

# PRESENTATION TO **VFRI**

Lessons Learned from Campaigns



*Serving nonprofits across the Southeast since 1984*

Development Planning & Campaigns  
Executive Search



## 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.

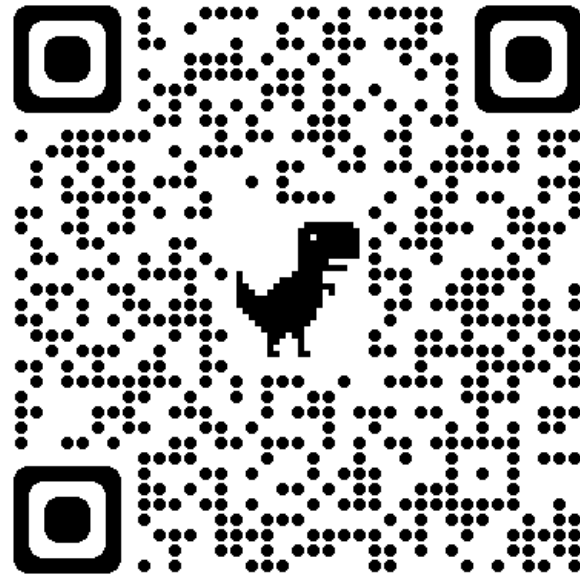
#### **Embolden**

We encourage talent and leadership.

#### **Embrace**

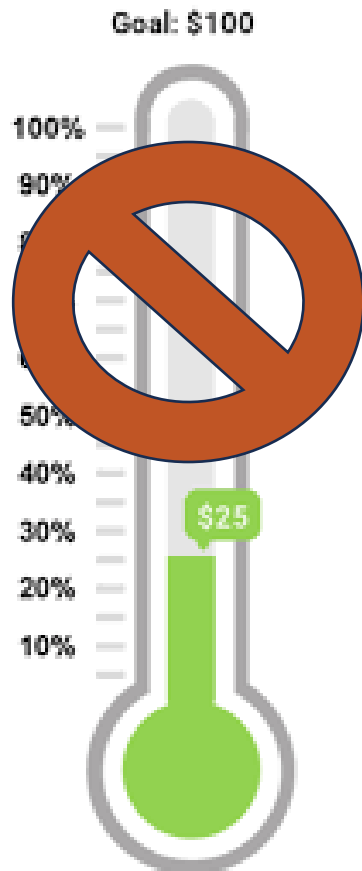
We transform lives through relational philanthropy.

Download today's slides:





# The Importance of Campaign Preparation



## 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
  - Build relationships and reconnect members of all constituencies



# Example: Grymes Memorial School Campaign



## The Campaign for Grymes:

Comprehensive Campaign for:

- Penny Work Center for the Arts
- Lee Kane Gymnasium
- Grizzly Atrium

**Started: 2022**

**Concluded: 2025**

**Goal: \$12M**

**Raised: \$12,084,275.09**

<https://grymesschool.org/ways-to-give/campaign-for-grymes/>



# #1: The Importance of Due Diligence

- Expertise
- Feasibility study
- Readiness assessment

## **Understand to see your assets & your gaps:**

- Internal culture
- Donor base
- Institutional strengths
- External perception





## #2: Campaigns Always Have Surprises

### A defining moment from great loss:

- Penny Work, former head of school
- Donor named new arts center in her memory
- Reshaped tone of campaign





## #3 Power of Leaders, Relationships and Patience

- Identify, nurture and enlist leaders
- Multi-generational families: histories, connections, expertise
- Building foundation relationships:
  - Aligned focus
  - History with a peer

### **Advice:**

- Let leaders' voices be heard
- Provide consistent communications/updates
- Take time for trust-building





## #4: Messaging Inspires Spirit

- Create compelling messaging
  - Moves hearts
  - Opens doors
- Share to keep momentum:
  - Progress
  - Gratitude
  - Impact stories
- Involve a strong marketing partner / creative team





## #5: Broadening the Circle

- What connects a potential donor to the organization/school?
- Motivations are often connected to:
  - Memories
  - Values
  - Community pride
- Include young alumni/donors
  - Enthusiasm
  - Creative giving ideas
  - Willing champions
- Use social fundraising





## #6: The Power of Comprehensive Strategy

Combine elements into your campaign:

- Capital
- Endowment
- Annual fund

Reimage events: biennial gala

- Shifted usual AF focus to campaign theme
- Record-breaking results





## #7: When Local Values Rewrite the Playbook

- Change up traditional sponsorship models:
  - From tiered levels with logo placements and transactional perks
  - To better fit local giving culture:
    - ▶ Shared values
    - ▶ Impact
- Sponsors shift to true partnerships, grounded in
  - Listening
  - Trust
  - Deeper understanding of community priorities





## #8 Think About Events Differently

- Hold smaller, intentional events
- Examples:
  - Legacy Trustee Chairs event  
→ now annual (in homes or club)
  - Held Legacy Faculty and Staff event  
→ now annual
  - Targeted neighborhoods
  - Downtown staffers
  - Legacy Family event





## #9: Campaign Stewardship Affects the Future

- Create a Stewardship Plan
  - For campaign gifts
  - Impact continues beyond campaign
- Appoint a Stewardship board leader

|          |               | 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                 |                     |                                          |                               |                  |                |
| One-time | 1,000 - 2,499 |            |             |                        |                          |                  |                |                                     |                   |                     |                                          |                               |                  |                |
| Monthly  | 200 - 399     |            | 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                                        |                               |                  |                |
| One-time | 5,000 & up    |            |             |                        |                          |                  |                |                                     |                   |                     |                                          |                               |                  |                |
| Bequest  |               |            |             | X                      | X                        |                  |                | X                                   | X                 | X                   | X                                        |                               |                  |                |

“

**You do not rise to the level of your goals. You fall to the level of your systems.**

JAMES CLEAR  
*Atomic Habits*



# FCDS Stewardship Matrix Example

| Stewardship Task Distribution                            |  | Performed by                | \$1M+ | \$500k+ | \$250k+ | \$100k+ | \$50k+ | \$25k+ | \$5k+ | \$2.5K+ | \$1k+ | <\$1K | Trustee | Faculty Staff | New Family | Alumni | Planned Gift |
|----------------------------------------------------------|--|-----------------------------|-------|---------|---------|---------|--------|--------|-------|---------|-------|-------|---------|---------------|------------|--------|--------------|
|                                                          |  |                             |       |         |         |         |        |        |       |         |       |       |         |               |            |        |              |
|                                                          |  |                             |       |         |         |         |        |        |       |         |       |       |         |               |            |        |              |
|                                                          |  |                             |       |         |         |         |        |        |       |         |       |       |         |               |            |        |              |
| Head of School, Associate Head of School for Advancement |  |                             |       |         |         |         |        |        |       |         |       |       |         |               |            |        |              |
| Formal Acknowledgment Thank You Letter                   |  | Head of School              | ✓     | ✓       | ✓       | ✓       | ✓      | ✓      | ✓     |         |       |       | ✓       | ✓             |            |        | ✓            |
| Phone Call                                               |  | Head of School              | ✓     | ✓       | ✓       | ✓       | ✓      | ✓      |       |         |       |       |         |               |            |        | ✓            |
| Formal Acknowledgment Thank You Letter                   |  | Assoc. Head of School Adv.  | ✓     | ✓       | ✓       | ✓       | ✓      | ✓      | ✓     |         |       |       | ✓       | ✓             |            |        | ✓            |
| Phone Call                                               |  | Assoc. Head of School Adv.  | ✓     | ✓       | ✓       | ✓       | ✓      | ✓      |       |         |       |       |         |               |            |        | ✓            |
| Update and Review Major Gift Portfolios                  |  | <a href="#">Link</a>        |       |         |         |         |        |        |       |         |       |       |         |               |            |        |              |
|                                                          |  |                             |       |         |         |         |        |        |       |         |       |       |         |               |            |        |              |
| Board of Trustees                                        |  |                             |       |         |         |         |        |        |       |         |       |       |         |               |            |        |              |
| Formal Acknowledgment Thank You Letter                   |  | Board Chair                 | ✓     | ✓       | ✓       | ✓       | ✓      | ✓      |       |         |       |       | ✓       |               |            |        | ✓            |
| Formal Acknowledgment Thank You Letter                   |  | Chair of Adv. Sub.          | ✓     | ✓       | ✓       | ✓       | ✓      | ✓      |       |         |       |       | ✓       |               |            |        | ✓            |
|                                                          |  |                             |       |         |         |         |        |        |       |         |       |       |         |               |            |        |              |
| Philanthropy Team                                        |  |                             |       |         |         |         |        |        |       |         |       |       |         |               |            |        |              |
| Formal Acknowledgment Thank You Letter                   |  | Dir. of Philanthropy        | ✓     | ✓       | ✓       | ✓       | ✓      | ✓      | ✓     | ✓       | ✓     | ✓     | ✓       | ✓             |            |        | ✓            |
| Formal Acknowledgment Thank You Letter                   |  | Assoc. Dir. of Philanthropy | ✓     | ✓       | ✓       | ✓       | ✓      | ✓      | ✓     | ✓       | ✓     | ✓     |         |               | ✓          |        | ✓            |
| Formal Acknowledgment Thank You Letter                   |  | Dir. of Alumni              |       |         |         |         |        |        |       |         |       |       |         |               |            | ✓      |              |
| First Time Gift Acknowledgment Postcard                  |  | Donor Relations             |       |         |         |         |        |        |       |         |       |       |         |               | ✓          |        |              |
| Gift Acknowledgement, Thank You, & Rece                  |  | Donor Relations             | ✓     | ✓       | ✓       | ✓       | ✓      | ✓      | ✓     | ✓       | ✓     | ✓     | ✓       | ✓             | ✓          | ✓      | ✓            |
| Update and Review Major Gift Portfolios                  |  | <a href="#">Link</a>        |       |         |         |         |        |        |       |         |       |       |         |               |            |        |              |



# Example: Donor Stewardship Matrix

| Donor Stewardship Matrix                        |                |                   |                  |                  |                   |                          |             |
|-------------------------------------------------|----------------|-------------------|------------------|------------------|-------------------|--------------------------|-------------|
| Annual Giving Societies                         | Vision Society |                   |                  | 1970 Society     |                   | Additional Giving Levels |             |
| Designations                                    | Founders' Club | Head's Table      | Trustees' Circle | Scholars' Circle | Honor Roll Circle | Forsyth Circle           | Supporter   |
| Gift Ranges                                     | \$20,000+      | \$10,000-\$19,999 | \$5,000-\$9,999  | \$2,500-\$4,999  | \$1,970-\$2,499   | \$500-\$1,969            | \$499-Below |
| Gift Acknowledgement, Thank You, & Receipt      | ✓              | ✓                 | ✓                | ✓                | ✓                 | ✓                        | ✓           |
| Hand Written Note from Head of School           | ✓              | ✓                 | ✓                | ✓                |                   |                          |             |
| Hand Written Note from Board Chair              | ✓              | ✓                 | ✓                |                  |                   |                          |             |
| Hand Written Note from Director of Philanthropy | ✓              | ✓                 | ✓                | ✓                | ✓                 |                          |             |
| Student Gratitude/Impact Message                | ✓              | ✓                 | ✓                | ✓                | ✓                 | ✓                        | ✓           |
| Head of School Update Letter                    | ✓              | ✓                 | ✓                | ✓                | ✓                 |                          |             |
| Annual Impact Report                            | ✓              | ✓                 | ✓                | ✓                | ✓                 | ✓                        | ✓           |
| December 1970 Society Gift Delivery             | ✓              | ✓                 | ✓                | ✓                | ✓                 |                          |             |
| State of School Event Invitation                | ✓              | ✓                 | ✓                | ✓                | ✓                 | ✓                        | ✓           |
| May 1970 Society Social Event                   | ✓              | ✓                 | ✓                | ✓                | ✓                 |                          |             |
| Head's Table Dinner                             | ✓              | ✓                 | ✓                |                  |                   |                          |             |
| June Donor Thank You Postcard                   | ✓              | ✓                 | ✓                | ✓                | ✓                 | ✓                        | ✓           |
| Amidst The Trees Magazine                       | ✓              | ✓                 | ✓                | ✓                | ✓                 | ✓                        | ✓           |
| Donor Newsletters (Fall and Spring)             | ✓              | ✓                 | ✓                | ✓                | ✓                 | ✓                        | ✓           |
| 1:1 With Head of School                         | ✓              | ✓                 |                  |                  |                   |                          |             |

# #10: Produce a Strong Proposal Template: Example



# Example Proposal: pg. 1-2

## For Here. For Now. For What's Ahead.

Forsyth Country Day School



### PROPOSAL IN HONOR OF THE SMITH FAMILY



FORSYTH COUNTRY DAY SCHOOL IS A COMMUNITY OF LEARNERS DEDICATED TO PREPARING OUR STUDENTS FOR WHAT'S AHEAD.



Forsyth  
For What's Ahead

## INNOVATING CLASSROOMS

At Forsyth Country Day School, we envision classrooms as dynamic, ever-adapting learning spaces that reflect the chameleon-like nature of learning itself. Our vision is rooted in the belief that the **physical environment profoundly shapes both wellness and educational outcomes**. To bring this vision to life, we draw inspiration from the WELL Building Standard, recognizing that a thoughtfully designed space can elevate the physical and emotional well-being of students and educators alike.

This past summer, we **completed a full transformation of our Middle School classrooms**, bringing this vision to reality for our students and teachers. Our next goal is to **extend this transformation to our Upper and Lower Schools** in the coming summer—ensuring every division benefits from innovative, wellness-centered spaces.



Multi-divisional classroom layouts that emphasize furniture flexibility and differentiated learning environments.

Our classrooms are intentionally designed as bustling hubs of activity, with expandable work zones that guide movement and focus, and dedicated nooks for small-group collaboration, hands-on making, content creation, and independent study. In these spaces, **flexibility meets purpose**—allowing teachers and students to adapt their environment to the evolving demands of learning. This intentionality transforms the classroom into a “third teacher,” shaping an immersive and holistic learning experience every day.

This vision is supported by a multi-year partnership with **Steelcase, Smith System, and STORR**—industry leaders in K-12 learning environments. Their recognition of Forsyth Country Day School's research-driven and student-centered approach underscores our shared commitment to transforming educational spaces. Through this collaboration, we continue to refine our approach to classroom design and implementation, ensuring every space is grounded in five key elements: **wellness, flexibility, standardization, technology, and accessibility**.

These core principles serve as the foundation for learning environments that accommodate diverse learning styles, support a range of instructional approaches—from collaborative work to focused individual tasks—prioritize health and cleanliness, and foster a sense of connection between the indoors and outdoors, and among members of our school community.



# Example Proposal: pg. 3-4

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## FCDS IS LEADING THE WAY

- **Average class size of 14** with **21 AP** and **19 Honors-level courses**.
- **Innovative learning environments**—modern classrooms implemented in each division and the Johnson Academic Center, in partnership with Steelcase—feature flexible furniture, optimized lighting, adaptive finishes, and integrated technology to support student growth.
- **Class of 2025: \$4.7M** in scholarships, **100% college acceptance** to 122 colleges in 17 states and two countries, including Stanford, Yale, Georgetown, Johns Hopkins, UPenn, UNC-Chapel Hill, and UVA.
- **National Merit Scholarship winner** in the Class of 2024.
- **Four-time Wells Fargo Cup winner** (2021-2024) as NC’s top athletic program; **16 state championships** from 2021-2025, a school record.
- **20+ major campus improvements** in seven years, including the Niblock Center, Williams Library Discovery Center, Danforth Middle School, Bloodworth Family Outdoor Classroom, Legacy Track, Williams Family Tennis Center, Perrott Athletic Tower, and Infinity Amphitheater.
- Mission—“**A Community of Learners Dedicated to Preparing Our Students for What’s Ahead**”—lived daily through personalized instruction, cross-division collaboration, and a culture of curiosity, compassion, responsibility, respect, and integrity.



Forsyth  
For **What’s Ahead**

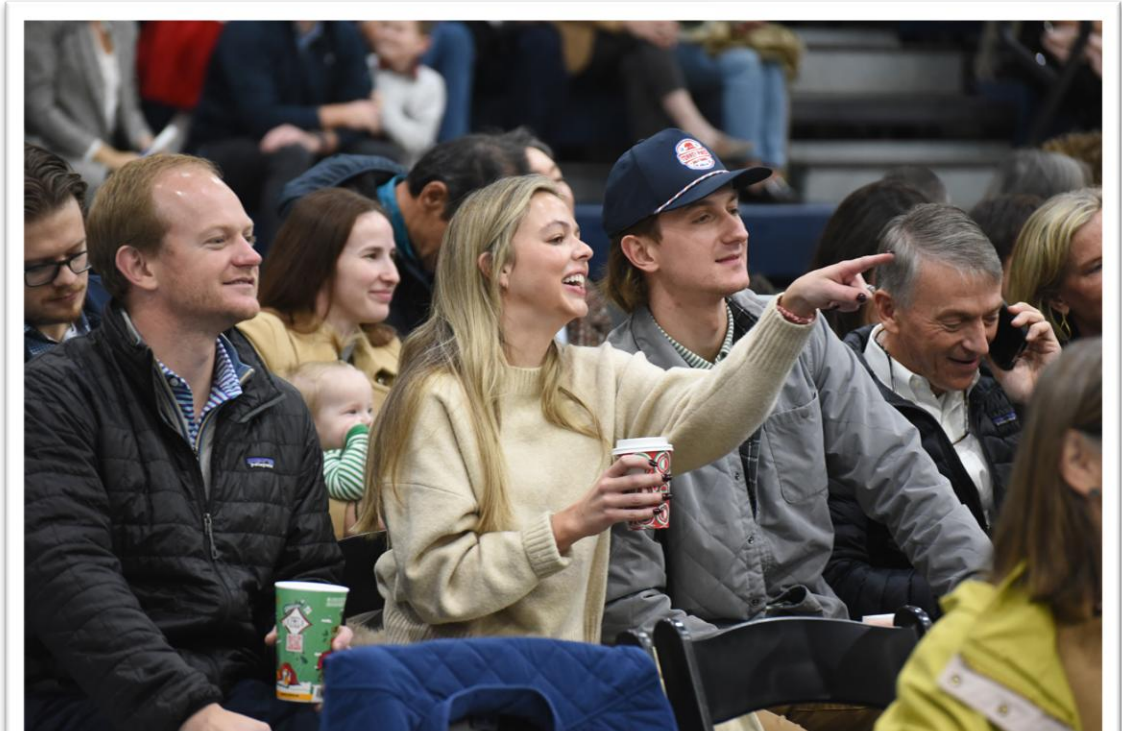


## #11: Continue the Major & Lead Gifts Program

- Developed robust major & lead gifts work in campaign
- Continuous work post-campaign

**Example:** largest current family gift in over 20 years came after campaign

**Example:** exceed annual fund goal every year since campaign started





**Thank you**

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Q&A and Discussion