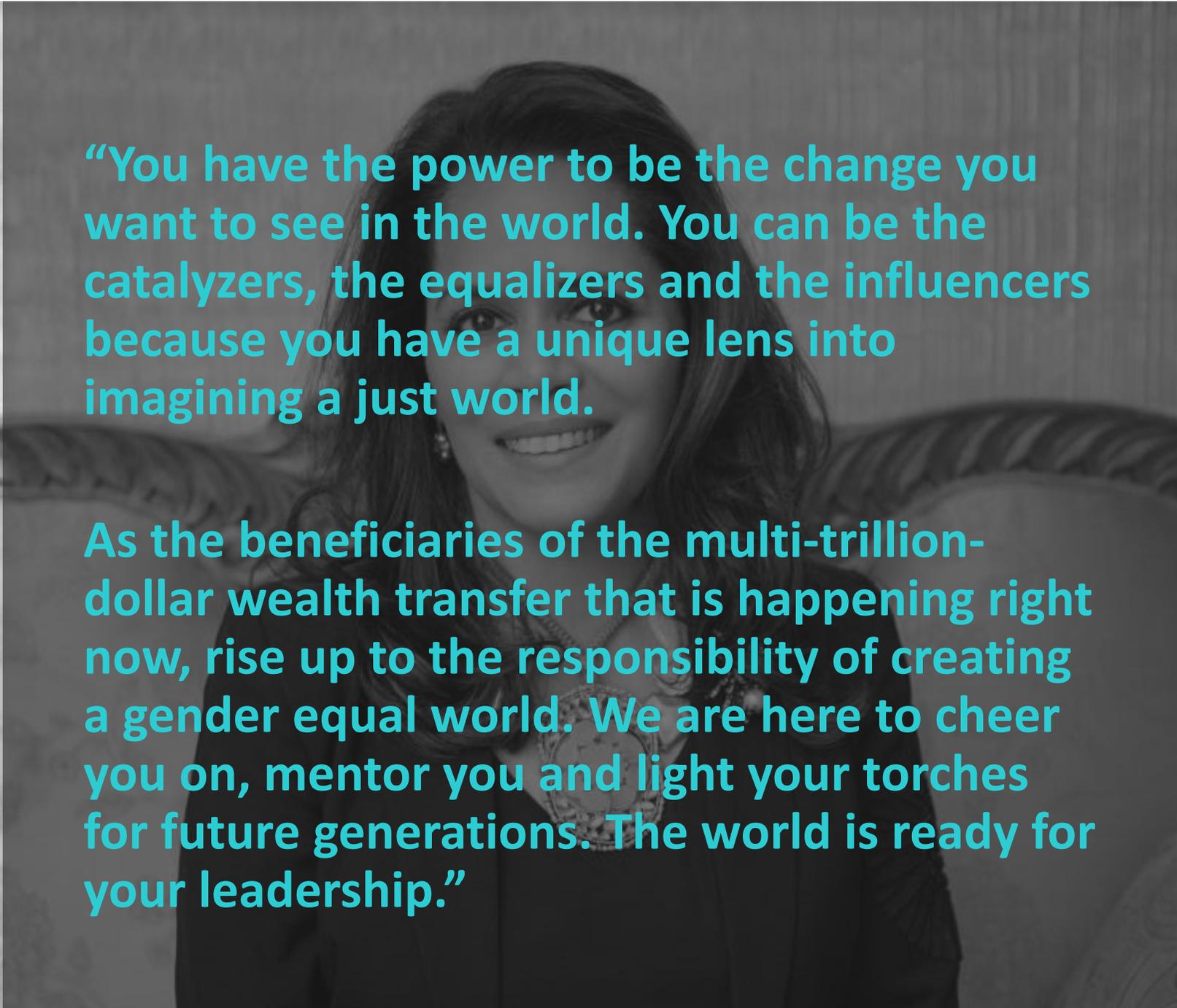
# Mackenzie Scott



**“People struggling against inequities deserve center stage in stories about change they are creating. This is equally — perhaps especially — true when their work is funded by wealth,” Scott writes.**

**“Any wealth is a product of a collective effort that included them. The social structures that inflate wealth present obstacles to them. And despite those obstacles, they are providing solutions that benefit us all.”**

# Mona Sinha



**“You have the power to be the change you want to see in the world. You can be the catalyzers, the equalizers and the influencers because you have a unique lens into imagining a just world.**

**As the beneficiaries of the multi-trillion-dollar wealth transfer that is happening right now, rise up to the responsibility of creating a gender equal world. We are here to cheer you on, mentor you and light your torches for future generations. The world is ready for your leadership.”**



# Key Fundraising Strategies to Adopt

# 1. Know your donor.



## **2. Build communities of and for women.**



### **3. Engage family members of current donors.**



## 4. Extend the cultivation period.



## 5. Build a customized and robust stewardship plan.



## 6. Empower and engage with younger generations.



## 7. Diversify your pipeline and audience.



## 8. Create a dedicated messaging strategy.



## 9. Be a trusted advisor.



# 10. Think big and innovate.





# Group Activity

# Case Study

A new couple has moved into town from Washington DC. They recently attended an event your organization held as a guest of a current Board member. The husband, George, is an attorney at the Board member's firm. The wife, Sallie, was formerly a policy analyst at a think tank in DC.

Your Board member mentioned that Sallie's philanthropic interests align most closely with your organization's mission – much more than George's.

- **What are your cultivation goals and how do you plan to achieve them?**
- **How do you approach the couple for a major gift solicitation?**
- **How do you engage Sallie specifically?**

# Group A Clue

Sallie was formerly a Board member at a peer organization that has a similar mission to your own. She anonymously named a building at that organization.



# Group B Clue

Sallie has two college age children, both of whom are named as trustees to Sallie and George's family foundation.



# Group C Clue

Sallie is a member of a women's giving circle and is a proponent for diversity. She strongly believes your board must be more diverse across all dimensions.



# Discussion



- **What are your cultivation goals and how do you plan to achieve them?**
- **How do you approach the couple for a major gift solicitation?**
- **How do you engage Sallie specifically?**



**THANK  
YOU**