



How to Get Ready for a Major Campaign

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November 17, 2011

What We'll Cover Today

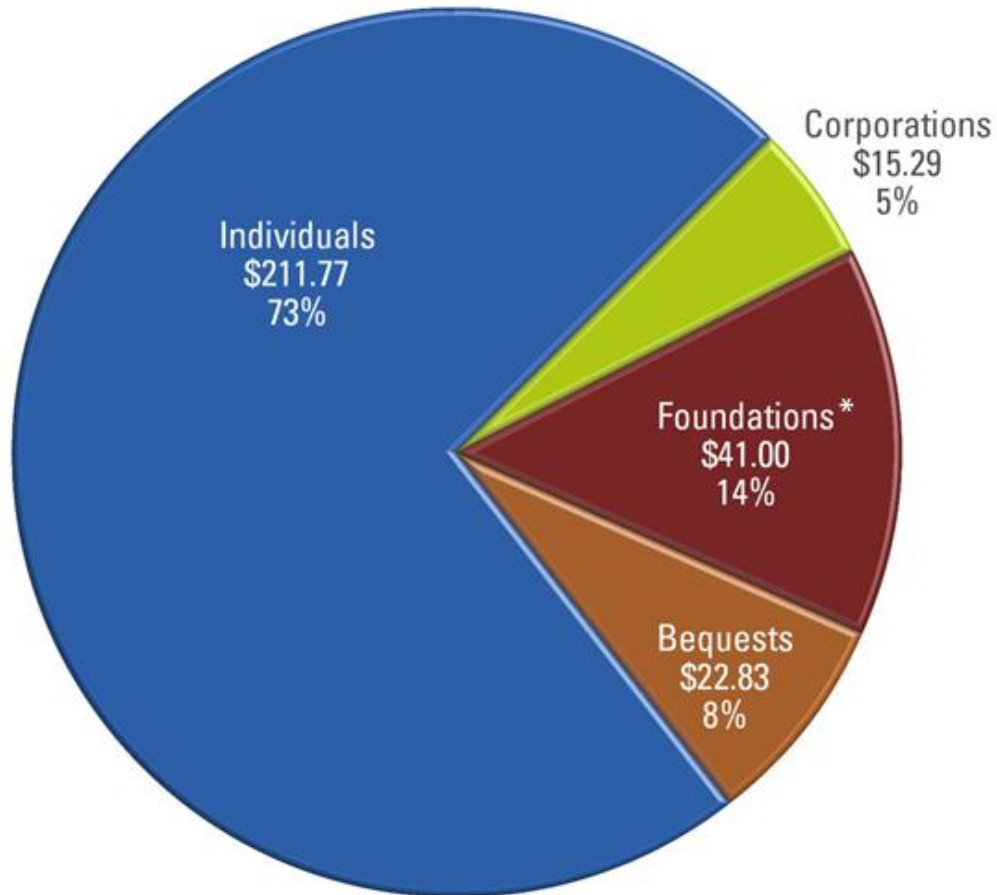
- A bit about the fundraising environment
- Why organizations launch campaigns
- How to prepare for success

About Me...

- Twenty years in the fundraising field
 - Franciscan Health System
 - Charles Wright Academy
 - Pacific Lutheran University
- Led or was involved in five capital campaigns
 - Over \$250M raised
- Began career as a newspaper reporter

2010 Charitable Giving

Total = \$290.89 billion

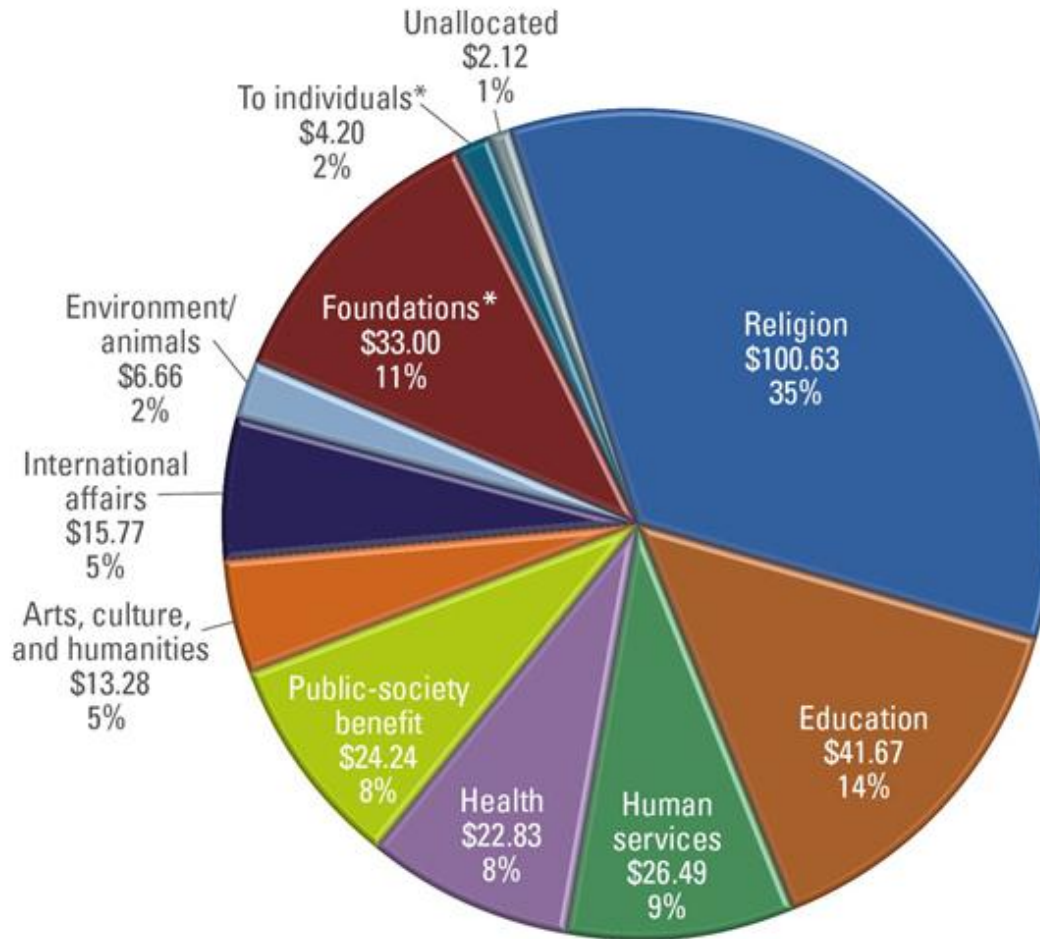


Includes rounding to get to 100%

*Estimate developed jointly by the Foundation Center and Giving USA

Recipients of Contributions

2010 Total = \$290.89 billion



Includes rounding to get to 100%

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Setting the Stage

“Donors do not give to organizations because organizations *have* needs; they give because organizations *meet* needs.”

-Kay Sprinkel Grace
“Beyond Fundraising”

Setting the Stage

**“People give money to solve problems.
And the problem is NEVER that your organization
needs more money.”**

Granstmanship training
(Jan. 1992)

People Don't Give to Buildings



A Working Definition

Capital Campaigns

=

Capitalization of community values

through your program

Definitions

A comprehensive campaign
is a special fundraising effort
in which all gifts and pledges
are counted toward a total philanthropic goal
over a set period of time

What Campaigns Accomplish

- Make the community a better place
- Program is transformed
- Volunteers and staff move forward
- Philanthropic culture enhanced
- Annual giving grows
- Past supporters reconnect
- PRIDE AND LEGACY

Let's Get Started

“Do what you can

Use what you have

Start where you are.”

-- Theodore Roosevelt



Campaigns: Do You Really Need to Do it?



Leap of Faith



Why Campaigns Succeed

- *Clear plans that meet urgent needs with specific outcomes*
- *Identifiable donor prospects from the inside out*
- *Leadership and buy-in from the top down*
- *Experienced, supported fundraising staff*

Is it Feasible?

The Feasibility Study

- Sharpens your case
- Tests your case where it counts – the marketplace
- Helps to refine dollar goal and/or campaign components
- Gathers important feedback
- Reduces greatly the chance of failure

The Feasibility Study

Feasibility Studies require Outside Counsel

- Priority
- Objectivity – the donor’s voice
- Methodology
- “No person is a prophet in his/her own land”
- The question is *which* counsel not *whether* counsel

More on Feasibility

Feasibility Study's Biggest Benefits

- Begins the case development process
- Identify major sources of support
- Build confidence
- Reduce fear (terror?)
- Board-cred
- Donor-cred

What You Might Find...

- Community doesn't embrace *vision*
- Limited *due diligence*
- Lack of volunteer or professional *leadership*
- Too *few donor prospects* willing to stretch
- *Goal* not supported by research
- Poor campaign *plan*

The Role of the Board as a Whole

- Steward ethically
- Manage resources
- Control quality
- Provide fiscal oversight

The Role of the Board as Individuals

- Invest personally
- Share the story, passionately
- Open doors
- Participate
- Guide fellow donors

The Board's Bottom Line



The Role of the Executive

- Set the course
- Allocate resources
- Inspire and support staff and volunteers
- Go down in history for leadership that realized vision

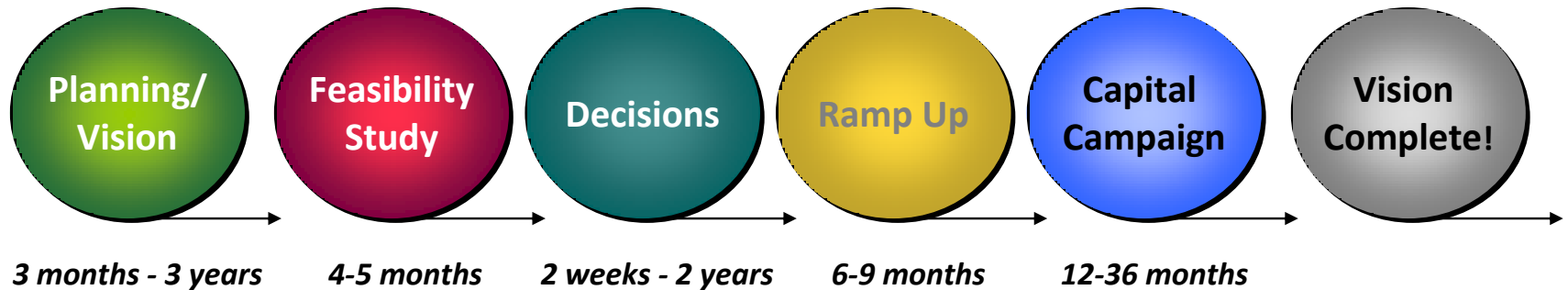
The Role of Development Staff

- Manage the day-to-day implementation
 - Support volunteers making asks
 - Making asks themselves
 - Set targets and ensure movement toward them
- Motivate and prepare volunteer and executive leadership
- Partner with campaign counsel
 - Listen and USE their wisdom
 - Lean on them for support/insight during the hard times

**The best way to ensure success
is to**

PLAN!

Lifecycle of a Campaign



Outcomes:

- Vision/Mission
- Plans:
Strategic Business Program Development
- Project definition

Outcomes:

- Feasible goal
- Key messages/positioning
- Leadership prospects
- Support and strategies
- Req. for staffing and systems
- Campaign plan and timeline
- Potential roadblocks and solutions

Outcomes:

- Finalize project plans
- Recruit initial volunteer leadership
- Strengthen internal readiness
- Adjust timeline
- Secure early gifts
- Board resolution

Put Into Place:

- Project definition
- Strong case for giving
- Leadership
- Campaign plan
- Donors
- Timeline
- Staffing and systems
- Communications plan
- Board gifts to launch campaign
- Stewardship plan

Active

Fundraising:

- Tiered fundraising:
Lead gifts Major gifts Community gifts
- Multiple strategies:
Personal solicitations Grant writing Special events

Outcomes:

- Celebration!
- Facility open
- Endowment Initiated
- New and/or expanded services
- Organization at next level
- Mission enhanced

Planning/Vision: three months - three years

Solid planning can save two+ years on your campaign

Outcomes:

- Vision/mission
- Plans: Strategic, Business, Program, Development
- Project definition about 80 percent complete

Feasibility Study: four to five months

- Feasible goal
- Sources of support
- Key messages/positioning
- Leadership prospects
- Internal readiness
- Campaign plan and timeline – or other next steps

Decisions: two weeks - two years

- Finalize project plans and budget
- Adjust timeline
- Recruit additional volunteer leadership
- Strengthen internal readiness
- Secure early gifts
- Board resolution to move forward

You're Going Forward: six - nine months



Active Fundraising: 12-36 months

- Tiered fundraising from key constituencies
 - *Lead gifts*
 - Major gifts
 - Community gifts
- Multiple strategies
 - Personal solicitations
 - Grant writing
 - Special events
 - Social media

Vision Complete!



Your Turn: Q & A



Thank You!

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