THE POWER OF BEING UNDERSTOOD

AUDIT | TAX | CONSULTING
STRATEGIES FOR A SUCCESSFUL FUNDRAISING CAMPAIGN

Part 3 – Obtaining the green light and maintaining momentum

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Your instructors

**Bob Billig**
National Nonprofit Practice Leader
RSM US LLP
Washington, DC
bob.billig@rsmus.com

**Susan Davis**
Partner
RSM US LLP
Des Moines, IA
susanl.davis@rsmus.com

**Kathleen Hechinger**
Deputy Director and CFO
The Joffrey Ballet
Chicago, IL
khechinger@joffrey.org

**David Coyne**
President
The Sheridan Group
Arlington, VA
dcoyne@sheridangp.com
Recap of part 2

• Building blocks to a successful campaign
  – Purpose
  – Goals
  – Strategies

• Technology
  – Systems
  – Social media
  – Third Platform

• Enterprise Risk Management
  – Root causes
  – Potential impacts
  – Personally identifiable information (PII)
  – Cyber risks
Learning objectives

• Learn about and anticipate the internal and external factors which can impact campaign strategy, as well as the personal issues which can affect donor pledge fulfillment

• Review techniques for keeping donors and volunteers engaged, excited and motivated throughout the effort.

• Review what to do (and what NOT to do) as the campaign concludes and the institution reaches a ‘new ‘normal.’
Presenting your business plan

• Campaign operating plan components
  - Overarching strategy/sequence
  - Organizational chart
  - Detailed roles & responsibilities (volunteers, staff (incl. new), counsel)
  - Quarterly timeline
  - Monthly task summary
  - Revenue/expense budget

• Financial projections
  - Pledged commitment attainment
  - Cash Flow/Fulfillment
Handling the unexpected

• External factors
  - Economy
  - Terrorism
  - Natural disaster/epidemic
  - Political election cycles
  - Other

• Internal factors
  - Transformational gift
  - Institutional scandal
  - President / VP/Advancement departure
  - Other
Handling the unexpected

• Donor factors
  − Job changes
  − Divorces
  − Kids entering college
  − Death (If you have a signed pledge, you must notify family immediately)
Maintaining momentum during and after a campaign

• Initiating / ongoing institutional planning
  – Capital priorities
  – Volunteer identification
  – Prospect identification
  – Preliminary budgets / rationales
Maintaining momentum during and after a campaign

• Stewardship
  – Donors
    • Letters
    • Communications
    • Events
    • Profiles
    • Naming opportunities
    • Informative, personal pledge reminders
  – Volunteers
    • Meetings
    • Communications
    • Profiles
  – Major Events
    • Kick-Off
    • Milestone achievements
    • Victory celebration
Maintaining momentum during and after a campaign

- Board development
  - Culture change
  - Retirement
  - Recruitment

- Public relations
  - Short attention span
  - Content calendar
    - Share the good news at least 12-18 mos. beyond end of campaign
Maintaining momentum during and after a campaign

• Importance of transparency
  – Campaign accounting
    • Report Format
    • Board ‘Ownership’
  – Use of reporting dashboards
    • Pledges
    • Cash Raised
    • Construction Budget/Timeline
  – Formal final campaign recap report
What to do coming out of the campaign

• Stay in “campaign” mode
  - Staffing
  - Personal visits
  - Volunteer/board engagement
  - (Increase) communication
  - (Don’t forget about pledge reminders…)
What to do coming out of the campaign

• Development program momentum
  - Commitment to the major gifts function
  - Renewed focus on annual fund
  - Transition to Campaign preparation
  - Case for support development
  - Retirement / transition of campaign leadership
What to do coming out of the campaign

Your campaign has taken you to a new normal...

...Stay there!

The cost of ramping down is lost time, lost momentum and lower expectations
THANK YOU FOR YOUR TIME AND ATTENTION