



Charting Your Course with the Three Cs

*Navigating Philanthropy's
Evolving Landscape*

Jeff Sodowsky. MBA, MA, CFRE
Vice President Pacific & Senior Consultant



The Journey Ahead (Agenda)

Where We're Headed:



Understanding the Landscape



Introducing the Three Cs



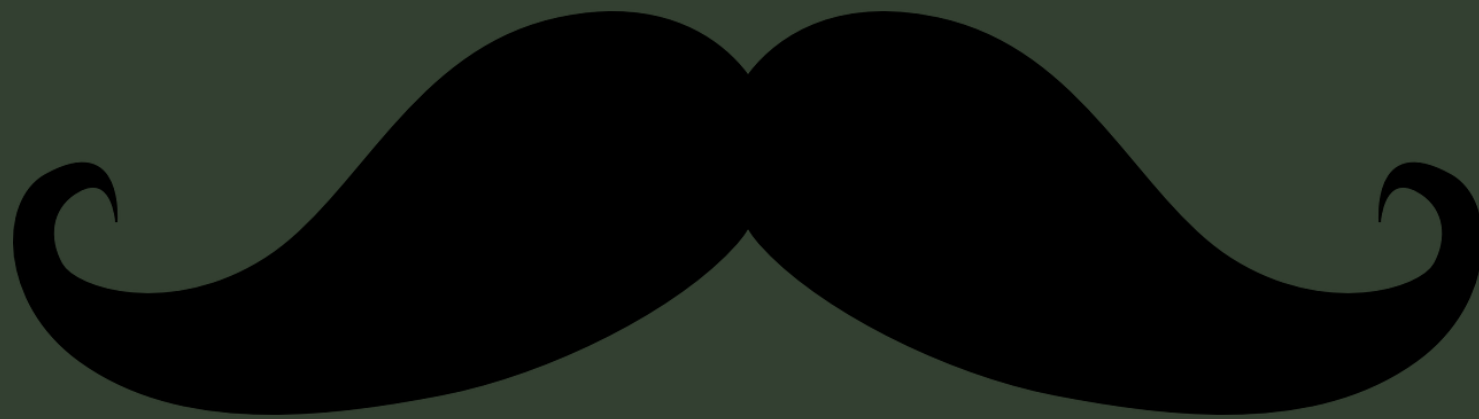
Applying the Compass to Your Work



Realigning for the Road Ahead



Who's the guide?

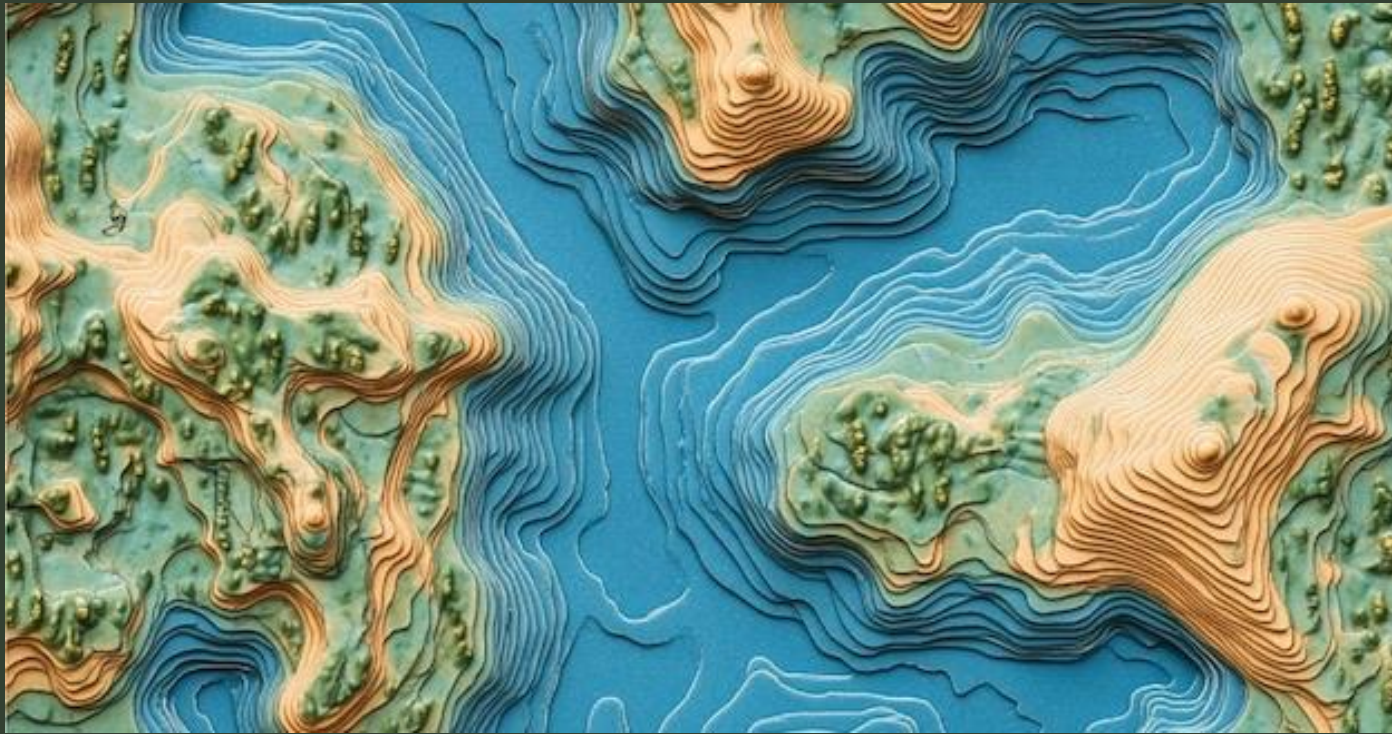




Do you have a
destination in mind?



The Evolving Landscape of Philanthropy



- Key trends shaping today's philanthropic environment
- Why organizations feel "lost" even with an identified destination in hand

CHAOS



- POLITICAL
- ECONOMIC
- SOCIAL
- TECHNOLOGICAL
- ENVIRONMENTAL
- LEGAL

The Treasure Map Metaphor

- Does your organization have a map to?
- Knowing where the “X” is vs. having the tools to reach it



Introducing the Three Cs



- The Three Cs: Your Compass for Navigating Complexity
- Brief preview: Culture, Competency (*Clarity*), and Capacity

Case Examples / Applications

- Brief real-world experiences
- How these lenses transformed direction





CULTURE

Organizational practices as the guiding principle

Ensuring values and behaviors align with fundraising success



CULTURE

Is fundraising seen as a shared responsibility or siloed within a department or committee?

Do board members understand and embrace their roles in the fundraising process?

Are donors treated as transactional sources of funding, or as partners in impact?

Are you a “safe place” – approachable and reliable?

Does curiosity prevail?



COMPETENCY/CLARITY

Is there solid footing to take the best (or desired) step forward?

Is expertise amassed and distributed?

Who scouts, who navigates, and who sets up camp?

How are alerts and findings shared or flagged?

What knowledge must be gained?



COMPETENCY/CLARITY

Are staff and board trained in current best practices?

Do they understand the nuances of donor engagement, gift structuring, and long-term stewardship?

Is there clarity on roles and responsibilities across the solicitation cycle?

Is there expertise for practices that may be outside of the norms of regular organizational fundraising operations?



CAPACITY

Are there adequate resources (staff, systems, support)?

Identify gaps

Prepare the right tools and bridges

CAPACITY



Are roles clearly defined to avoid duplication or burnout?

Are volunteer participants meaningfully engaged and leveraged as extensions of the professional team?

Is there smart use of technology and systems to streamline operations and enhance engagement?

Are the resources available used with understanding, focus and discipline?

Are parties ready for what resides on the other side of success and its impact on scale or demand?

Are succession plans in place?



APPLYING THE COMPASS

Inform assessments

Define needed steps

Provide illustrations



Your Next Step



Questions to ask others on the excursion



Tools you might need for your journey



Consider a diagnostic or cohesion-building session

Thank You / Let's Connect

Jeff Sadowsky MBA, MA, CFRE

- j.s@globalphilanthropic.ca
- LINKEDIN

