

Preparing for a Major Campaign

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2.12.25



Serving nonprofits across the Southeast since 1984

○
Development Planning & Campaigns
Executive Search



Getting Acquainted

- Are you here with a church, a faith-based nonprofit, or other?
- Staff or board member?
- How many of you are the only one doing fundraising at your 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?*



What is a “Major” Campaign?



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”



What is Unique About Faith-Based Campaigns?

(compared to typical nonprofit campaigns)

- Staffing (stewardship vs. development)
- Clergy and lay leadership structures
- Culture – how is giving valued?
- Faith – where is God in this?
- Traditional FR best practices vs. faith-related practices
- How we steward – treating MG differently to maximize joy
- Confidentiality of donor records: who knows, training
- *What else?*



What is Unique About Church Campaigns?

- Governing body has a SP & supportive of direction
 - Process of discernment of priorities is critical; not hasty
 - Justify decisions before launching campaign
- Communications with congregation throughout
 - Inclusive; all voices heard
 - Hold frequent opportunities for listening, learning, engaging
- Campaign leaders build relationships and communicate intentionally with other members
- Expect long lead/MG phases (hundreds of intentional conversations)



Your Giving Tree



- ← Leaves & Limbs: giving transforms
 - ← the giver
 - ← the church/organization

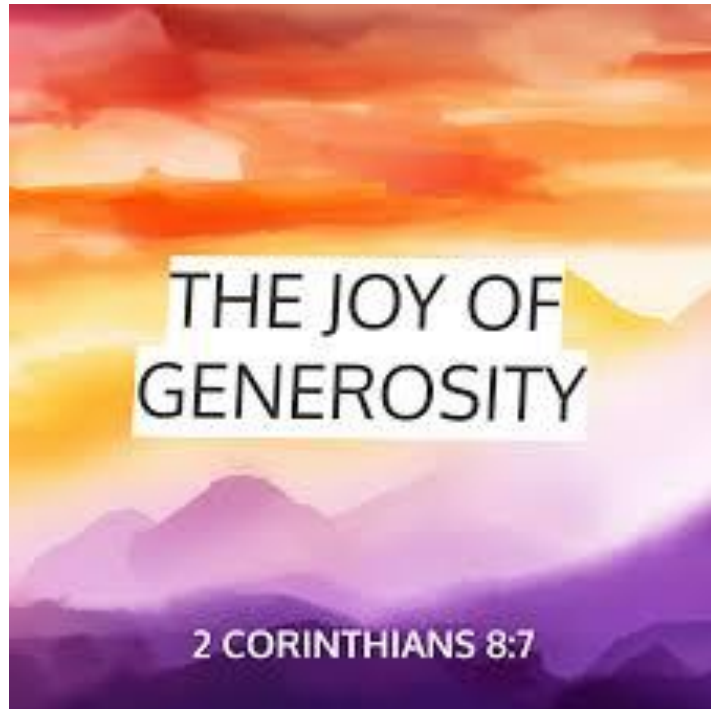
- ← Trunk: Holy Spirit – relationship
 - ← with Christ
 - ← with the church/organization

- ← 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.**

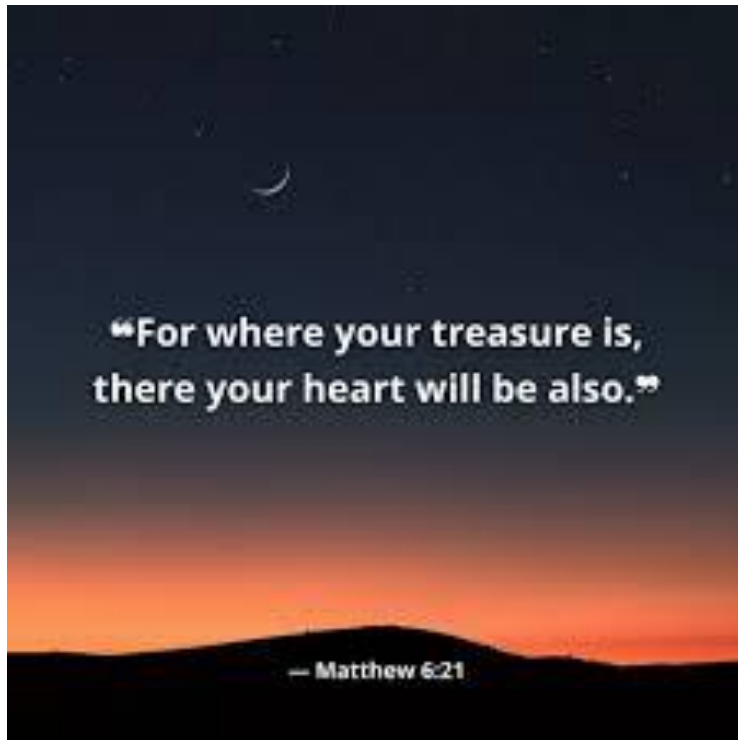
2 Corinthians 8:7

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



Exercise: Comparing Leader Types



Compare Your Key Leader Types

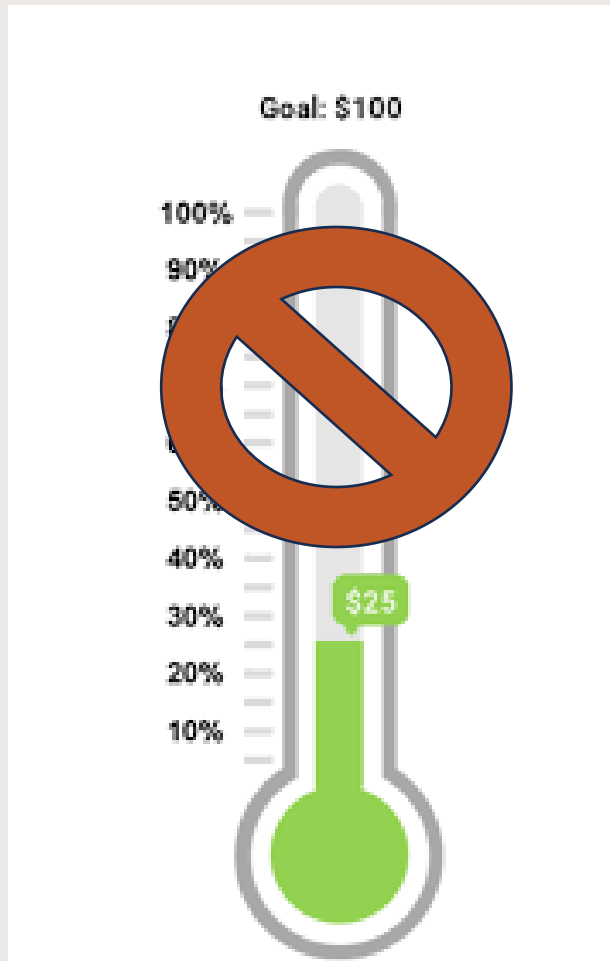
Assess Leaders According to these leadership traits:

	Top Volunteer Leader		Top Staff Leader		Top Fundraising Staff
	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?



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



Campaigns Start with Visioning

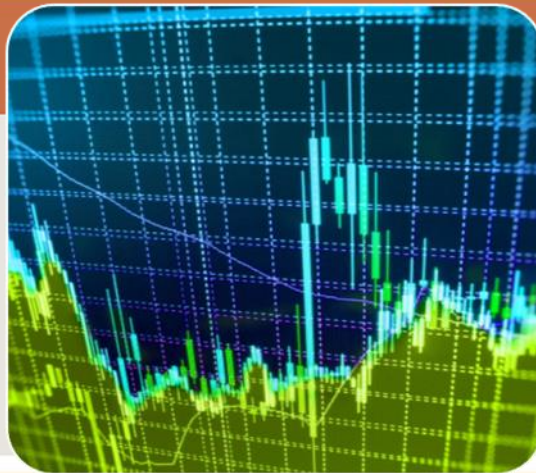


Getting Started

Strategic Planning



Financial Planning



Consensus Building



Critical Element



Shaping a Campaign Timeline



Communications Throughout!



Are You Ready?

Organizational Structure / Governance

- 501c3 tax-exempt status
- State charitable solicitation license
- Approved plan of action with defined objectives
- Operational budget with financial capability for fundraising objectives
- Bylaws & committee structures

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 / lay leadership support
- Variety skillsets & demographics
- Executive staff buy-in
- 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



Are You Ready for Campaign? Assessment Tool



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.



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./lead sees him/herself as face of the agency and is 100% committed to fundraising
- All make a gift



From Visioning & Assessing to Enacting a Campaign



Essential Tools to Build a Campaign



building a
Philanthropy
TOOLKIT

- Case for Support
- Leadership
- Donors
- Capacity

All encased in spirituality



#1 Building a Case for Support

Emotionally
Stimulating

Intellectually
Stimulating

Easily
Understood

Benefit
Oriented

Mission
Based

Shows
Sustainability

Timely

Compelling

Results
Oriented



Campaign Case Examples

Thinking Big About Campaign Objectives

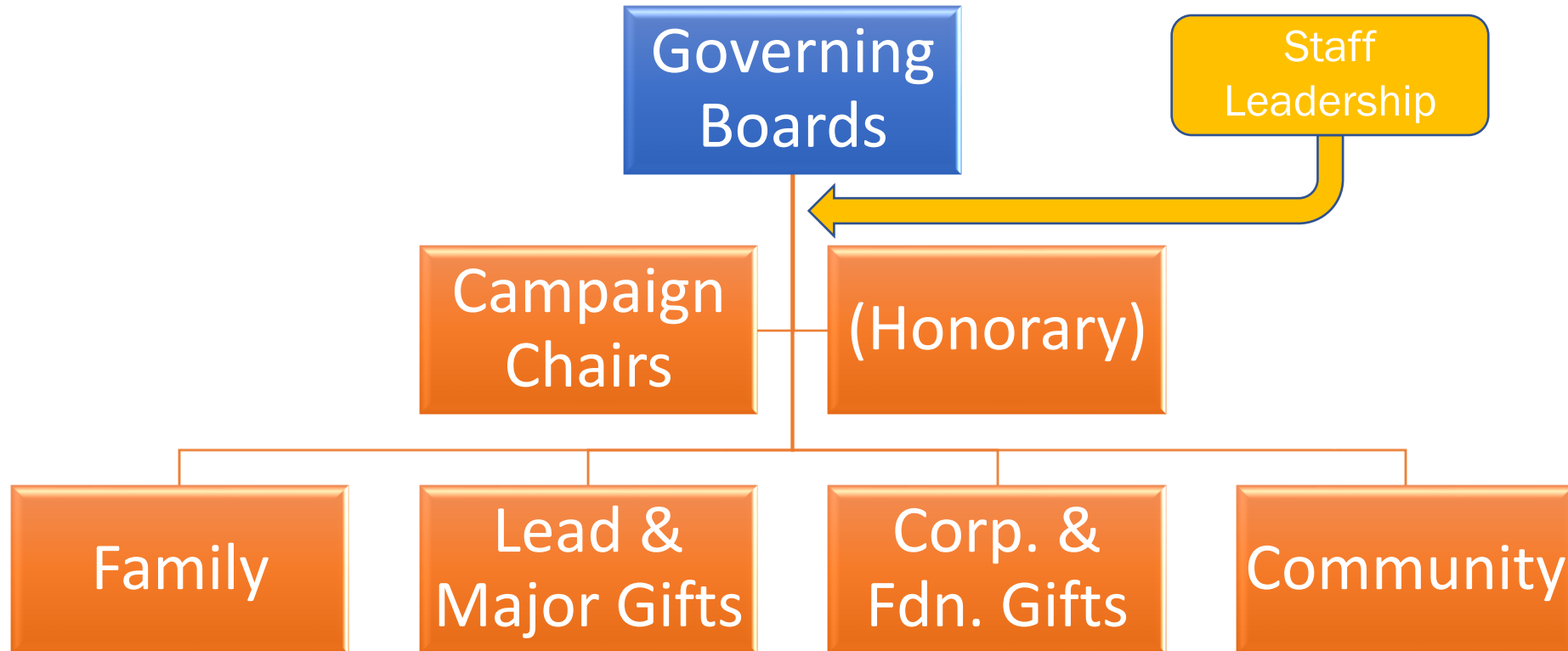
“The mind can be convinced, but the heart must be won.”

- Simon Sinek





#2 Leadership: Sample Campaign Org. Chart



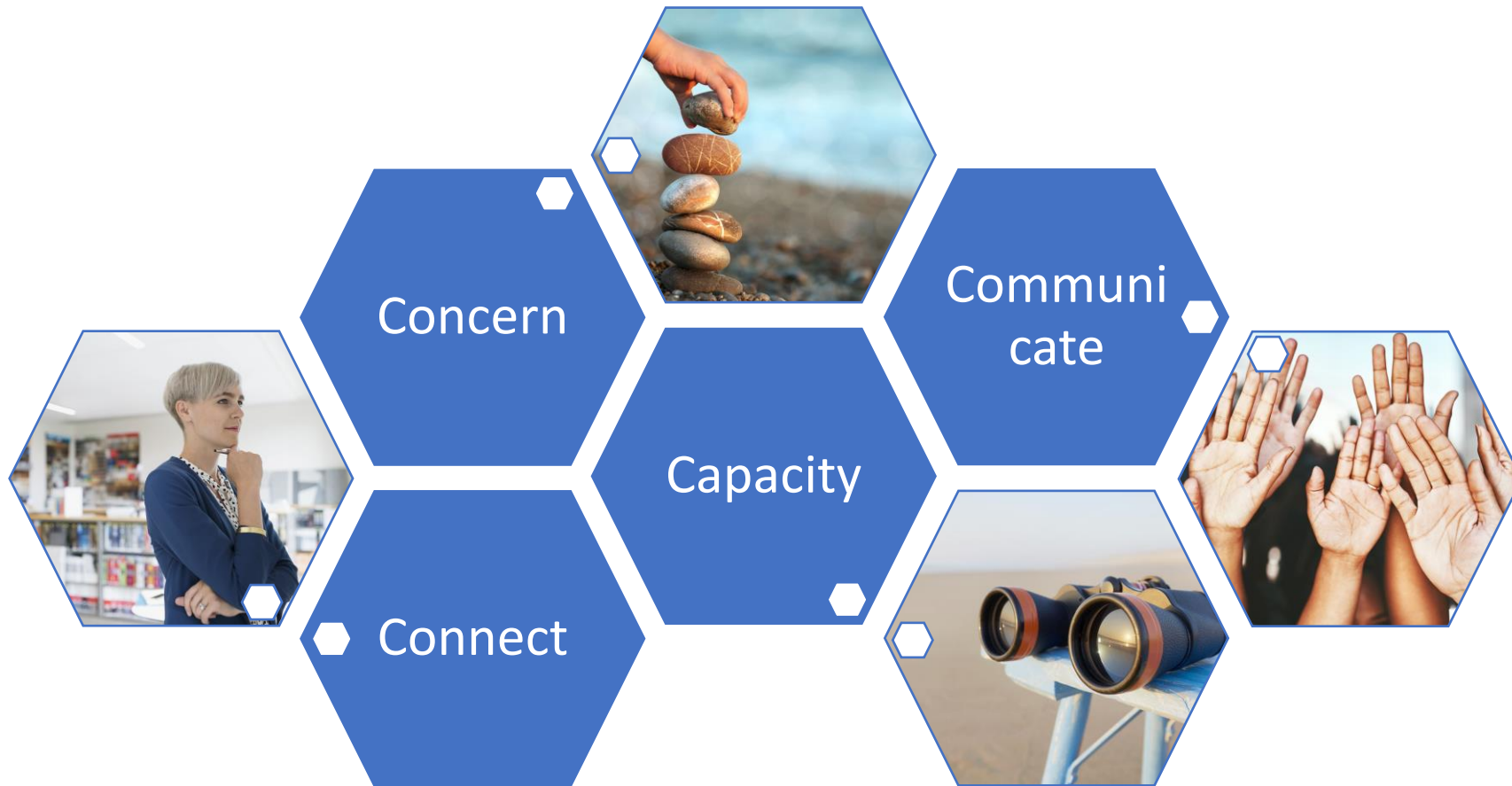


Leadership Enlistment Process



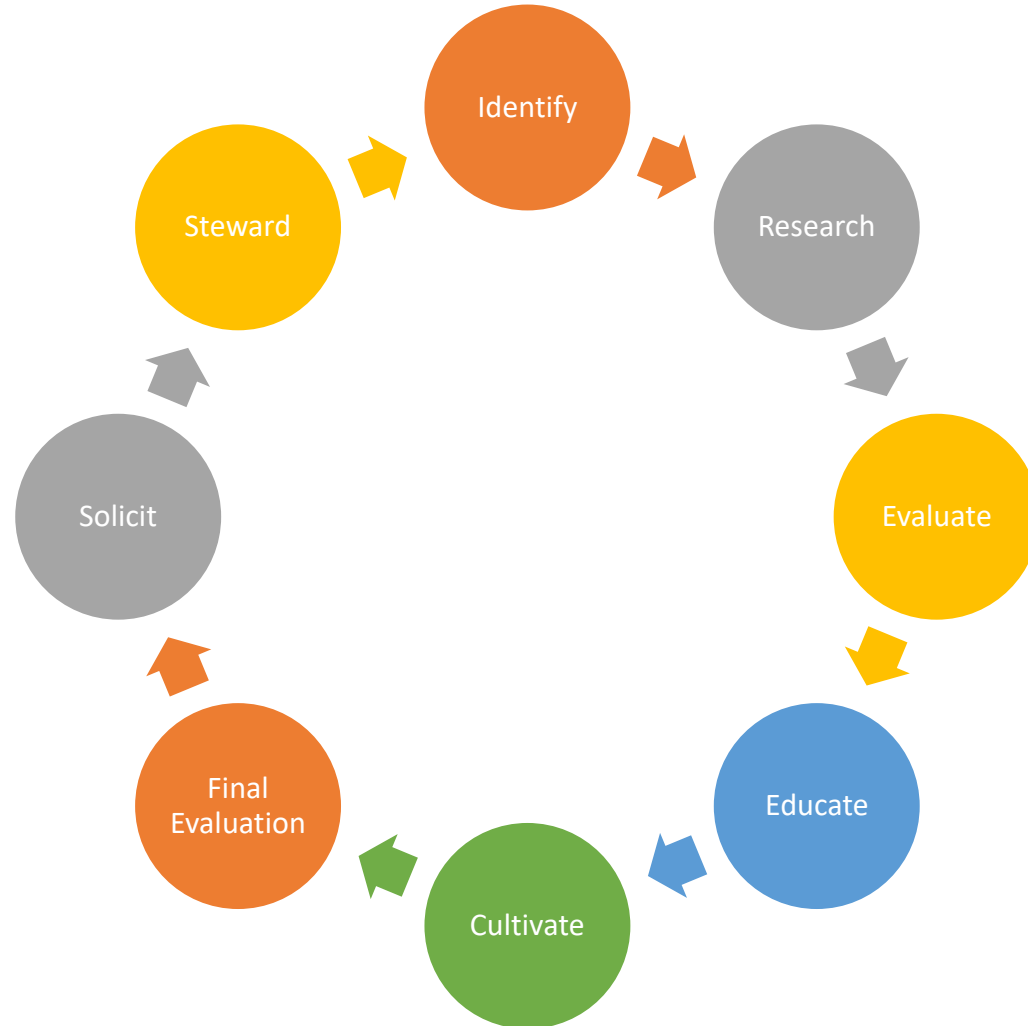


#3 Donors: Who Makes a Good Prospect?





Donor Relations Cycle





Example: \$5 Million Gift Chart





#4 Elements of Internal Capacity



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 7-10% 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



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



Next Steps?



Thank you

Q&A and Discussion