



Dear colleagues,

Going back to the basics can be the best approach when developing a fundraising strategy. Case. Leadership. Prospects. Plan. It can be that simple. Create a compelling case statement. Engage your Board in telling your story. Focus on quality over quantity in your prospecting. And raise funds through in-person solicitations. Don't forget to close those gifts and steward donors to ensure recurring contributions.

- Dennis G. Serrette

Senior Vice President, Partnerships and Advancement



### Case Statements

**Is your case statement in need of an upgrade?**

- ❖ *Does it effectively tell your story?*
- ❖ *Is it compelling and visually appealing?*
- ❖ *Do you use it as a conversation guide and leave-behind for donors and prospects?*

We can help! Contact Molly Conway, our Project Rock representative from CCS Fundraising at [mconway@ccsfundraising.com](mailto:mconway@ccsfundraising.com), for quick, easy, and **free** assistance in renewing your case statement.

*"My case statement was dense, outdated, and ineffective for our Affiliate's fundraising needs. With the help of Project Rock, we have completely updated our case statement and use it to guide conversation about our Affiliate's impact and strategic vision. We are excited about the possibilities this helpful tool will offer as we cultivate prospects with this compelling case!"*

- Nancy Flake Johnson

CEO, Urban League of Greater Atlanta

### What's in an Ask?

**A Face-to-Face Request is 34 Times More Successful than an Email**

According to the Harvard Business Review and long-proven best practices from CCS Fundraising, face-to-face communication (e.g. solicitation) is 34 times more effective than text-based (e.g. mail, email) communication ([HBR Review Article](#)). While mail and email may reach more people, focusing on quality over quantity when it comes to major gift requests yields better results (e.g. gifts).

Fundraising best practices famously tout the 80/20 rule. 80 percent of your private funding **should** come from 20 percent of your donors. Investing time and effort into top donors and building strong, personal relationships offers the best ROI. Take a look at your donor list and identify your top 20 percent for cultivation. Research them, engage them, inform them, and when the time comes, ask them for a major gift **in-person**.

**Tip:** Need help with donor research? Call the Project Rock hotline at 212-558-5309 for assistance.

### New and Noteworthy

**Announcing the NEW and IMPROVED [www.projectrock.org](http://www.projectrock.org)!**



- ❖ New user-friendly interface for easier navigation
- ❖ Ten (10) new documents, templates, guides, and tutorials are available in the Toolkit
- ❖ Guest speakers from CCS Fundraising featured in our Executive Fundraising Academy bi-weekly webinar series. Visit the site to register for courses.
- ❖ FAQ page covering common inquires with step-by-step answers and links to helpful resources



### Board Development

Creating an effective board is a continual process.



### Insider Resources

**Board Evaluation Matrix:**

Tool for identifying the types of candidates your Board needs to recruit.

**Board Recruitment Prospectus:**

Editable and attractive 4-page document with organization background information and Board Member roles and responsibilities

**Board Fundraising Checklist:**

List of needed fundraising activities to engage your Board.

Download these resources and more [HERE](#).



### CEO Field Story

The Urban League of Middle Tennessee has long been over-dependent on event fundraising as our main source of revenue. The majority of our support comes from event sponsorships and ticket sales. As a new CEO, I look forward to

building a culture of philanthropy outside events. I have already begun to identify new individual major gift prospects and am working with my Board of Directors to strategically cultivate them and move them towards major gift requests. Through Project Rock, we are working to develop a more compelling case statement to better tell our story, share our impact and vision for the future, and request partnership. I look forward to sharing this new tool with our Board of Directors and using it during upcoming prospect meetings!

- *Clifton Harris*  
CEO, Urban League of Middle Tennessee



**Executive Fundraising Academy**

26 Courses



**Project Rock Toolkit**

46+ Downloadable Documents



**Project Rock Hotline**

100+ Callers



**Project Rock Newsletter**

430+ Recipients



**Project Rock Advantage**

16 Alumni Affiliates