Understanding Special Project Campaigns

How to Create Fundraising Success

You are in the right place.
If a special project that requires you to raise financial resources is possibly in your future
You are currently in a campaign and stuck
You have raised grant dollars and need additional financial resources to finalize your project
If you want to enhance major gifts to a specific effort
Need to get staff and board on track for a special initiative
What you will discover...

1. The unique characteristics of a campaign
2. Typical mistakes made in campaigns and how to avoid them
3. Prerequisites for special project fundraising success
4. Effectively planning for a campaign
5. Roles and responsibilities in a campaign

What is a Special Project Campaign?

- Is interchangeable with the term "Capital Campaign."
- An intensive, organized fund-raising effort for specific capital needs or projects, executed within a specific time period, usually over one or more years.
- With this, organizations must be very strategic and systematic in their approach to implementing an effective campaign.
- The negative results from a failed campaign can be devastating with regard to your reputation, relationships with donors and the overall health of your organization.
Unique Characteristics of a Campaign

- **Inside Out**
  - All fundraising starts with the "Family" board, faculty/staff/others close to the family
  - Continues "insiders' support of the organization

- **Top Down**
  - Sequential Solicitation – Largest gifts are solicited first
  - Lead gifts set the standard for the whole campaign
  - Matching Gifts (1:1 or 2:1) are used as a strategy to enhance fundraising potential and ensure the success of the campaign

90% of the gifts come from...

10% of the donors.
Typical Mistakes
Organizations make in a special projects campaign.

Mistake 1 - They cast a wide net first.

The organization begins the campaign by going to the masses first, before securing larger gifts.

Reality – As mentioned, campaigns typically follow an inside out, top down approach. You will be unsuccessful in gaining support unless you have established significant momentum.
How to Avoid this Mistake

1. **Begin with family first**
   Board, staff and volunteers.

2. **Take an inventory**
   Identify existing donors who have capacity to give at a significant level and engage them first.

3. **Establish linkages**
   Use internal networks (board, staff and volunteer contacts) to determine additional donors who may have capacity to give at a significant level.

4. **Go BIG first**
   Work to gain the largest gifts first before casting your net.

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Mistake 2 - They fail to realize necessary commitment.

Organizations often underestimate the commitment necessary to effectively manage a successful campaign.

Reality – Key staff (Executive Directors, Development personnel managing the campaign) should expect to spend a minimum of 10-20 hours per month towards campaign efforts.

This is if you hire outside help to assist with campaign efforts.
How to Avoid this Mistake

1. Spend time planning out the efforts with key objectives, strategies and responsibilities

   DO NOT BE IMPATIENT AND BEGIN BEFORE YOU ARE READY!!!

2. Develop strength in numbers

   Establish a committee comprised of board members, staff, and volunteers to steer the effort and provide more human capital to be directed toward campaign efforts.

Mistake 3 - They are unrealistic.

Organizations can often times initiate a campaign effort without assessing whether the project is realistic from the perspective of:

- Attractiveness to potential donors
- Internal operations and buy-in from organization constituents and stakeholders
- Timing of the effort
- Want versus need
- Amount of $ to be raised

Reality – Just because it sounds great to you doesn’t mean everyone else will wrap their arms around it as well.

You have to adequately assess whether this will be a worthwhile project and also determine if you have the ability to raise the funds necessary to make the project a success.
How to Avoid this Mistake

1. Seek advice
   Ask your donors, staff and volunteers for their opinion.

2. Assess yourself
   Conduct an internal assessment to ensure you have the necessary foundation and capacity to manage a project of this magnitude.

Prerequisites for Success

How to ensure you are prepared to take this on.
1. The nonprofit must have a positive image.
2. The need for the special project must be well articulated.
3. The organization must have identified and nurtured positive relationships.
4. The nonprofit must attract strong volunteer leadership.
5. The philanthropic environment and timing must be right.
6. The campaign must be well organized and adequately staffed.
7. The board of directors must have a sufficient number of members who are influential in the community.

Prerequisites for Success
Before committing to any campaign, it is important for the organization to first conduct an assessment of its current capabilities:

Assess Internal Readiness
- Staffing and capacity
- Board strengths, weaknesses, and capacity
- Organizational structure
- Constituent communication
- Technological capabilities
- Development history
- Key policies and procedures

External Assessment
- Clarify public perception
- Refine project objectives
- Build a network of potential donors and volunteers
- Determine a reasonable, attainable goal
- Establish realistic time frame
Effective Planning
The elements of an effective campaign effort.

Capital Campaign Phases

1. Phase 1: Planning and Preparation
2. Phase 2: Silent Phase
3. Phase 3: Public Phase
4. Phase 4: Project Wrap
Phase 1: Planning and Preparation

During this phase, all applicable policies, procedures, and the overall general campaign management structure is established. This is considered an optimization stage where little to no results, in terms of monies raised, may occur, but it is the most crucial stage as the foundation for a successful campaign is established and implementation begins.

Phase 2: Silent Phase

In the Silent Phase, staff, the Campaign Committee and consultants will focus attention on the Solicitation of Family Gifts (those closest to the organization - Board of Directors, Campaign Committee, Staff and Volunteers). Additionally, focus will be placed on the solicitation of all lead and major gifts. This includes proposals to foundations, corporations and state/federal agencies.
Phase 3: Public Phase
Once 70% of the campaign goal has been pledged, the Public phase will be implemented. During this phase, focus is shifted from an individualized, intimate approach to a very public and external facing approach to fundraising. Lead and major gifts will be wrapped up and the solicitation of additional individuals, corporations and foundations will occur.

Phase 4: Project Wrap
This the final “clean-up” phase of the project where final dollars are pledges, final marketing and promotion efforts are conducted. Once 100% of the campaign goal has been raised, the project will be wrapped. During this phase, all donors and the general public are notified of the successful campaign.
Campaign Planning Road Map

A comprehensive guide to key campaign elements that ensure the successful completion of a special project campaign.

Project Overview
- Problem, purpose and impact of the project
- Funding objectives and budgets

Solicitation Process
- Process overview
- Gift Chart
- Naming opportunities and giving levels

Campaign Materials and Promotion
- Campaign presentation materials
- Awareness efforts

Giving Guidelines and Procedures
- Forms of giving and procedures
- Campaign guidelines and donor recognition

Roles and Responsibilities

Who is responsible for what.
Roles and Responsibilities in a Campaign

Members involved in the implementation of this plan will play a crucial role in the success of the campaign. Representatives will devote a disproportionate amount of effort towards the following defined roles in order to achieve outlined goals and objectives.

As a part of a campaign effort, all participating members should unanimously pledge:
- To make the campaign their philanthropic priority
- To commit their pledges at the beginning of the campaign
- To look for opportunities to educate others about the organization and the importance of this project to the community
- To submit names and contact information for potential prospects
- To understand the importance of confidential information in all aspects of the campaign
- To assist with individual cultivation and help solicit key prospects as needed

Board of Directors

The Board of Directors are a critical force behind the campaign effort.

- **Give**
  The Board will help lead the fundraising efforts by giving generously in proportion to their ability

- **Champion the Effort**
  The Board will stand behind the effort 100% and be an ambassador

- **Be Active**
  The Board will participate actively in the solicitation of gifts
Campaign Committee

The special projects campaign committee is commissioned by, and accountable to, the Board of Directors of the organization to assume primary responsibility in all matters pertaining to the capital campaign project. It will consist of a limited number (5-7) of volunteers.

- **Primary Purpose**
  To assist staff and committees in soliciting and identifying potential donors and implements activities outlined in the established campaign plan.

- **Ideal Members**
  Ideally people who have some experience in fundraising, especially capital campaigns, and who are strongly passionate about the project and the cause it serves. Committee volunteers will generate the ability, creative energy and socioeconomic clout to generate major gifts. Also, people within the community who have connections within affluent groups and the business community.

- **Membership Composition**
  Members of the campaign committee can be composed of Board Members and, as necessary, organization family and friends, business leaders, and other influential community members.

Campaign Chair

The Campaign Chair must be fully committed to the organization and the goals of the campaign. The chair serves as the public face of the campaign and a key position that drives volunteer efforts to generate contributions to the campaign.

- **Coordinate Campaign Committee Activities**
  The Campaign Chair is responsible for calling and running meetings of the Campaign Committee and reporting committee activities to the Board of Directors.

- **Execute the Campaign Plan**
  This position is responsible for executing the campaign plan in conjunction with staff, Campaign Committee and consultants.

- **Evaluate, Assign and Solicit**
  Listing and evaluating major prospects already known to the organization, identifying, rating and evaluating major new prospects, setting appointments with major prospects, and soliciting prospect donations.

- **Act as the Campaign Spokesperson**
  In conjunction with the Executive Director/Key Staff, and in consultation with the Campaign Committee and consultants, the Campaign Chair is the public spokesperson for the campaign, making statements in the media and urging participation on the part of the prospective donors.
Honorary Campaign Chair

The Honorary Chair is someone who is well known in the community and has a strong commitment to the success of the campaign. In many instances, the Honorary Chair is the stamp of approval for a campaign. The Honorary Chair is associated with individuals with influence and influence and generously uses these connections for the greater good. The Honorary chair can serve as a spokesperson for special events and other functions.

Key Expectations of the Honorary Chair

- Permit the use of his or her name on campaign materials
- Attend campaign committee meetings and campaign events whenever possible (no requirement)

Executive Director/Key Staff

The Executive Director/key staff serves as a key spokesperson of the for the campaign, in conjunction with the Campaign Chair. The Executive Director/key staff will also play a key role in the management and implementation of the campaign plan.

- Be the Chief Fundraiser
  Responsible for effectively working with the Campaign Committee and consultants in attending solicitation meetings, making contribution requests, and stewarding donors after a gift is made.

- Provide General Support
  Work with everyone to ensure adequate support in their role. Prepare informational materials for donor meeting. Utilize donor database to identify potential donors, serve as the primary point of contact for committee and consultants, etc...

- Oversee Campaign Administration
  Responsible for administrative activities of the campaign including, but not limited to, implementation of established gift acceptance and donor recognition policies and procedures, donor database management, campaign pledge record keeping/trackings.

- Additional...
  Work in conjunction with the Committee Chair to execute the campaign plan, evaluate, assign and solicit donors, be the campaign spokesperson.
In Conclusion

The key takeaways to consider when attempting your next special project campaign

1. Take your time and plan...Establish the foundation first
2. Ensure reality
3. Identify human capital and assign roles that fit
4. Start inward and work your way outward
5. Lastly...Have fun and make the campaign a wildly successful endeavor for you and your organization!