



PRESENTATION TO **NCAIS: Campaign 101**

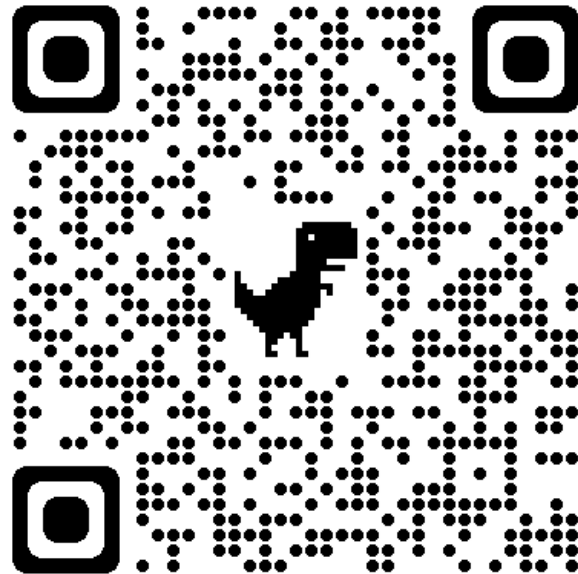
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NCAIS

North Carolina Association of Independent Schools

Download today's slides:





About Us

Our Principles

Enlist

We identify and connect leadership.

Empower

We partner to build sustainability.

Embolden

We encourage talent and leadership.

Embrace

We transform lives through relational philanthropy.

Since 1984, CapDev has been making nonprofits better through inclusive philanthropy consulting and search services.

Our Mission

CapDev partners with nonprofit communities to enlist, empower, and embolden its leaders to embrace the transformational power of inclusive philanthropy.



About Forsyth Country Day School



- Founded in 1970. *We are a community of learners dedicated to preparing our students for what's ahead.*
- FCDS is in the midst of eight consecutive years of enrollment growth with a total enrollment of more than 940 students. There is currently a waiting list for most grades from preschool-12
- FCDS has an average class size of only 14 students in K-12.
- FCDS offers 21 AP courses and 19 honors-level courses.
- Current Head of School Gardner Barrier '97 is in his eighth year of leading the school.
- FCDS is a leader among independent schools in respect to courses offered in STEM, entrepreneurship, arts, and architecture.
- FCDS set a record for total giving and total donors during 2022-2023 and received the largest gift in school history, \$2 million from Robert and Melanie Niblock.
- The classes of 2022 and 2023 were awarded \$11,688,105 in scholarships with 100 percent college acceptance.



What do you want out of this time?



ABC Organization



Agenda

Types of Campaigns

Giving Trends

Start with Why

Donors

Leadership

Capacity

Takeaways



Types of Campaigns



Capital: making a capital investment; often building/reno.



Endowment: to build up reserves or endowment funds



Major Gifts: targeted initiative for special projects



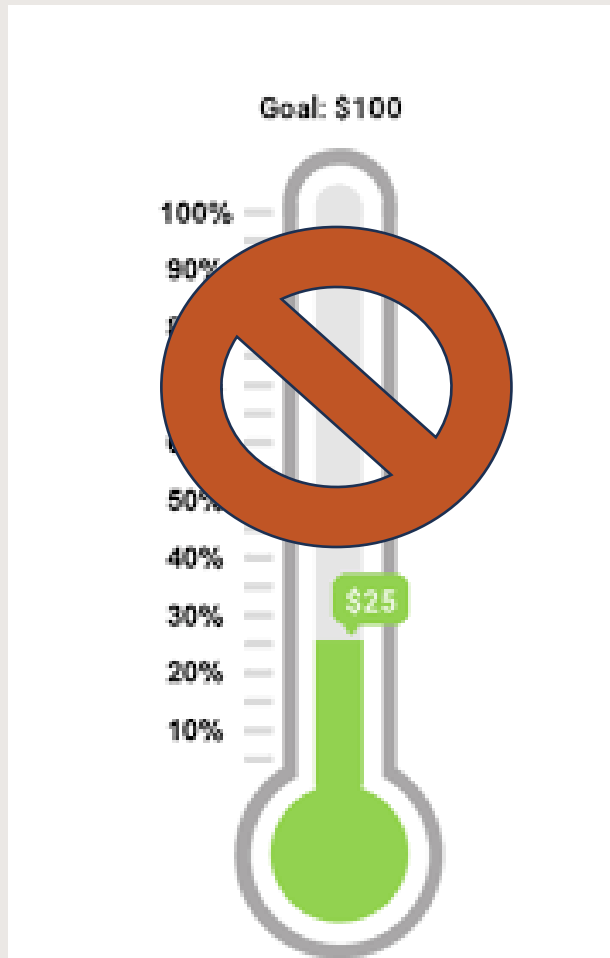
Annual: ongoing operational funds



Comprehensive: combination “the kitchen sink”



Purpose of Campaigns



Why undertake a campaign?

1. To successfully raise funds to meet or exceed a goal.
2. To significantly increase:
 - Recognition and value of the organization
 - Number and gift levels of donors
 - Fundraising capacity and abilities of the organization
 - Quantity, quality and commitment of volunteer leadership
 - Long-term financial stability



Building a Culture of Philanthropy

Before: *Transactional*

- FR is crisis driven/reactive
- FR is a cost; not an investment
- FR is done only by few
- Special events and direct mail are emphasized
- Donors are at arms-length
- If major gifts occur, they're usually unsolicited

After: *Relational*

- All understand the need to raise money
- Everyone is an ambassador
- Donor-centric; not me-centric
- Visitors are welcomed
- E.D. sees him/herself as face of the agency and is 100% committed to fundraising
- All make a gift

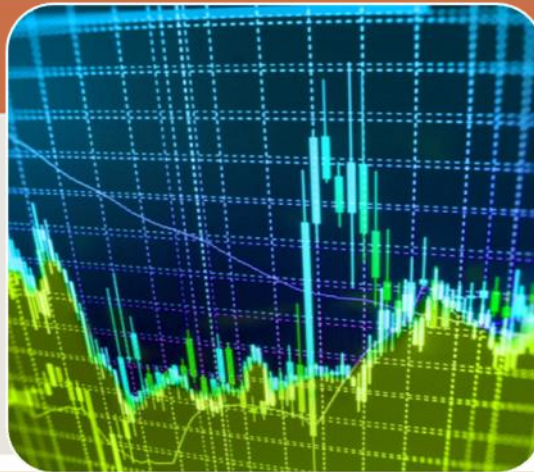


Getting Started

Strategic Planning



Financial Planning



Consensus Building



Critical Element



Sample Campaign Timeline



Communications Throughout!



Are You Ready?

Organizational Structure

- 501c3 tax-exempt status
- State charitable solicitation license
- Approved plan of action with defined objectives
- Operational budget with financial capability for fundraising objectives
- Community awareness

Vision

- Clear Vision and Mission Statement
- Current Strategic Plan
- Elements to develop a Case for Support
- Leadership awareness of purpose/need for campaign

Leadership

- Strong Board of Directors' support
- Community leadership represented on board
- Executive staff buy-in
- Consideration of potential campaign leaders

Donors

- Database of past and current donor records
- Active use of board relationships
- Prospective major donors identified (and possibly cultivated)

Infrastructure

- Office and staff capacity to support fundraising effort
- Compelling communication tools
- Efficient database software



Campaign Readiness Rating

Use this checklist as a scorecard and guide to help determine what your organization needs to be ready to plan and prepare for a major campaign:

✓	Action to be Accomplished	Rating*
	ORGANIZATIONAL STRUCTURE:	
	501c3 tax exempt status	
	State charitable solicitation license or exemption up-to-date	
	Operational budget with financial capability for campaign's objectives (prepared proforma budget for campaign project if applicable)	
	Community awareness	
	VISION:	
	Clear mission and vision statements	
	Current strategic plan	
	Campaign objectives to develop a case for support with compelling appeal	
	Leadership awareness and support of purpose/need for campaign	
	Proposed campaign meets a valid need	
	LEADERSHIP:	
	Strong board commitment (attendance) and support of proposed initiative	
	Community leadership represented on board	
	Board is 100% giving, and has capacity for major gifts in campaign	
	Executive staff buy-in	
	Consideration of and connection to potential campaign leader(s)	
	DONORS:	
	Database of past and current donor records	
	Active leveraging of board relationships	
	Prospective major donors identified	
	Cultivated donors who are ready and able to make major gifts	
	*If FS: list of 30-50 top supporters who could be interviewed in a study	
	Reliable annual campaign success (with a challenging goal)	
	CAPACITY:	
	Staff/office capacity to support campaign effort – CEO and development staff	
	Operating with a balanced budget	
	Maintain operational reserves, endowment or foundation	
	Compelling communications tools	
	Efficient database software to manage donor information	
	Awareness of any potential competing campaigns	

*Rate each item on a 1-10 scale, according to how ready you feel the organization is in that area.



Essential Tools to Build a Campaign



building a
**Philanthropy
TOOLKIT**

- Case for Support
- Leadership
- Donors
- Capacity



Case for Support



Building a Case for Support

Emotionally
Stimulating

Intellectually
Stimulating

Easily
Understood

Benefit
Oriented

Mission
Based

Shows
Sustainability

Timely

Compelling

Results
Oriented



Outcomes of the Case for Support



- Campaign Brochure
- Powerpoint Presentations
- Speeches
- Newspaper Articles
- Grant Proposals
- Leader and Donor Enlistment

Building Your Campaign Case for Support

A well-written, persuasive Case for Support that clearly articulates a bold vision is a critical foundation for building a successful campaign.

CapDev's counsel and case writer will work with your team to prepare the first draft of your written case for support. We have provided a tool below to help (1) identify the goals of the campaign, (2) determine the funding priorities that will help reach campaign goals, and (3) to explain the importance of these goals to the philanthropic community.

The thinking behind these questions will set your campaign up for success:

1. **Campaign Goal:** *(example: Raise \$2 million to ensure that children ages 5-12 can learn about eating healthy foods and develop cooking skills in a safe after-school environment.)*
2. **Campaign Timing:** *(Why should this happen now? What happens if no action is taken?)*
3. **Funding Priorities:** *(include as many funding priorities as necessary to accomplish the goal – can be a mixture of physical space, equipment, programmatic, endowment, etc. AND a cost estimate for each)*
 - Funding Priority 1:
 - Funding Priority 2:
 - Funding Priority 3:
 - Funding Priority 4:
 - Funding Priority 5:
4. **Why:** *Why does this project matter? (draft a statement that explains the driving force behind why the goal and funding priorities will lead to better outcomes for the target population and the community, using a mixture of data and anecdotal evidence)*

Who should be quoted in the case for support? *Identify 4-5 constituent stakeholders (staff, volunteers, clients, donors) who can provide different viewpoints for the case writer to interview.*

- 1.
- 2.
- 3.
- 4.
- 5.



FCDS Case for Support



<https://www.fcds.org/the-campaign-for-fcds>

At FCDS, we believe that great schools happen when three key elements—exceptional people, world-class programs, and outstanding facilities—converge and thrive. Thanks to the generosity and support of those who invest in our school, those elements come together every day at Forsyth Country Day, allowing us to provide the best possible educational experience for every member of our school community.

We are committed to inspiring a strong culture of philanthropy and community engagement, which is essential to support a leading independent school education and the healthy growth of our school. The outpouring of support from parents, alumni, alumni parents, grandparents, and friends enables FCDS to fulfill our mission and expand our vision for what's ahead!



Leadership



Leadership Enlistment

How **NOT** to
enlist leaders:

“Would you like to or do you know anyone who might like to be on the Board of X? I am on the board and we are desperate to find some more go-getter type women. I promise it is not much of a time commitment - six meetings a year. And I would be forever in your debt.”



Leadership Enlistment Process





Campaigns Start with a Planning Committee

The **Campaign Planning Committee** oversees the planning and preparation phase of the proposed capital campaign, and is responsible for:

1. Approval of the case for support
2. Assist with identification and evaluation of major donor prospects and campaign leadership
3. Advise on effective leader and major donor cultivation and recruitment strategies
4. Hosting a donor cultivation event, meeting, tour, or other donor educational activity
5. Review and approve campaign goals, objectives, and strategies
6. Identify and recruit **Campaign Cabinet** committee members
7. Approval of campaign budget and campaign infrastructural changes
8. Attend regular (monthly) meetings

Once the **Campaign Cabinet** is created, the work of the **Campaign Planning Committee** is complete.



Board's Role in Campaign & in Philanthropy

- **KNOW!** Understand the mission/campaign and advocate
- **OWN!** Take responsibility in campaigns
- **GIVE!** Make organization a “Top 3” philanthropic priority
- **INFLUENCE!** Ensure 100% board participation in giving
- **LINK!** Leverage relationships and make introductions
- **SPEAK!** Engage & educate prospective donors
- **WRITE!** Sign & send thank you notes
- **SHOW UP!** Participate in events
- **ASK!** Take part in solicitations as appropriate
- **STEWARD!** Thank and account for gifts
- **CELEBRATE!** Recognize successes!



Staff Roles in Campaign & in Philanthropy

- **Be prepared** and organized
- **Be sensitive** to time constraints
- **Be adaptable** to leaders' schedules
- **Be responsive** and supportive
- **Be knowledgeable** about relationships/contacts
- **Be proactive** and capture all donor details and cultivation strategies in the database



Donors



Donor Engagement

How NOT to
appeal to
donors:

*“As you know, I’m on the board of
[ORGANIZATION].*

*We need to raise \$50,000 by the end of
June or we may have to close.*

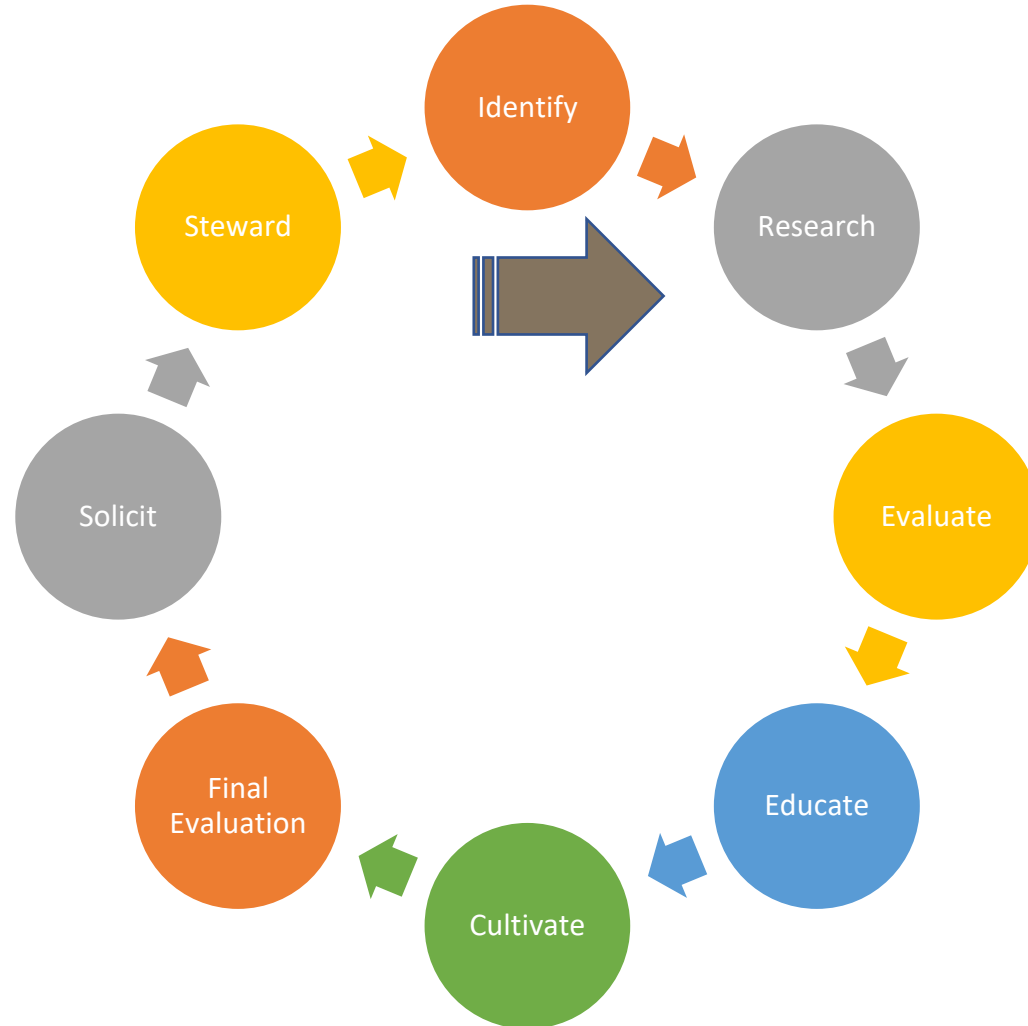
I know you support many great causes.

Can you give anything to help us?

*I promise I will not keep bothering you
with future requests.”*

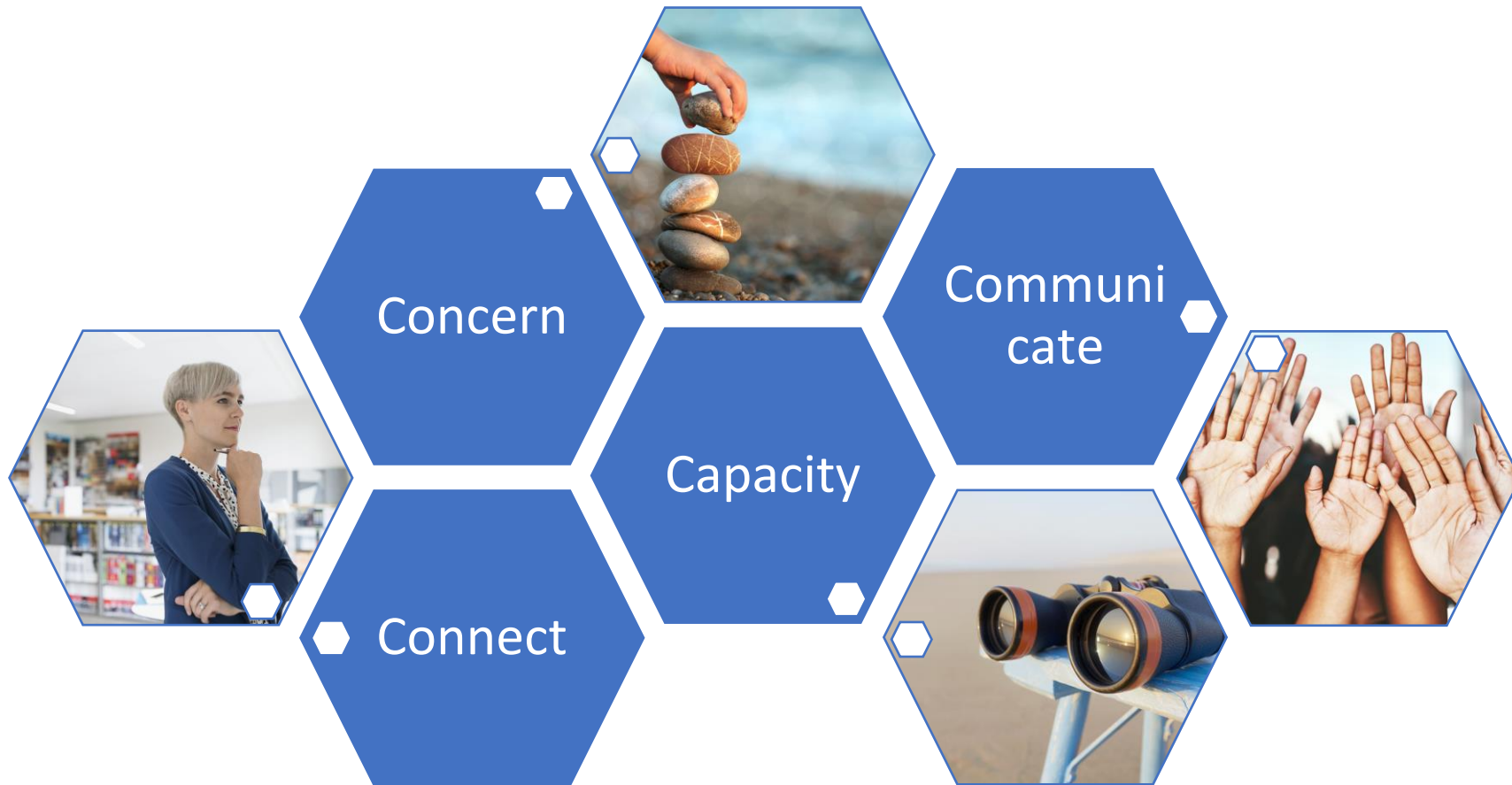


Donor Relations Cycle





Donors: Who Makes a Good Prospect?





Example: \$5 Million Gift Chart





Moves Management: Prioritizing Grid

ABILITY →	1	2	3
AFFINITY ↓			
3	3 – love you but can't give	6 – love you and might give	9 – love you and can give
2	2 – like you but can't give	4 – like you and might give	6 – like you and can give
1	1 – know you but can't give	2 – know you and might give	3 – know you and can give



The 5 “Rights” of the Art of the Ask



Right Person: who is asking whom; who talks; who asks



Right Time: are they ready to be asked; cultivation – education – awareness



Right Place: make it a comfortable atmosphere for the donor



Right Amount: research and consult to determine range



Right Project: is the donor interested, knowledgeable and invested



Cultivating & Stewarding: Manners Matter

- Please = **Cultivation**; Thank You = **Stewardship**
- Let the donor teach you
- Pick up on their manners
- Mimic their communication style
- Listen and learn
- Consider personal abilities in hiring staff
- Polite email communications
- Ask supporters what they like to do, plan events they will like
- Consider thoughtful, creative thank-yous
- Donors want to see your: energy, enthusiasm, empathy!

“The hardest job kids face today is learning good manners without seeing any.”
Fred Astaire





FCDS: Working with CapDev & Leadership in Campaign

- FCDS partnered with CapDev through all phases of the 5-year Campaign for Forsyth.
- This included scheduled planning and strategy sessions, calls whenever needed, prospecting and more.
- The differentiator with CapDev is the personal approach they take in all aspects of their partnership.
- Each member of their team who worked with us has demonstrated a passion for our mission and success.
- We continue our relationship with them even beyond our contracted time as they are not only strategic partners, but friends.
- CapDev helped engage critical leaders who have made the campaign successful.



Capacity



Infrastructure



Staffing

consider turnover;
focus on building
and sustaining
relationships



Budget

software &
hardware, admin.
etc. (next slide)



Policies & Reports

Gift acceptance,
recognition...
Dashboard report
formats



Database

tracking and
reporting + donor
metrics



Communications

make full use of
tools:

Printed Materials

Emails – remember
your signature too

Social Media

Website – user
friendly? Updated?

“You must do well to do good.”



Campaign Budget

Think of the overall campaign budget as a small percentage of the campaign goal.

*Usually under 10% range**

Campaign Budgets (separate from Operating Budget) **generally include:**

- Campaign staff salaries
- Travel
- Donor cultivation/events & meeting
- Donor database, office equipment
- Printing/Marketing + postage
- Donor recognition
- Campaign Counsel

**economies of scale apply, depending on campaign goal*



FCDS: Top 10 Build-Up in Preparation for Campaign

10. The Board of Trustees owns the campaign.
9. Each trustee should reflect on how to contribute their best combination of time, talent and treasure during the campaign (skills inventory provided).
8. Determining leadership/roles is the most vital task for any campaign. This includes paid staff and volunteers.
7. Set an achievable goal based on analytics.
6. All trustees should make their best multi-year pledge to the campaign, which informs the goal. Typically a board will support a campaign at a minimum of 20% of the total goal.
5. Prepare. All members of the leadership team must be equipped with intended messaging, i.e. the “why” of the campaign and set up conversations during the quiet phase.
4. Plan with flexibility in mind.
3. Go public when it works best for the school and your messaging. Typically once you’ve reached at least 60% of the goal.
2. Focus on the mission of The Fletcher School. Use the campaign as an opportunity to build community and to educate the community.
1. ***Have fun!***



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- Leadership
- Donors
- Capacity



Takeaways

What is most helpful for you from this time:

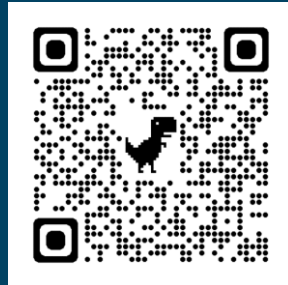
- How do you get started?
- How to keep momentum in a long-term campaign process?
- 3 things you could do now...



" What did you take away from the meeting ? "



Thank you



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Q&A and Discussion