



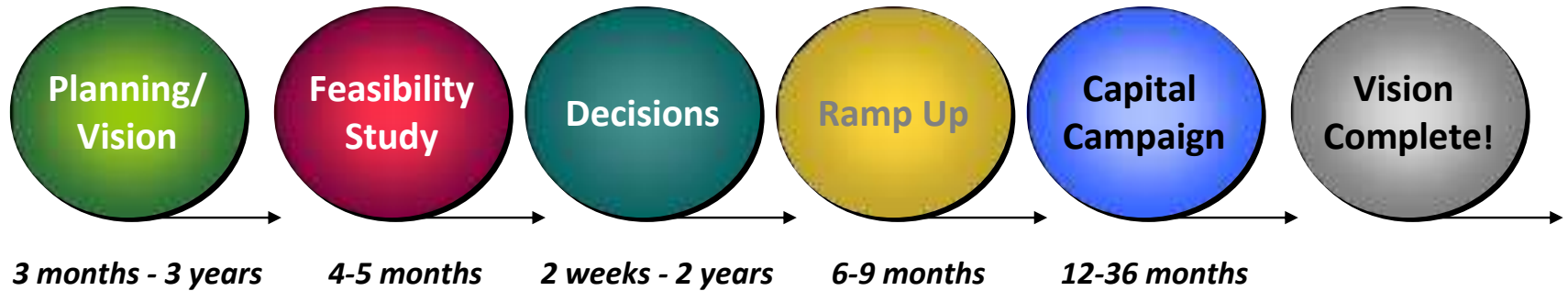
Strategies for a Successful Campaign

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The Collins Group
December 1, 2011

About Me...

- 35 years in and advising nonprofits
 - Consultant since 1999
 - 11 years as CEO
- TCG: Firm's clients have raised over \$1B since Jan 2000
- Nonprofits I have provided counsel to
 - 60 organizations, diverse sectors
 - Start-up development programs – well established
 - Fundraising goals from \$2 - \$200M
- Began career as a community organizer....

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

This Is Your Workshop: How Should We Focus Our Time?



What We Can Cover Today

- A campaign—how it's different and types
- Project definition, business plan, various revenue sources, budgets, and decision making
- Campaign case for support
- Fundraising goal, gift chart, and strategies
- Prospect ID, cultivation and solicitation
- Volunteers—engaging them, organizational structures
- GAP, gift counting guidelines, donor recognition
- Campaign brand, slogan, collateral
- Building and maintaining momentum -- timeline
- Mass market (aka community) campaigns
- Events and celebrations

Campaigns can raise funds for...

- Capital projects
- Endowment
- New initiatives
- Start-up funds
- Capacity building
- Debt retirement
- Operational support
- Fundraising costs

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



Revenue Sources

- Philanthropy
- Tuition and program fees
- Grants and service contracts—government, foundation, United Way
- Traditional bank financing
- NMTC
- Affinity financing
- Development rights, historic tax credits
- Housing tax credits

CAMPAIGN “CASE STUDY” EXAMPLE #1

Building a Healthier Anchorage



Capital Campaign Plans

October 6, 2011

Campaign Goals

- Complete the health center without debt
 - The Campaign will finish construction costs, facility outfitting, costs for new and expanded programs, soft costs for moving in and ramping up operations
- Improve ANHC's financial stability and sustainability
- Double amount of access to health and dental care that ANHC provides

Campaign Goals

- Attract new volunteers and donors = increase fundraising capacity for the future
- Increase visibility = marketing for new patients
- Help build morale throughout ANHC

How We Will Raise \$2.25M

- Early Gifts Pledged or Completed:
 - Providence Health & Services Alaska - \$250K
 - Rasmuson Foundation - \$500K community challenge grant (final dollars in)
 - ANHC Board and Senior Staff Gifts - \$100K
- Remaining goal: ~\$1.3M
- Individuals, businesses/corporations, and foundations, community orgs
- Multi-year pledges (up to 3 years)

Project and Campaign Timeline



Campaign Timeline for Anchorage Neighborhood Health Center

	<i>Advancement Phase 2008 - March 2011</i>	<i>Leadership and Major Gifts Phase April 2011 - March 2012</i>		<i>Community Phase April 2012 - September 2012</i>
<i>Focus</i>	Advancement Planning	Board Gifts: All Levels Lead Gifts: \$100K+ Major Gifts: \$5,000+		Grassroots Gifts: <\$5,000K
<i>Board of Directors</i>	Active participation in Advancement Activities to Provide Foundation for Success	Board Gifts		New Member Board Gifts
		Campaign Orientation and Training	Provide Leadership for Campaign; Monitor Progress	
<i>Campaign Leadership: Steering Committee & Honorary Cabinet</i>	Campaign Feasibility Study	Recruit and Orient Campaign Leaders	Active Campaign Steering Committee: Monthly Meetings, Donor Cultivation & Solicitation	Volunteer Recognition
	Identify and Brief Prospective Leaders	Secure Gifts from Campaign Leaders		
<i>Fundraising</i>	Secure Lead Gifts from Providence and Apply to Rasmuson Foundation		Identify, Cultivate, and Solicit Major Donors: House Parties, Hard Hat Tours	
		Secure Rasmuson Foundation Grant		Community Campaign: Awareness -Building
<i>Preliminary Fundraising Goal/Benchmark</i>	\$750K Pledged	50% Funds Pledged	85% -90% Funds Pledged	\$2.25M Raised
<i>Health Center Project Planning & Construction</i>	Site Secured, Design Development Phase of Architectural Work Completed, Pro Formas & Strategic Financial Plan Finalized	Construction Documents, Permitting & Prep for Groundbreaking	Active Construction	Grand Opening!

Donor Constituencies & Goals

- \$350K - Individuals, ANHC board, staff, and volunteers
((\$150K raised to date. Requests to go to volunteers & community donors.)
- \$850K - Foundations
((\$500K raised to date. More than \$350K currently out in requests.)
- \$500K - Medical & dental businesses and providers
((\$273K raised to date. Requests to go to ARH, Dental Society, and providers.)
- \$350K - Other businesses & corporations
((\$100 raised to date. Requests to go to financial institutions, petroleum, others.)
- \$200K - Organizations and events
((\$9K raised to date. Requests to go to Duct Tape Ball, Ride for Life, and others.)
- \$2.25M *CAMPAIGN COMPLETE!*

CAMPAIGN “CASE STUDY” EXAMPLE #1



wellspring
family services

Lasting Solutions for Homeless Families

- Five-year effort
- Recession impact hit in final year
- 1280 donors, 60% new
- Campaign designed to build a sustainable major donor program
- Transformational



Campaign Branding



Awareness Campaign



Name Change



Transformation #3: *Miracles and Major Gifts*



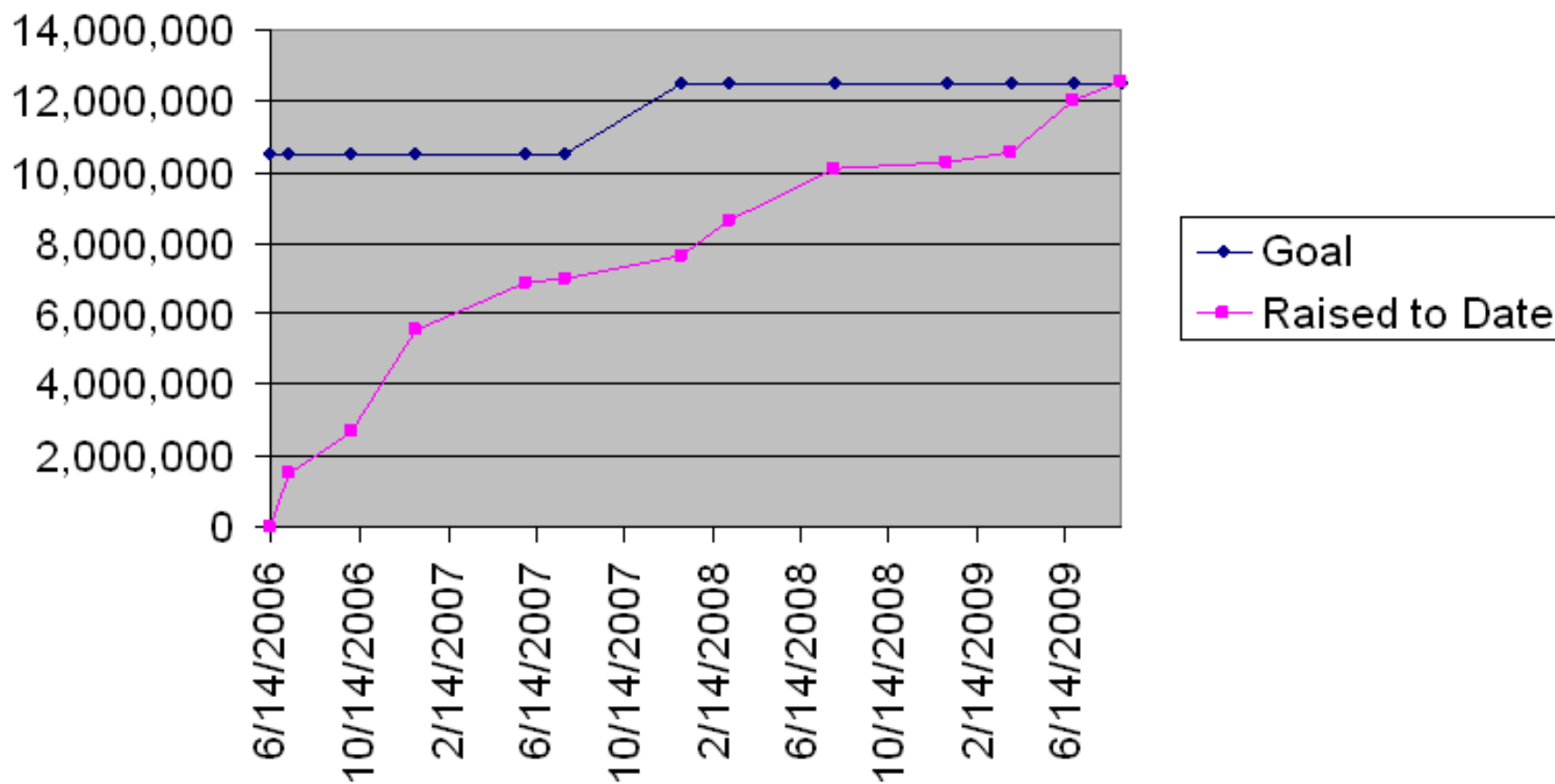
Campaign \$ Goal: *How It Grew*

2005	Feasibility Study Recommendation	\$ 6.5M+
2006	<i>Selected as Rotary Centennial Project</i>	
2006	Board Decision to Move Forward	\$10.5M
2007	Proposal for Kresge Challenge	\$12.5M
2009	Final Result	\$14.5M



Climbing the Mountain

Campaign History



Leveraging Miracles

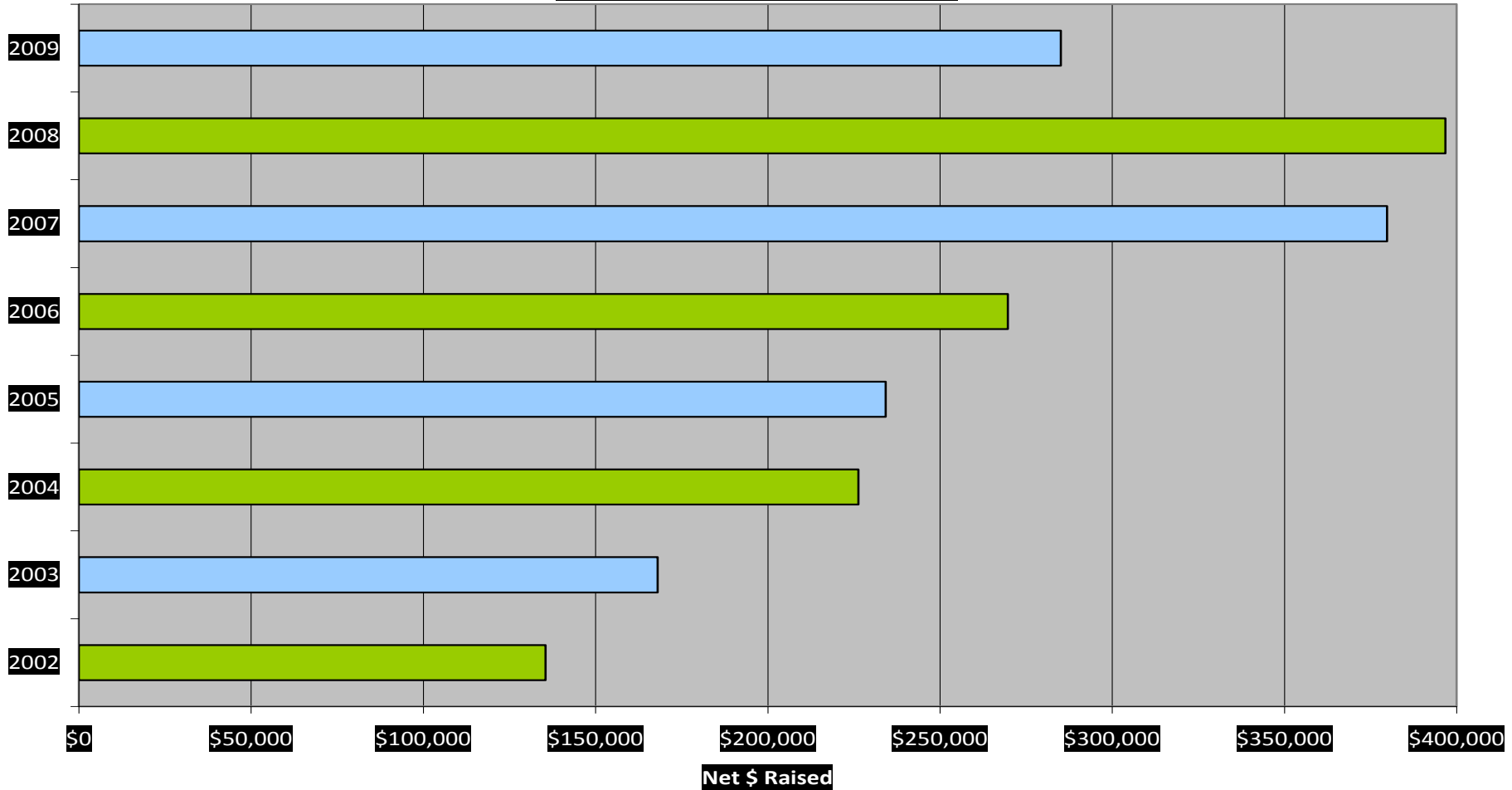
- Selected by Rotary for Centennial Project
- Rotarian Champions
- Maximum gifts from foundations / corps
- Kresge Challenge
- \$1M from individual donor
- Close the gap effort – *“my gift will make a difference”*
- State Building Communities \$

Rotary Centennial Gifts		648	\$4,025,000	648	\$4,184,400
Leadership Gifts	\$500,000	4	\$2,500,000	4	\$3,450,000
	\$100,000				
	+	16	\$1,500,000	8	\$1,250,000
Major Gifts	\$50,000	16	\$800,000	12	\$654,280
	\$25,000	26	\$650,000	11	\$288,023
	\$10,000	75	\$775,000	43	\$492,660
Community Gifts	\$5,000	100	\$600,000	23	\$137,000
	<\$5,000	550	\$250,000	281	\$105,095
Government Grants			\$1,400,000	2	\$3,720,000
Total		1435	\$12,500,000	1032	\$14,281,458

* ~\$250K is not accounted for

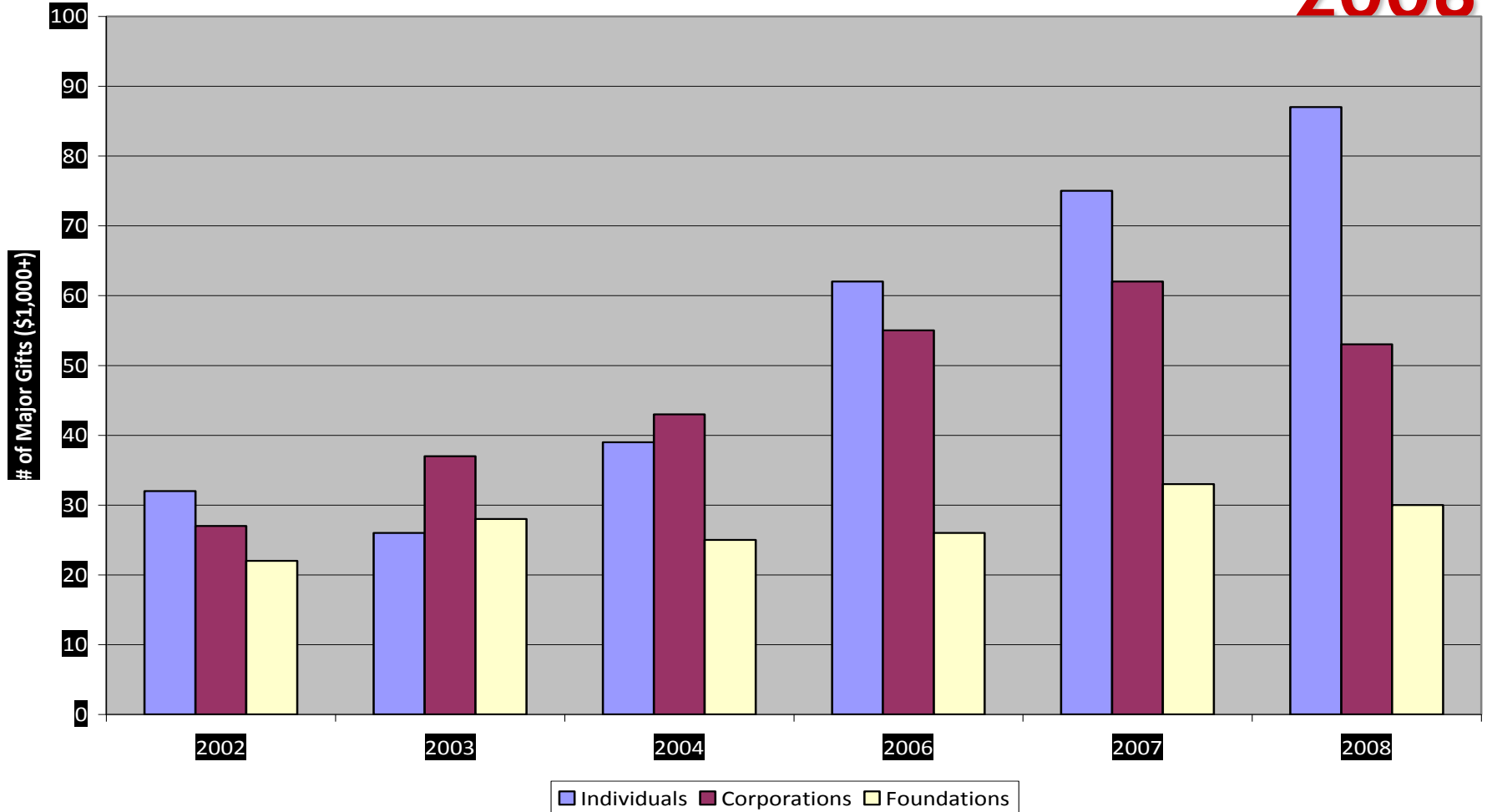
Spring Luncheon: Net \$ Raised for Annual Support

Spring Luncheon: Net \$ Raised

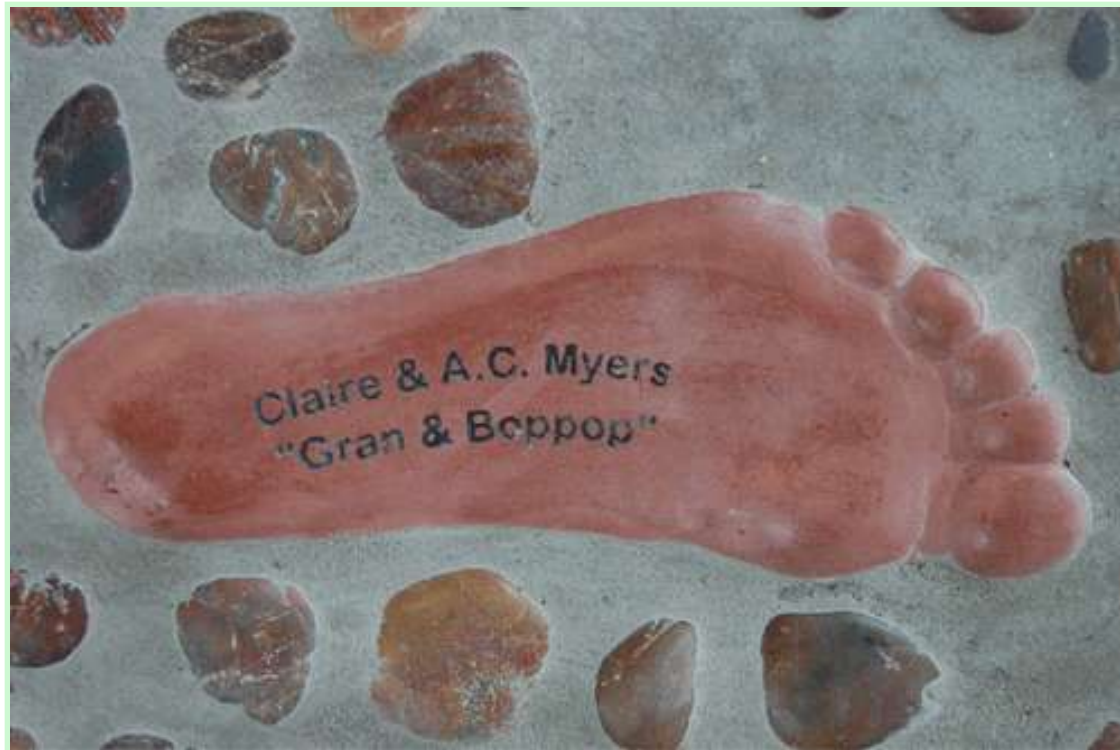


Annual Major Gift Growth by Constituency 2002- 2008

of Major Gifts by Constituency & Year



Transformation #4: *Community Gifts*



Path to Lasting Solutions



Donor Recognition



Events and Celebrations!



Campaign Event: Celebrations, Friend-raisers, Intimate...



...or for everyone





Campaign Lifecycle- Overview of Each Phase

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

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



Thank You!

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