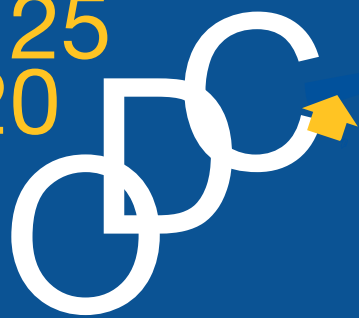


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Breakout Session

Uncertainty Ain't My First Rodeo: Strategic Leadership in a Shifting Nonprofit Landscape



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Vice President



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Sponsored By





Uncertainty Ain't My First Rodeo: Strategic Leadership in a Shifting Nonprofit Landscape

October 3, 2025



Today's Presenters



Claire Seifert

Assistant Vice President

CCS Fundraising



Christina Tatum

Vice President

CCS Fundraising

About CCS Fundraising

We partner with nonprofits for transformational change.

>75 Years

Most recommended strategic fundraising consulting firm

15 Offices

Across Europe, North America, and Australia

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

Our Experience in Austin



In 2024, CCS Partnered With...



Today's Roadmap

1

The
Philanthropic
Landscape

2

Strategic
Leadership
Framework

3

Building
Organizational
Resiliency

4

Audience
Q&A

The Philanthropic Landscape

There are varied and complex factors impacting nonprofits



Pressures shaping today's nonprofit leaders

Leadership & Organizational

- 1/3 of nonprofit CEOs expect to leave within 2 years
- Interim CEO appointments doubled (6.8% → 13.5%)
- 93% of staff feel direct effects of C-suite turnover
- Acquisition and retention remain top challenges
- Boards must act as stabilizing partners in times of transition

Internal Workforce

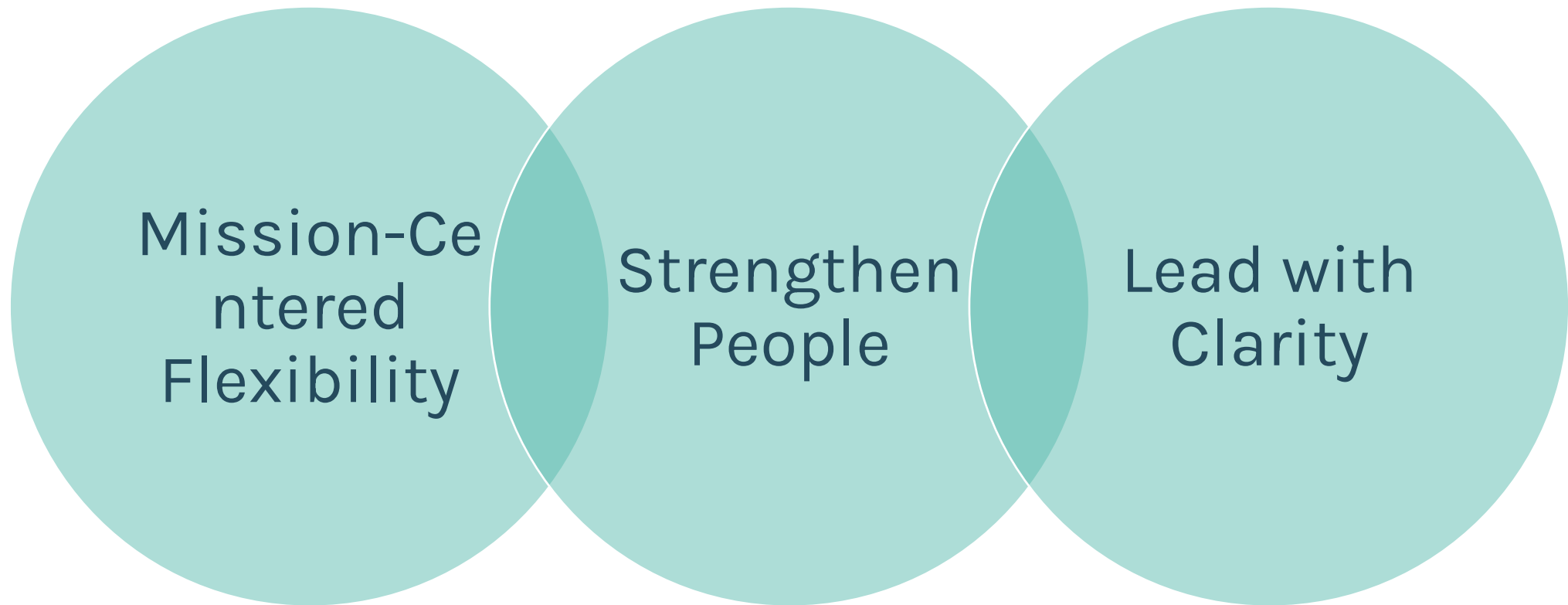
- Staffing constraints and resource limitations
- Shifting employee expectations (flexibility, purpose, career development)
- Organizational culture issues impacting retention

External Workforce

- Volatile funding sources (declining grants, federal shifts, cause urgency)
- Political tension and cultural polarization shaping decisions
- Increased public scrutiny and stakeholder demands

Strategic Leadership Framework

A framework for uncertain times



Mission-centered flexibility: flex the roadmap, protect the vision



Keep the mission and long-term goals steady

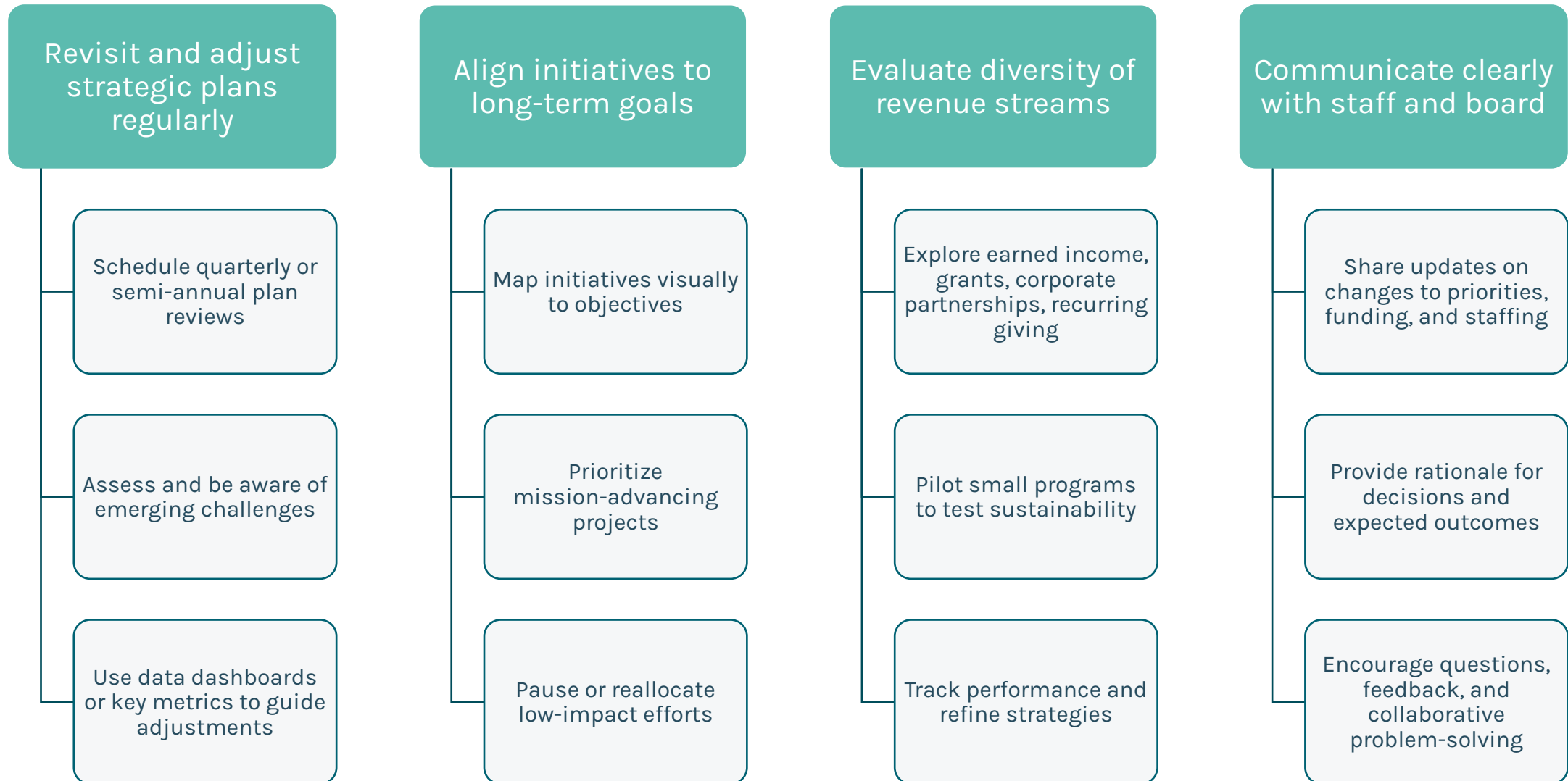


Adjust strategies and priorities as conditions shift



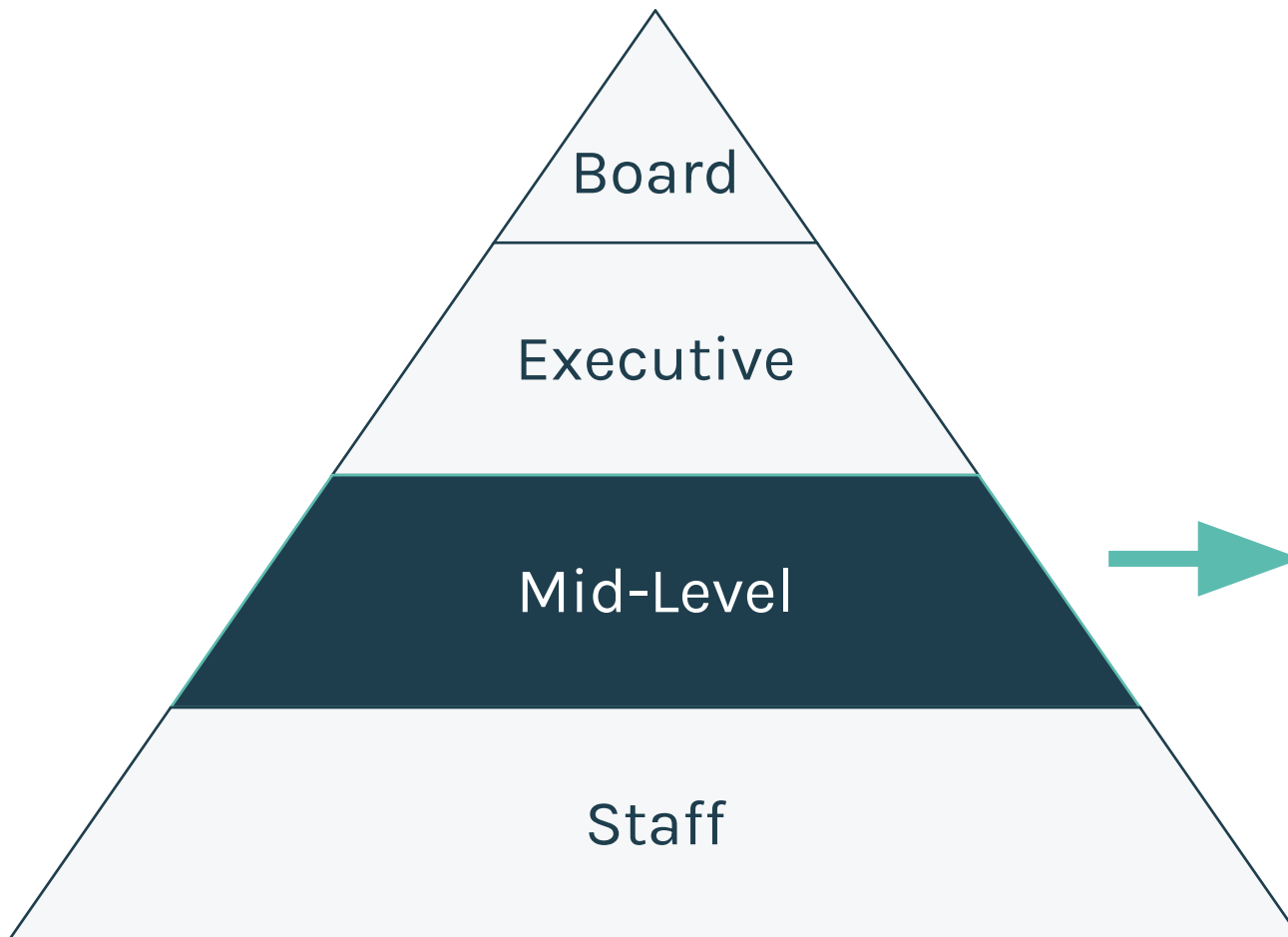
Bring staff and board along through clear, transparent updates

Practical steps to keep your plan on track



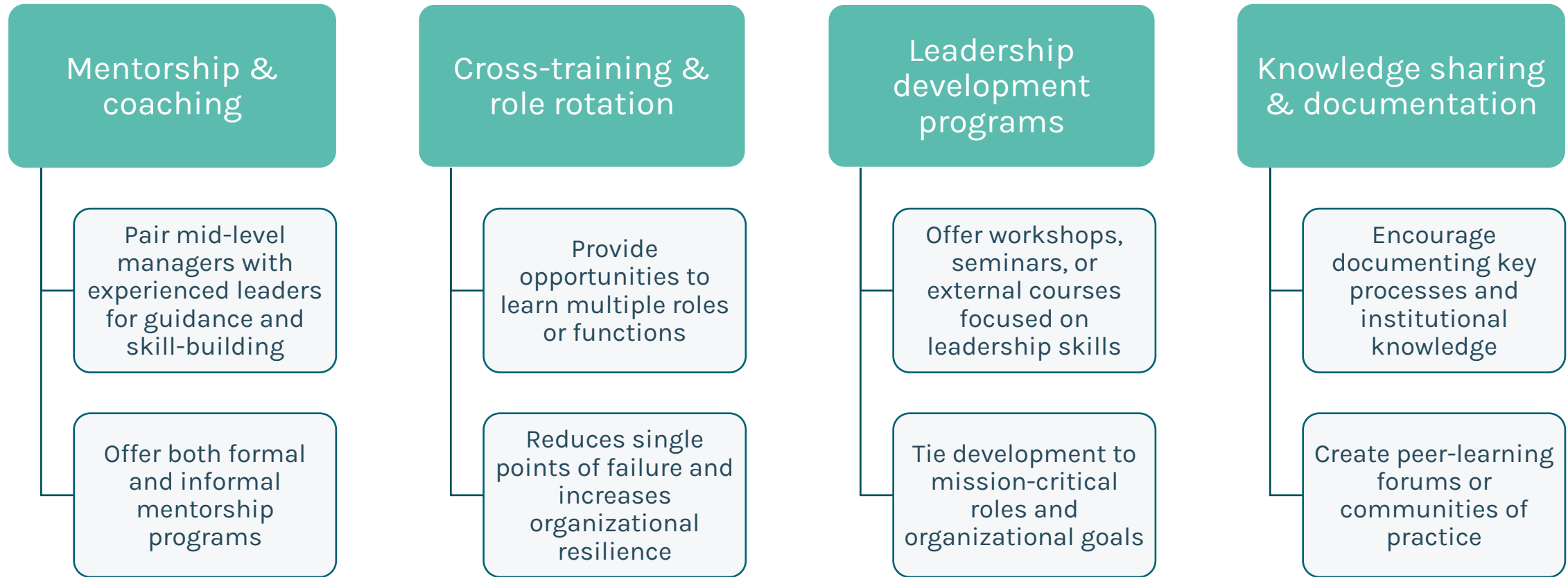
Strengthen people: invest in leadership at all levels

Mid-level management turnover can **double in uncertain times**, amplifying program disruption if unaddressed



Opportunities to invest in mid-level managers through **mentorship, cross-training, leadership development, and knowledge sharing** as stability anchors

Practical applications to strengthen mid-level managers

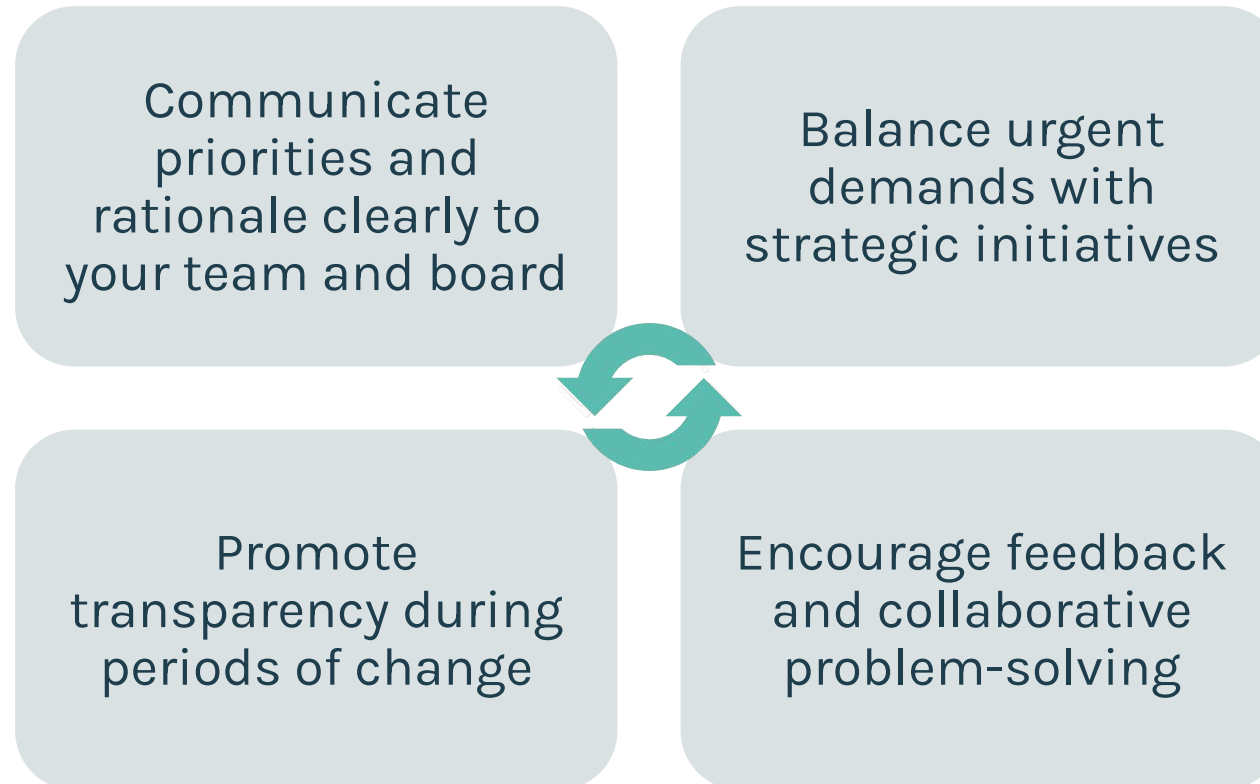


Reflection Prompt:

1. How are you currently investing in your people?
2. What practices have you found most impactful in building a strong pipeline of mid-level managers?

Lead with clarity: navigate complexity with confidence

Lack of visibility into decisions can cause **misalignment, slow decision-making, and weaken organizational resilience**



The clarity compass: a tool for decision making



Decision

Ask: Does this align with strategic priorities?

Rate impact:
High, Medium, or Low



Prioritize

Categorize tasks & decisions

	Urgent	Not Urgent
Important	Do	Plan
Not Important	Delegate	Delete



Communicate

Who needs to know?
(Staff, Board, Volunteers, Community)

How to communicate?
(Email, meeting, dashboard, one-on-one)

Key points: rationale, priorities, expectations



Feedback

Invite questions, suggestions, and clarification

Track responses and **adjust** plans, as needed

A case study for communicating the vision

How can leaders effectively share organizational priorities?

Strategic

A DREAM COME TRUE

Say Yes Scholarships open a world of possibility for students and the Cleveland community.

To be eligible for scholarships, students must continuously live in the Cleveland Metropolitan School District or City of Cleveland and enroll in a CMSD (or partner charter) high school from 9th- 12th grade. To receive a free postsecondary education, students need only to get accepted to college - a feat supported by Say Yes Cleveland starting in Pre-K!

We provide scholarships up to the value of tuition to all public universities, community colleges, and Pell-eligible certificate programs in Ohio, as well as over 100 private colleges and universities across the nation.

SCHOLARSHIPS CREATE LASTING IMPACT ON STUDENTS & THE COMMUNITY

49% of CMSD's Class of 2019 enrolled in postsecondary education
This is up 5% from 2018

↑ There has been a 25% increase in the high school graduation rate from 56.0% in 2011 to 69.3% in 2019

More than **\$3 Million** in tuition has been paid to dozens of postsecondary programs at schools including: Ohio State, Cleveland State, Miami, Tri-C, Tufts, and Duke.

In our first class (pre-COVID), full time retention rates from Fall 2019 to Spring 2020 increased for CMSD graduates.

2018 **69%** 2019 **46%**
2020 **69%** 2020 **67%**
+18% increase in CSU graduation rates +21 increase in Tri-C graduation rates

1,170+ CMSD graduates enrolled in postsecondary programs through Say Yes Cleveland from the classes of 2019 and 2020

STUDENTS NEED OUR SUPPORT

We must continue delivering the tools that help our students, families, and community soar.

While our work has made great strides, significant work remains to continue building runways for the postsecondary education success of our students. More than 66% of CMSD students live in poverty and more than 95% are classified as economically disadvantaged.

Systemic racism and exclusion has exacerbated barriers to entry and success for minority communities across the Cleveland community.

Black, Indigenous, and People of Color have lower levels of educational attainment and higher unemployment rates. Additionally, they are more likely to work in lower-wage occupations than white and Asian populations.

The pandemic's impact on the postsecondary plans of some of our students has been profound and devastating.

Due to challenges presented by COVID-19, 167 CMSD students who previously shared intent to attend postsecondary schooling did not enroll, bringing the 2020 enrollment rate down to 39%. The pandemic allowed us to identify opportunities for growth we did not know existed. Now, we can do better as we learn and adapt. Our focused work is now more important than ever.

Postsecondary education is critical in uplifting Cleveland's economy.

By 2025, 65% of Ohio's workforce will need a degree or certified marketable skill. However, Northeast Ohio falls short with 34% of the region's population having received a two- or four-year degree and 21% having some training but no degree or certificate. In a post-COVID-19 economy the demand for credential workers is on the rise but Northeast Ohio produces 20% fewer graduates than the national average.

Source:
The Ohio Statehouse, "Aligning Opportunities in Northeast Ohio 2022 Report"
U.S. Census Bureau, 2014-2018 American Community Survey 5-year estimates

Tactical

Mid-Term Priorities

Tactic	Owner	Priority		
		0-6 months	6-12 months	12+ months
Campaign media plan, including:	CMPA			
✓ Project announcement	DevComm/CMPA		✓ Completed in November 2024	
○ Campaign announcement	DevComm/CMPA			
○ Major gift announcements	DevComm/CMPA			
✓ Identify and media train spokespeople	DevComm/CMPA		✓ Completed in November 2024	
✓ Draft and distribute project talking points	Amelia		✓ Completed in November 2024	
Speaking engagement strategy	Amanda/Jeni			
Identify sponsorship opportunities	Amanda/Jeni			
Grateful patient stories				
DAR communications plan - Pathways, Checkup, Forefront, etc.	DevComm			
✓ Identify donor recognition opportunities for capital campaign			Some identified, can continue throughout	
✓ Identify donor recognition opportunities for programmatic campaign			Ongoing (Pathways published April 2025)	
✓ Assign values for donor opportunities			✓ Finalized: Approved by leadership, reviewed by Steering Committee, stored in Teams	
Work with early donors on recognition	Amanda/Jeni		✓ Finalized: Approved by leadership, reviewed by Steering Committee, stored in Teams	
Develop and manage inventory	Amelia/Jeni		✓ Finalized: Approved by leadership, reviewed by Steering Committee, stored in Teams	
			Inventory list is in Teams, need to continue to manage	

Ongoing Priorities: Campaign Management Roles

Stage	Task	Suggested Owner	Stage	Task	Suggested Owner
Discovery	Weekly review of gifts of \$1,000+ by unassigned donors with FTW address	Beckworth	Close and Follow Up	Draft gift agreement	Burke
	Prospect Research	Beckworth		Send gift agreement	Gleason
	Assign solicitors in Raiser's Edge	Stevenson/Beckworth		Track commitment in spreadsheet	Gleason
Cultivation and Briefing	Initiate outreach / coordinate with Steering Committee members as needed	Gleason	Stewardship	Record activity in Raiser's Edge	RM
	Direct cultivation strategy	Billings		Gift processing	
	Draft meeting materials and talking points and circulate to UTSW attendees	Brizicky		Acknowledgement letters / impact reports	Skaggs
	Lead meeting scheduling	Gleason	Events	Share recognition details	Gleason
	Debrief meeting and track activity	Gleason		Ensure commitment is linked to proposal and coded correctly	
Solicitation	Send meeting thank you note	Gleason		Generate and manage invitation list / RSVPs	Snead / Gleason
	Record activity in RE / link to proposal	Gleason		Secure host / dates for campaign home events	Gleason
	Direct solicitation strategy	Billings		Draft pre-event briefing and circulate to UTSW attendees and host	Gleason / Brizicky
	Draft individual proposals	Gleason / Brizicky		Follow-up / debrief with attendees and host	Gleason
	Draft corporate and foundation proposals	Gull		Capture all strategy notes and follow up with prospects as needed	Gleason
Reporting	Debrief meeting and track activity	Gleason	Volunteer Engagement	Manage Steering Committee activity	Gleason / Brizicky
	Send meeting thank you note	Gleason		Send weekly campaign update reports	Gleason
	Record activity in RE / link to proposal	Gleason/Beckworth		Raiser's Edge records and reporting	Stevenson / Beckworth

A peer discussion on communicating the vision

1

When facing difficult organizational decisions, how do you create a space for honest conversations with your team or board, and what strategies ensure those conversations lead to informed action?

2

How can you bring non-foundation team members into the conversation? (C-Suite leadership, program leaders, board members)

Building Organizational Resiliency

In times of economic uncertainty, philanthropy remains resilient

Strategies for navigating federal funding shifts

Conduct scenario planning and financial forecasting exercises.

Prioritize funding that empowers your institution to remain agile.

Continue to engage your donors and strengthen relationships.

Diversify revenue streams through investment in planned giving.

Strengthen your donor pipeline through a focus on retention and strategic upgrades.

Deepen synergies between philanthropy and system goals.

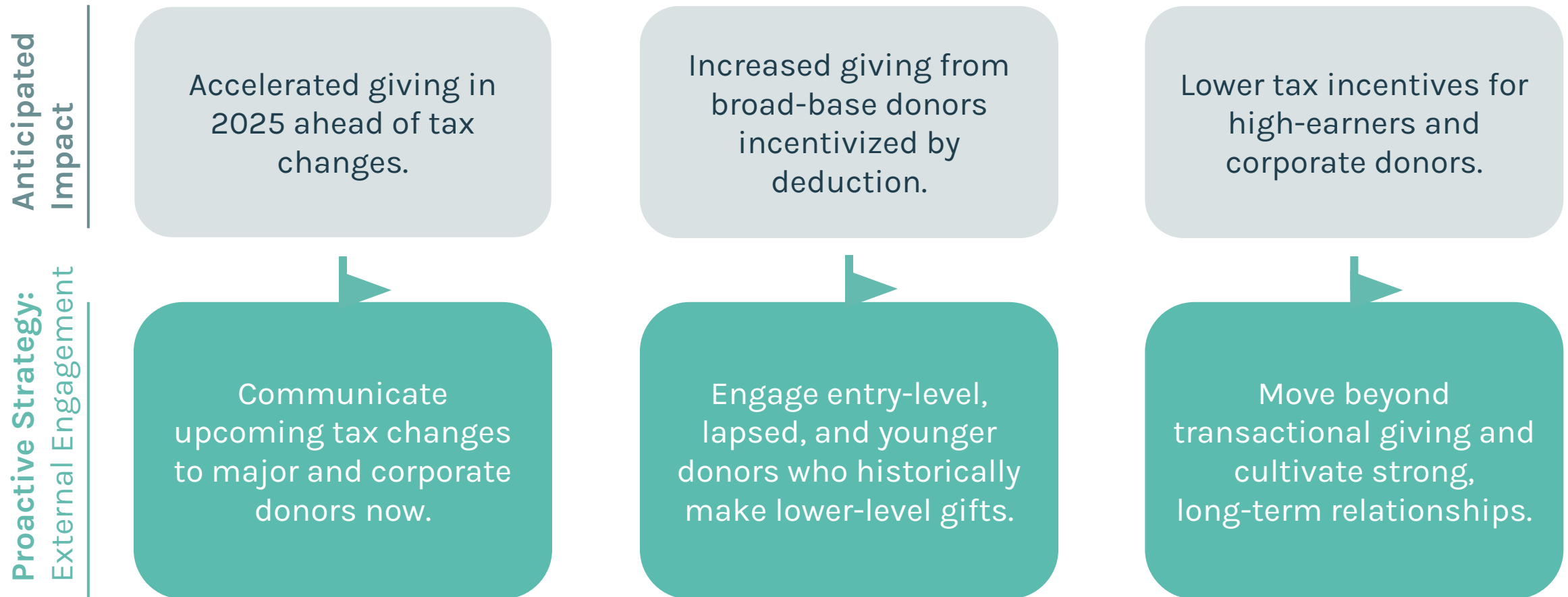
Educate yourself on the implications to serve as a partner in philanthropy to your donors.

Reflection Prompts:

1. How would you describe the current philanthropic climate for your organization or sector?
2. Has your organization made or planned any shifts in response to policy?

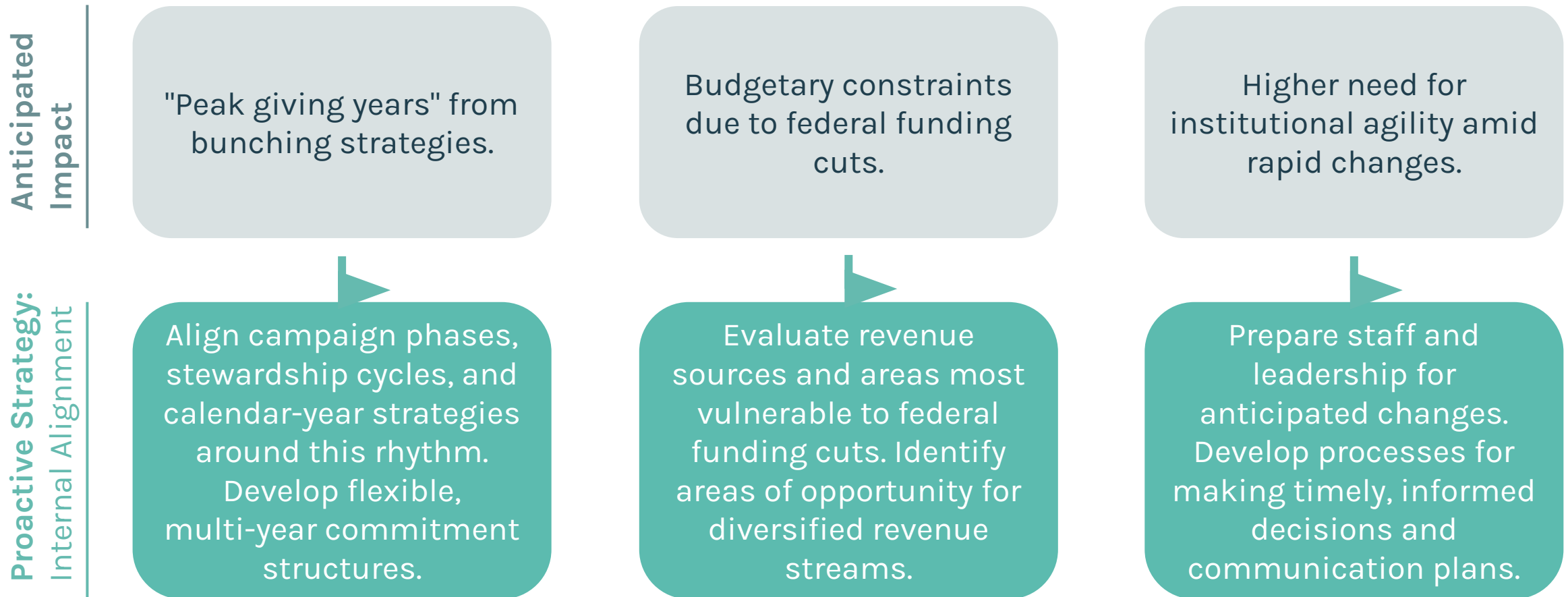
How can organizations take proactive steps to build resiliency?

External strategies based on anticipated future impacts



How can organizations take proactive steps to build resiliency?

Internal strategies based on anticipated future impacts



Audience Q&A

Key Takeaways

Key takeaways for leading through uncertainty

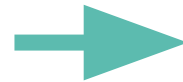
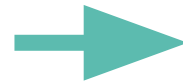
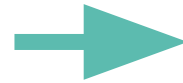
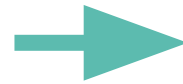
Because...

Leadership transitions and funding volatility are accelerating

Nonprofits must adapt to funding volatility, political polarization, and public scrutiny

Clarity and transparency build trust in uncertain times

Resilience requires proactive leadership, not reactive management



Leaders Can...

Invest in succession planning, develop mid-level leaders, and ensure board stability

Scenario-plan, diversify revenue, and align strategy with mission while adjusting tactics in real time

Communicate priorities consistently, invite feedback, and create alignment across staff and board, and where appropriate, the community

Anticipate future shifts, test new strategies, and strengthen organizational adaptability today



Thank you.

We are here to be your thought partners.

Claire Seifert

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Check out our **2025 Philanthropic Landscape Report** to explore essential tools to navigate today's evolving philanthropic environment

