



PRESENTATION TO

**EPN Pre-Conference**

Campaign Essentials

March 3, 2026



## About Us

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.

### 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.

Download today's slides:





# Getting Acquainted

- Are you with a church, a faith-based nonprofit, school, or other?
- Staff or vestry/board/committee lay member?
- How many of you are the only one doing fundraising/stewardship at your church or organization?
- Has the church/organization ever conducted a major campaign?
  - Have YOU ever led a campaign?
- Are you considering a major campaign in the next year or so?
  - Are there major capital/maintenance needs?
  - Are there reserve funds for operations/maintenance needs?
  - Endowment?
- *Are these questions scary?*



# Start with the Basics



# What is Unique About Episcopal Church Campaigns?

- Spiritually guided by priests & vestry
  - Process of discernment of priorities is critical; not hasty
  - Justify decisions before launching campaign
- Communications with parish throughout
  - Inclusive; all voices heard
  - Hold frequent opportunities for listening, learning, engaging
- Campaign leaders build relationships and communicate intentionally with other members
  - *“Spiritual discipline of giving”*
- Expect long lead/MG phases (hundreds of intentional conversations)



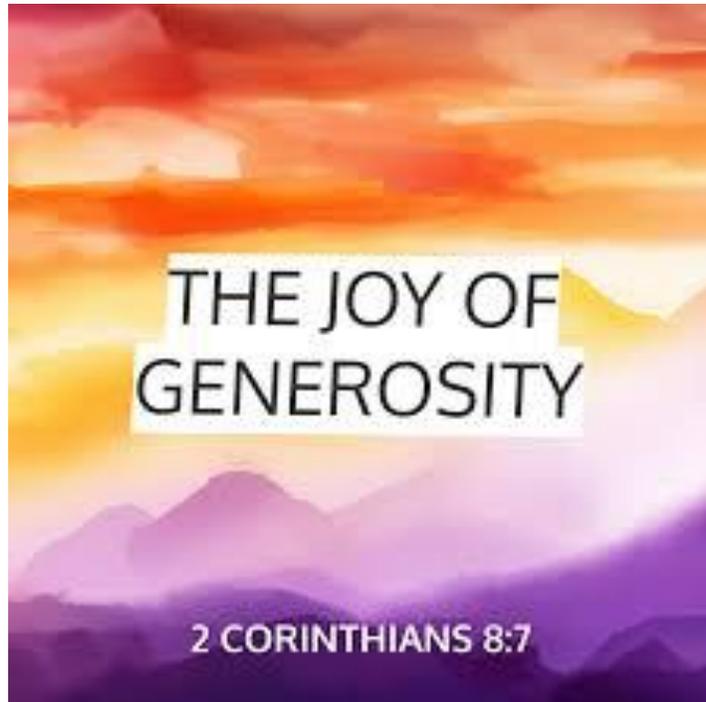
# Your Giving Tree



- ← Leaves & Limbs: giving transforms
  - ← the giver
  - ← the church
- ← Trunk: Holy Spirit – relationship
  - ← tied in with Christ
  - ← through the church/organization
- ← Fertilizer: sharing the invitation
- ← Roots: rooted in good soil
  - ← pledging
  - ← tithing



# Sharing the Joy of Generosity



*But since you excel in everything - in faith, in speech, in knowledge, in complete earnestness and in the love we have kindled in you - see that you also excel in this **grace of giving.***

2 Corinthians 8:7

Message:

Talk about giving, from the pulpit  
Giving strengthens our faith



# Money in The Bible



- Well over 2000 mentions of money
- One of the most frequent subjects in scripture
- Jesus: many financial parables (15%)
- True wealth lies in spiritual riches; not greed
- Money management verses:
  - Giving to the poor
  - Avoiding debt



# 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 Stewardship:** 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 Parish
  - Number and gift levels of donors
  - Fundraising capacity and abilities of the Parish
  - Quantity, quality and commitment of volunteer leadership
  - Long-term financial stability

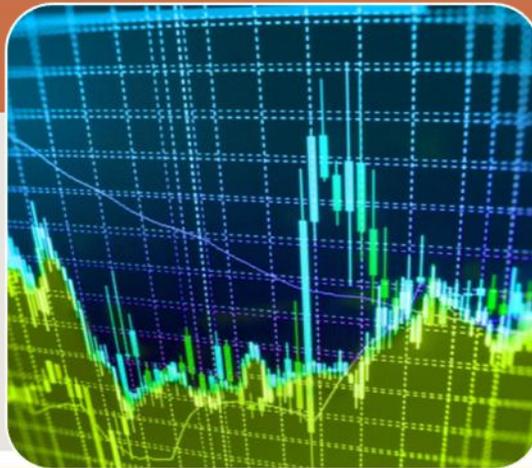


# Getting Started

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 exemption
- Approved plan of action with defined objectives
- Operational budget with financial capability for fundraising objectives
- Parish awareness

## Vision

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

## Leadership

- Strong Vestry support
- Parish leadership represented
- Clergy and staff buy-in
- Consideration of potential campaign leaders

## Donors

- Database of past and current membership records
- Actively engaged in stewardship/giving
- Prospective major donors identified (and possibly cultivated)

## Infrastructure

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



# Campaign Readiness Assessment Exercise



## 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*
	<b>ORGANIZATIONAL STRUCTURE:</b>	
	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	
	<b>VISION:</b>	
	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	
	<b>LEADERSHIP:</b>	
	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)	
	<b>DONORS:</b>	
	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)	
	<b>CAPACITY:</b>	
	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.



# 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
- Members of the congregation are at arms-length
- If major gifts occur, they're usually a surprise

## **After: Relational**

- Parish understands the need for giving
- Everyone is an ambassador
- Christ-focused, donor-centric
- All are welcomed, encouraged to give
- Rector sees him/herself as face of the church and is 100% committed to stewardship
- All leaders make a gift

***Transformational!***



# Essential Tools to Build a Campaign



*building a*  
**Philanthropy  
TOOLKIT**

- Case for Support
- Leadership
- Donors
- Capacity



# Case for Support



# Components of the Case for Support

Emotionally  
Stimulating

Intellectually  
Stimulating

Easily  
Understood

Benefit  
Oriented

Mission  
Based

Shows  
Sustainability

Timely

Compelling

Results  
Oriented

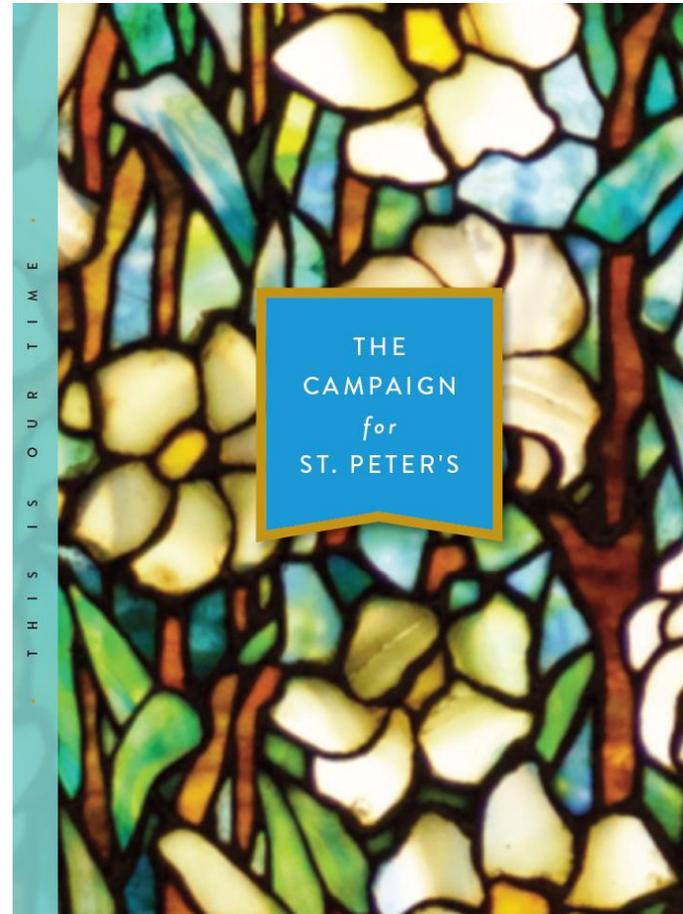


# Campaign Case Example: St. Peter's

## Thinking Big About Campaign Objectives

*"The mind can be convinced, but the heart must be won."*

- Simon Sinek



**Planned Capital Investments**

- A renovated chancel and altar platform, restored to its historical intention, with imagery and accessibility that honors our strategic planning and therefore the commitment to diversity and inclusion that lies at the heart of our calling.
- Renovations to the Parclose Chapel, which is currently where our altar servers sit and where the piano is housed, to make space for an architecturally crafted ramp that makes the altar accessible to everyone.
- The addition of two new stained glass windows to the Parclose Chapel ramp, providing beauty and light to the new sacred space.
- Renovations to the Chapel of All Saints, making it a distinct sacred space and giving our existing mosaic a new home as a defining feature.
- The addition of two new stained glass windows to the Chapel of All Saints.
- Repair and renovation to the spaces used by our youth and music programs, addressing the safety and capacity of our basement.
- The restoration of bricks and mortar on our historic building.
- The restoration of stained glass windows on our historic building.
- Critical repairs to the roof on our education building.
- Additional support for community partnerships who address outreach and social justice in the Charlotte area.

**The Campaign for St. Peter's (Phase I):**

- Chancel and Chapels \$2,500,000
- Restoration to Brownstone, Brick, and Stained Glass \$1,500,000
- Renovation and Repairs to the Basement \$500,000
- Roof Repairs \$240,000
- Outreach and Social Justice \$500,000
- Architecture and Design \$138,000
- Campaign Operating Expenses \$275,000
- The Campaign for St. Peter's Fundraising Goal: \$5,653,000

**The Campaign for St. Peter's (Phase II) Estimated:**

- Remaining Cost of Restoration to Brick and Brownstone and Windows over 10 years \$5,500,000
- Additional Investment in Outreach and Social Justice \$500,000



# A Simple Case for Support Structure

Use this basic template to build your case for support:

Front:

1. Why
2. What
3. How

Back:

1. Story
2. Plans
3. Info

Capital Campaign Discussion Guide, Page 1



Capital Campaign Discussion Guide, Page 2 (backside)





# Leadership



# Leadership Enlistment

How **NOT** to  
enlist leaders:

*“Would you like to or do you know anyone who might like to be on the Campaign Committee at St. Peter’s? I am on the Vestry 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

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# Campaigns Start with a Planning Committee

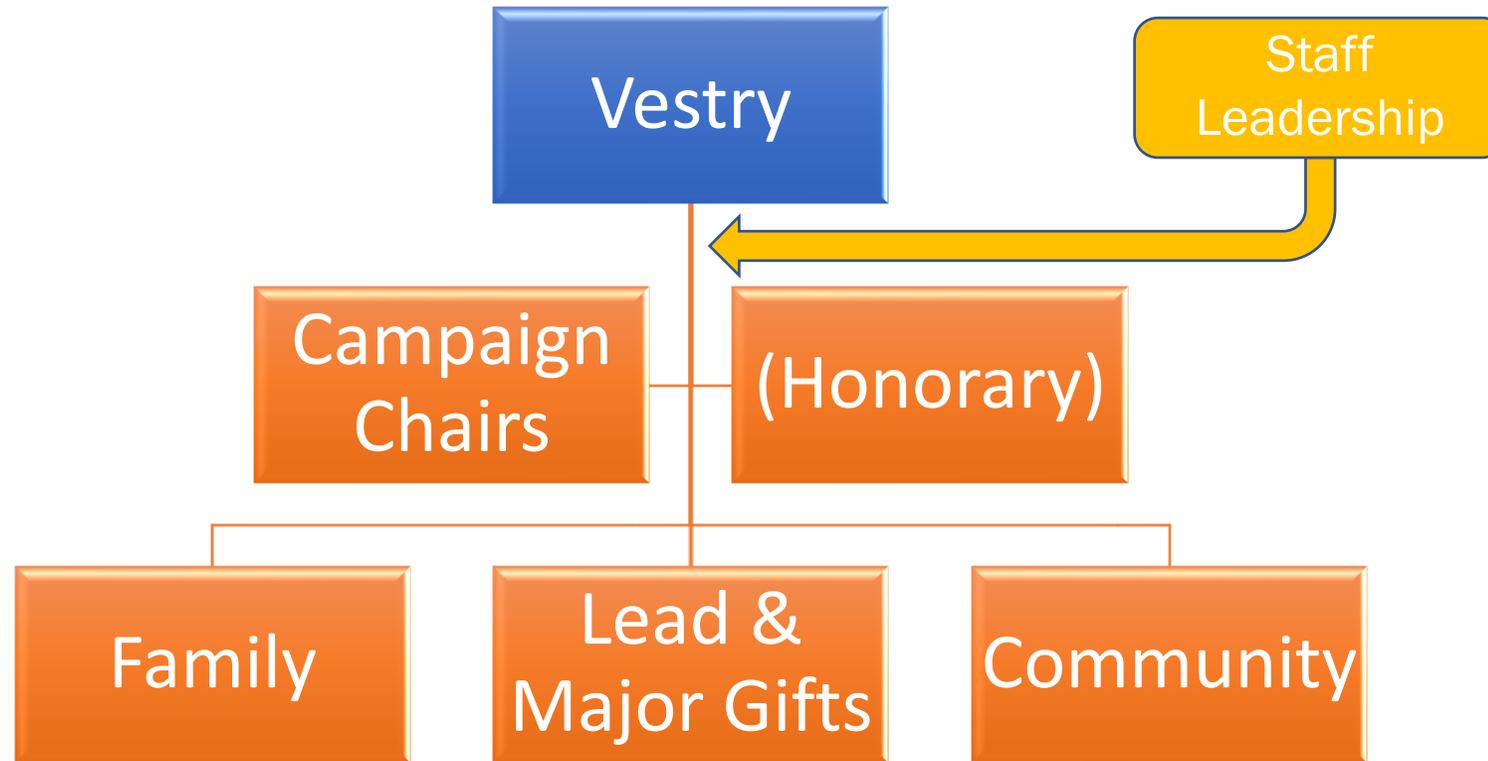
The **Campaign Planning Committee** oversees the planning and preparation phase of the proposed capital campaign, and is responsible for:

1. Approval of the case for support
2. Assist with identification and evaluation of leadership givers at the Parish and campaign leadership
3. Advise on effective leader and leadership supporter cultivation and recruitment strategies
4. Hosting Parish member cultivation events, meetings, and 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.



# Sample Campaign Org. Chart





# Lay Leadership's Role in Philanthropy

- **KNOW!** Understand the mission/campaign and advocate
- **OWN!** Take responsibility in campaigns
- **GIVE!** Make Parish a “Top 3” philanthropic priority
- **INFLUENCE!** Ensure 100% Vestry 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

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- **Be prepared** and organized
- **Be sensitive** to time constraints
- **Be adaptable** to leaders' schedules
- **Be responsive** and supportive
- **Be knowledgeable** about relationships/contacts
  - Clergy do not have to know gift amounts
- **Be proactive** and capture all donor details and cultivation strategies in the database



# Compare Your Key Leader Types

Assess Leaders According to these leadership traits:

	<b>Top Volunteer Leader</b>		<b>Top Staff Leader</b>		<b>Top Fundraising Staff</b>
	Experienced		Experienced		Experienced
	Inexperienced		Inexperienced		Inexperienced
	Willing, energetic, interested		Willing, energetic, interested		Willing, energetic, interested
	Disengaged, hesitant, apprehensive		Disengaged, hesitant, apprehensive		Disengaged, hesitant, apprehensive
	Visionary		Visionary		Visionary
	Reluctant to change / status quo		Reluctant to change / status quo		Reluctant to change / status quo
	Collaborative		Collaborative		Collaborative
	Isolationist		Isolationist		Isolationist
	Big picture thinker		Big picture thinker		Big picture thinker
	Detailed “in the weeds”		Detailed “in the weeds”		Detailed “in the weeds”
	Pro-campaign, eager to ask		Pro-campaign, eager to ask		Pro-campaign, eager to ask
	Avoids personal asks		Avoids personal asks		Avoids personal asks

- Are executive and board leaders aligned with staff and supporters?
- Where is better balance needed?
- How might training be helpful?



# Donors



# Donor Engagement

How NOT to  
appeal to  
donors:

*“As you know, I’m on the Vestry of  
[name of church].*

*We need to raise \$50,000 by the end of  
June or we won’t make our budget.*

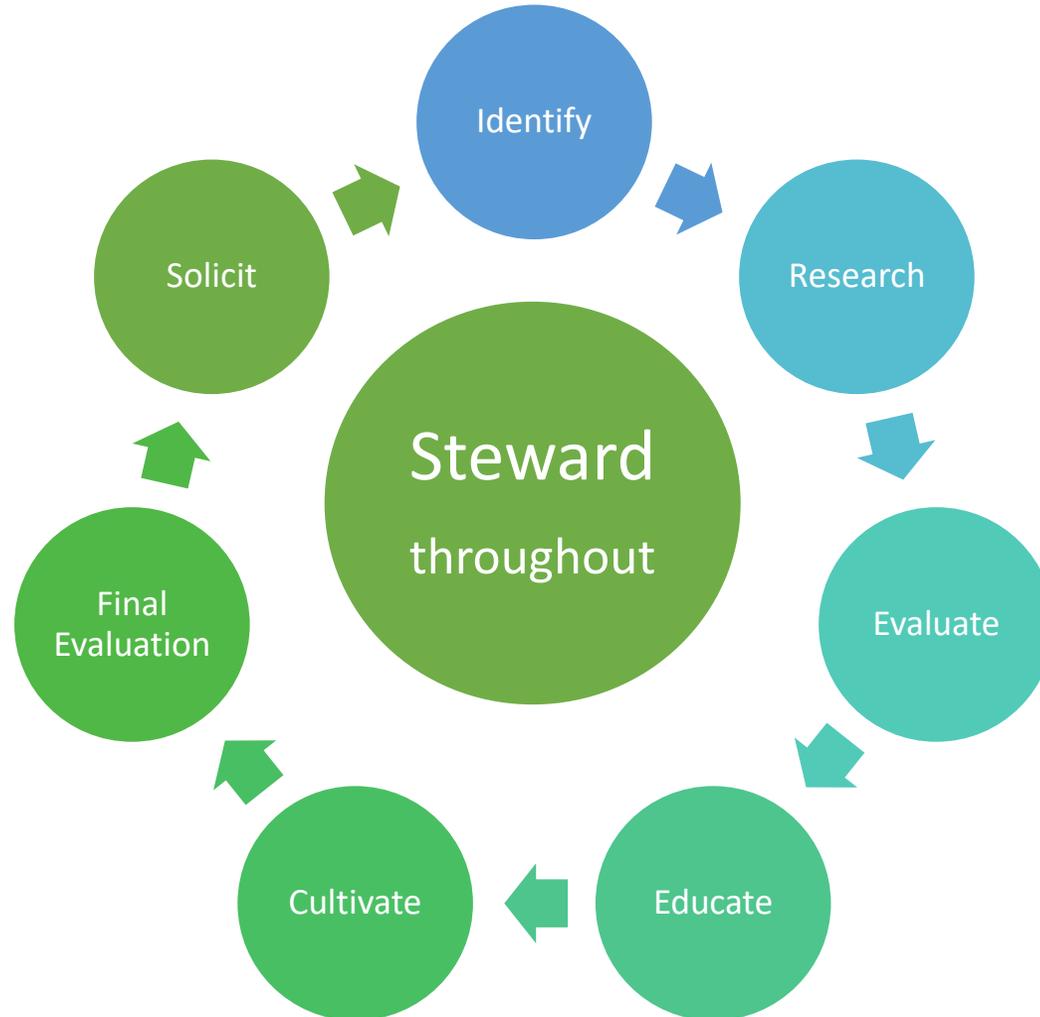
*I know you support many great causes.*

*Can you give anything to help us?*

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

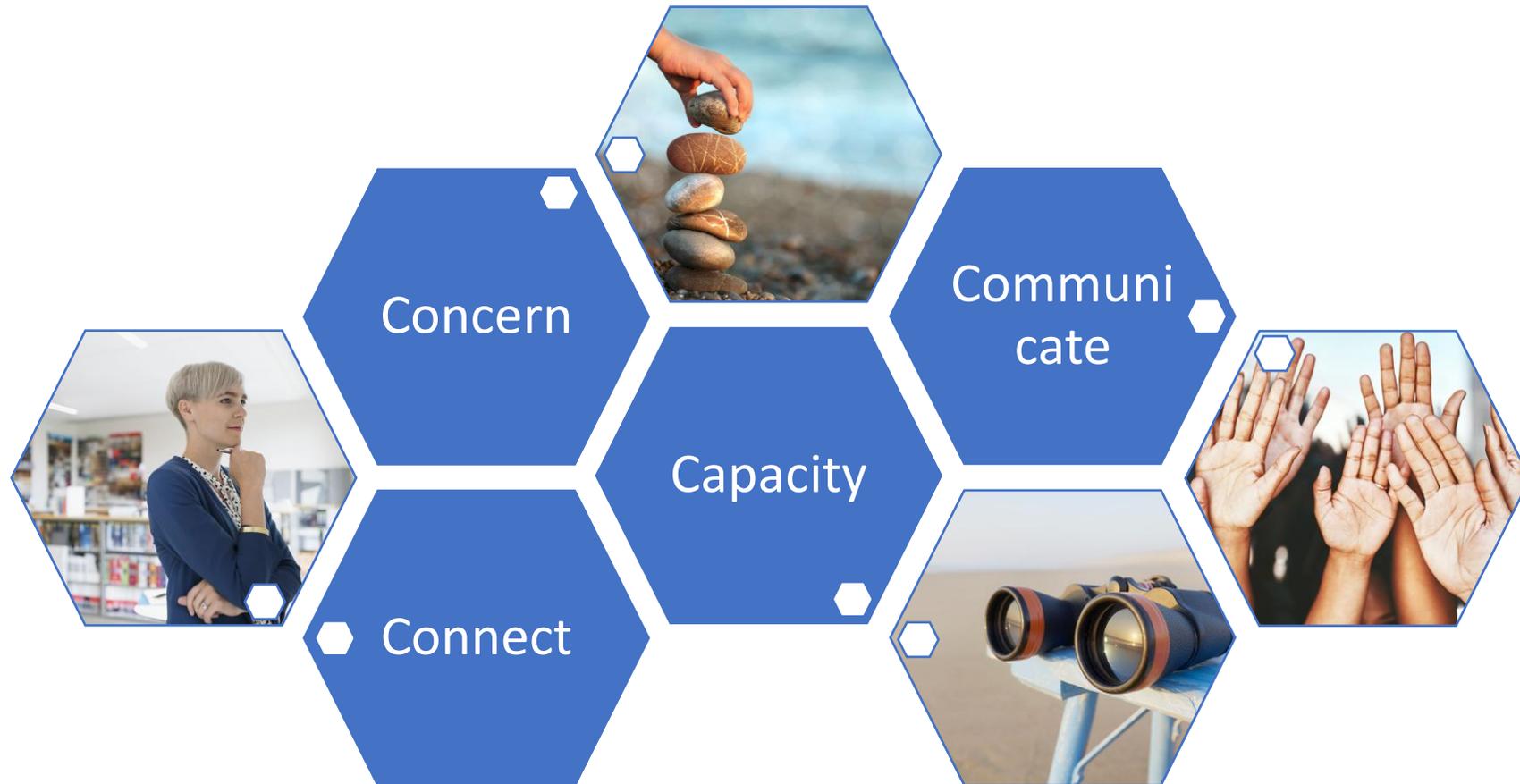


# Donor Relations Cycle





# Who Makes a Good Prospect?





# Example: \$5 Million Gift Chart





# Components of the Asking Process

## ***Asking is 90% preparation.***

1. Making the appointment
2. Materials preparation & usage
3. Making plans before the appointment
4. Making the ask
5. Responding
6. Following up



"We need to strike the right tone between asking and desperately pleading in our alumni solicitation letters."



# 10 Ways to Tell Donors They Made a Difference

1. Children's Art
2. Photo Book
3. Site Visit Video
4. Timely Mailed Gift
5. Video Testimonial
6. Handwritten Card
7. Call and/or Email
8. Face-to-Face Meeting
9. Personalized Gift
10. Memorialize the Gift





# Stewardship: Thank You Matrix Example

		Donor Type	Gift Amount	Acknowledgement Letter	New Donor Welcome Packet	Print Newsletter	Personal Email	Small Gift (Calendar, Magnet, etc.)	Major Donor Event	Phone Call from BOD	Quarterly Major Donor Special Newsletter	E.D. Handwritten Card or Call	Stewardship Trip	Special Invite
Monthly	Up to 9	X	X	X										
One-time	up to 99													
Monthly	10 - 29	X	X	X	X									
One-time	100 - 299													
Monthly	30 - 49	X	X	X	X									
One-time	300 - 499													
Monthly	50 - 99	X	X	X	X	X	X							
One-time	500 - 999							X						
Monthly	100 - 199	X	X	X	X	X	X	X	X					
One-time	1,000 - 2,499													
Monthly	200 - 399	X	X	X	X	X	X	X	X	X				
One-time	2,500 - 4,999													
Monthly	400 & up	X	X	X	X	X	X	X	X	X	X		X	
One-time	5,000 & up													
<b>Bequest</b>			X	X			X	X	X	X				



# Capacity



# Infrastructure Elements



## 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.”*



# Communications for Faith-Based Campaigns

- Intentional conversations throughout → leads to major gifts (MG)
- Focus groups:
  - Before: visioning
  - During: building MG relationships
    - ▶ Home visits
    - ▶ Listening tours
- Feasibility study: cultivation tool; listening opportunity
- Digital surveys: gathering broader input; inclusive
- Campaign theme, slogan, materials (digital and print)
- Integrate campaign into existing digital and print communications



# Campaign Budget

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

*Usually 5-8%  
Range*

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

- Campaign staff salaries
- Travel (if applicable)
- Donor cultivation/events & meetings
- Donor database, office equipment
- Printing/Marketing + postage
- Donor recognition
- Campaign Counsel



# Essential Tools to Build a Campaign



*building a*  
**Philanthropy  
TOOLKIT**

- Case for Support
- Leadership
- Donors
- Capacity



# Takeaways

What is most helpful for you from this session:

- Lingering questions?
- How do you get started?
- 3 things you could do now...



" What did you take away from the meeting ? "



**Thank you**



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Q&A and Discussion