THE POWER OF BEING UNDERSTOOD

AUDIT | TAX | CONSULTING
STRATEGIES FOR A SUCCESSFUL FUNDRAISING CAMPAIGN

Part 1 – Preparing for a Campaign

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Today’s presenters

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Agenda

• Assessing the climate
• Campaign preparation checklist
  – 24 to 12 months out: Strategic planning
  – 12 to 6 months out: Campaign readiness
  – 6 months out to launch: Feasibility study
• Q&A / Discussion
Learning objectives

• **Become familiar with the many factors which can impact nonprofit organization capital campaign success**

• **Review the many ways in which an organization needs to prepare for a capital campaign**

• **Learn what a capital campaign feasibility study will accomplish (and what it won’t)**
ASSESSING THE CLIMATE
Assessing the climate

- Organizational philanthropic history
- Recovering donor confidence
- Growing donor savvy
- Accountability/regulation/reporting
- Inter-generational transfer of wealth
- Economic uncertainty
CAMPAIGN PREPARATION CHECKLIST
Campaign preparation checklist

• **24 – 12 months out: Strategic planning**
  - Market survey
    - Constituency-wide
    - Internal focus groups
  - White paper
  - Board retreat
  - Final strategic plan
  - Related business plan
  - Credentialing and endorsements
Campaign preparation checklist

• 12 to 6 months out: Campaign readiness
  – Development assessment
    • Internal readiness
    • Prospect research and tracking systems
  – Board education and development
  – Annual fund momentum
  – Top prospect identification and personal cultivation
  – Planned giving
  – Public relations/marketing/communications
Campaign preparation checklist

• 6 months out to launch: Feasibility study
  – Methodology
    • “Test” case for support
      – Institutional mission and profile
      – Strategic goals
      – Campaign initiatives
      – Annual giving
      – Range of gifts chart
      – Donor recognition
Campaign preparation checklist

• 6 months out to launch: Feasibility study
  – Methodology
    • Interview pool
      – Ability to give
      – Ability to lead
      – Connectedness
      – Loyalty
    • Tailored questionnaire
• 6 months out to launch: Feasibility study
  – Findings
    • Overall perceptions of organization
    • Prioritization of the organization
    • Case for support feedback
    • Identification of potential campaign leaders
    • Identification of potential campaign lead donors
    • Prospect interest in leading/helping
    • Potential ranges of support
    • Other campaign design factors
Campaign preparation checklist

• **6 months out to launch: Feasibility study**
  - Recommendations
    • “Go/no go” decision
    • Case for support revisions
    • Timing/sequence/stages
    • Leadership (volunteer/staff/counsel if value-added)
    • Goal potential
Campaign preparation checklist

• 6 months out to launch: Feasibility study
  – Campaign operating plan
    • Overarching campaign strategy rationale
    • Organizational chart
    • Roles and responsibilities (Volunteer/staff/counsel)
    • Quarterly timeline / monthly task summary
    • Revenue / expense budget
### Sample capital campaign timeline: FYI

#### Model Capital Campaign Operating Plan Summary

<table>
<thead>
<tr>
<th>CAMPAIGN FEASIBILITY STUDY</th>
<th>CAMPAIGN OPERATING PLAN</th>
<th>LEADERSHIP RECRUITMENT</th>
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<tbody>
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<td>- Co-Chairs, Honorary Co-Chairs, Campaign Leadership Gifts Committee, Constituency Leaders</td>
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#### BOARD CAMPAIGN

- Current and Former Board Members

#### TOP PROSPECT CULTIVATION/SOLICITATION

- Identification, Research, Solicitation of Top 25 ‘Ready’ Prospects
- Identification, Research, Qualification and Cultivation, Leading to Solicitation, of ‘Next’ 50 Prospects

#### PR/MARKETING/COMMUNICATIONS

- Integration of Campaign Messages Into Existing Communication Initiatives and Development of Campaign Events, Publications and Publicity

#### CORPORATE CAMPAIGN

- Identification, Research, Qualification, Cultivation, Solicitation

#### FOUNDATIONS

- Identification, Research, Qualification, Cultivation, Solicitation

#### GOVERNMENTS (Local/State/Federal)

- Advocacy/Cultivation, Solicitation

#### CAMPAIGN LOGISTICS

- Solicitation Materials, Prospect Tracking Reports

#### GENERAL CAMPAIGN

- Development and Execution of Targeted Campaign Initiatives for each Constituency
QUESTIONS AND ANSWERS?
Before we conclude

Make plans to join us for parts 2 and 3 of this webcast series:

• **Part 2 – Understanding the accounting, risk and technology components of a campaign**
  - Tuesday, April 19, 2016
  - Noon EDT | 11 a.m. CDT
  - 90 minutes
  - Up to 1.5 CPE credits

• **Part 3 – Obtaining the green light and maintaining momentum**
  - Wednesday, May 18, 2016
  - Noon EDT | 11 a.m. CDT
  - 60 minutes
  - Up to one CPE credit
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