

The Quiet Phase and The Public Campaign

Integral Pieces for a Successful Campaign

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Crucial Steps to Capital Campaign Success



Campaign Timetable

- Campaign Progression

Quiet Phase

Kick-Off

Public Phase

Planning

Advance Gifts

General
Gifts

Follow
Through

Nucleus Fund

- Obtaining Gifts: Top Down, Inside Out DA C&C
- Board Gifts: Developing Goals
- Suggested Board Target: 20%-40% of CC Goal
- Self-Rating at Board Meeting
- Importance of Campaign Chair in Board Giving
- Soliciting Board Gifts

Nucleus Fund

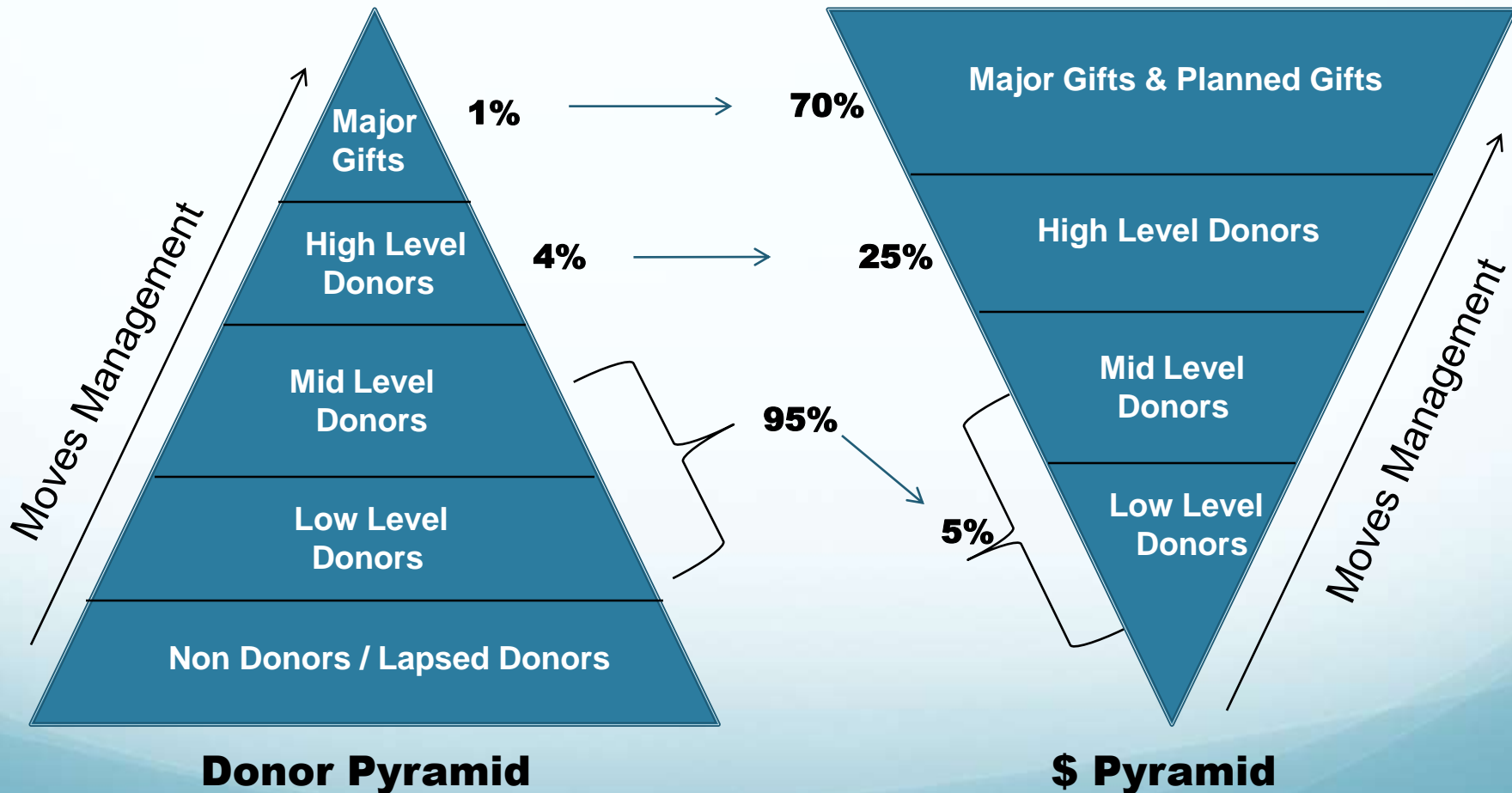
- Campaign Committee Gifts
- Staff Gifts - Importance of Percentage of Participation
Example: Preserving the Legacy Campaign,
Mercyhurst College 91%-\$600,000
- MSG-\$1,200,000
- The Top of the Giving Pyramid: Your top 10-15 gifts will make or break your campaign!

Sample Gift Range Chart

- Vilfredo Pareto Principle: 20% causes/80%Results
- From my experience CC's today are more like 10%/90% Results =10% of the donors make up 90% of your gifts. This is currently moving more towards 5% of donors making up 95% of CC goal.
- Bottom line: Lead and Major Gifts are vital to your success
- Use Your Gift Range Chart as Your Road Map

Donor and \$ Pyramids

5% of Donors = 95% of \$



Gift Range Calculator

Marc Pitman

www.GiftRangeCalculator.com

Target Amount:

GIFT RANGE	# GIFTS REQ.	# PROSPECTS REQ.	SUBTOTAL	CUMULATIVE TOTAL	CUMULATIVE %
0	0	0	0	0	0%
0	0	0	0	0	0%
0	0	0	0	0	0%
0	0	0	0	0	0%
0	0	0	0	0	0%
0	0	0	0	0	0%
0	0	0	0	0	0%
0	0	0	0	0	0%
0	0	0	0	0	0%
0	0	0	0	0	0%
0	0	0	0	0	0%
0	0	0	0	0	0%
Total:	0	0		0	

Gift Range Chart for \$1M Effort

CD 1-5 Gift Range Chart Worksheet

Example: Gifts Needed to Raise
\$1,000,000

\$ Amount	Number of Gifts	Number of Prospects	\$ In Range	Cumulative \$	% of Goal
\$150,000	1	2	\$150,000	\$150,000	15%
\$75,000	1	2	\$75,000	\$225,000	22%
\$50,000	2	6	\$100,000	\$325,000	32%
\$25,000	6	18	\$150,000	\$475,000	47%
\$10,000	10	32	\$100,000	\$575,000	57%
\$5,000	20	80	\$100,000	\$675,000	67%
\$2,500	40	160	\$100,000	\$775,000	77%
\$1,000	80	360	\$80,000	\$855,000	87%
\$500	160	640	\$80,000	\$935,000	93%
<\$500	300+/-	1,000	\$65,000	\$1,000,000	100%

Total Number of Gifts:
620+/-

Walking Through the Gift Range Chart: Lead Gifts

Amount of Gift	Number of Gifts	Number of Prospects	Number of Solicitors	Amount Solicited in Gift Range	Percent of Total
\$150,000	1	2		\$150,000	
\$75,000	1	2		\$75,000	
\$50,000	2	6		\$100,000	
\$25,000	6	18		\$150,000	
Total	10	28		\$475,000	47%

The Niagara Falls Effect



Nucleus Fund Part 2: Lead Gifts

- Lead Gift Committee
- Getting the Order Right
- Lead Gift Solicitation Material
- Example: Mercyhurst College-Board of Trustees 100%-
\$9,000,000

Audrey Hirt Academic Center



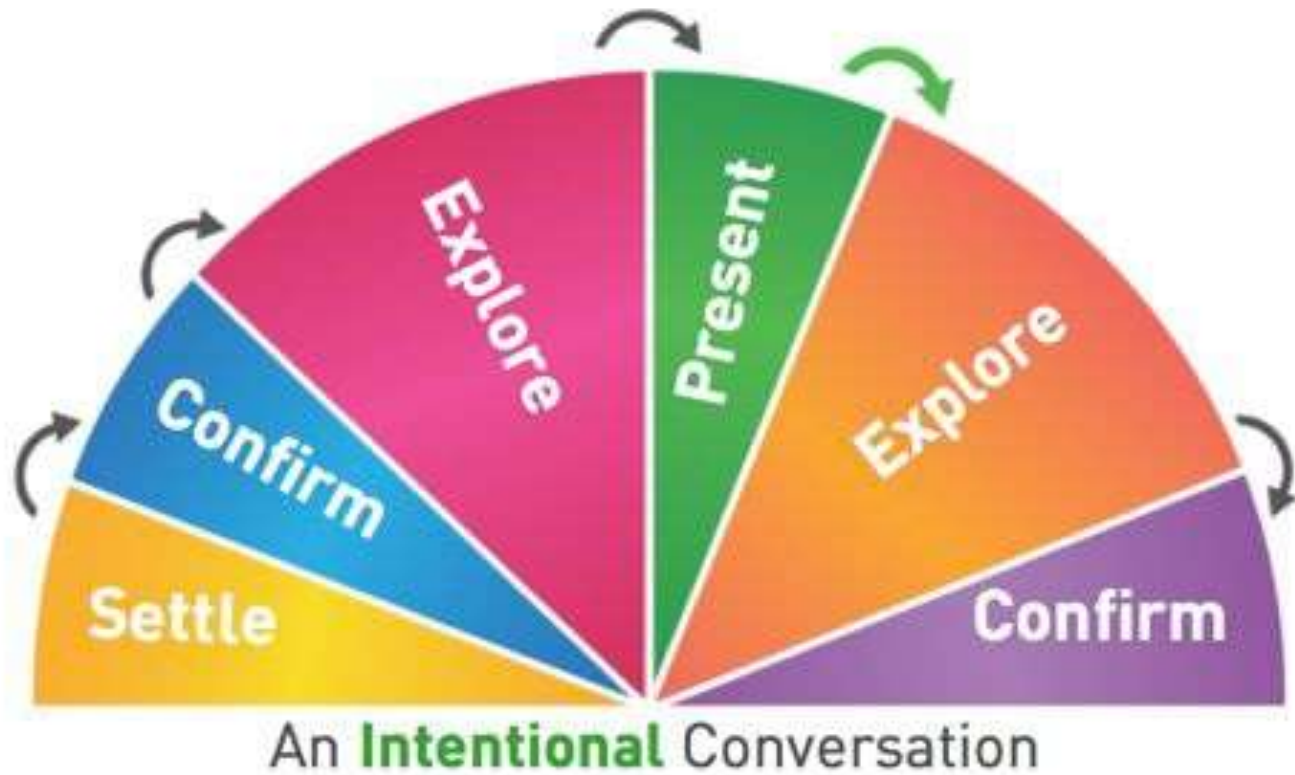
Audrey Hirt Academic Center



Nucleus Fund

- Build Confidence by Sharing Progress and Capturing Momentum
- Campaign Progress Report, Print, SM, PR, Internal Newsletter
- Materials for Solicitors - The Solicitation Process: Step by Step
- Setting up the Appointment
- Letter of Intent
- Call Reports

An Intentional Conversation



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Nucleus Fund

- Preparation
- How Not to Solicit Gifts
- Practicing Making the CASE
- Solicitation
- Follow-Through

Nucleus Fund

- Having the Solicitation Conversation
- Opening
- Dialog Importance of Listening
- Presentation “Would you consider a gift of.....”
- Close
- Follow Through

Nucleus Fund

- Soliciting in Teams
- Lead Gifts from Other Sources
- Donor Advised Funds (DAFs)
- Foundations
- Corporations
- Strategic Giving: Power of Leverage
- Example: Bob Miller 1M Challenge MNE

Nucleus Fund

- Keeping Track of Progress
- Prospect Pipeline Chart - Keep your eye on your target!
- Ongoing Cultivation and Solicitation Meetings

Nucleus Fund

- The Power of Lead-Gift Fundraising
- Examples: Dr. Barrett and Catherine Walker, George and Mary D'Angelo M.D., Anonymous Donors, Pat Black



Inspirational Asking Experiences

- David vs. Goliath – March 2001
- The modest, soft-spoken librarian who carried a big philanthropic stick



Alumna Gift Takes Campaign Over \$20 Million Mark

In the 65 years following her graduation from Mercyhurst College, Frances Malaney didn't forget her alma mater.



Frances C. Malaney '38
PROVIDED BY YALE UNIVERSITY

The Yale catalog librarian made Mercyhurst College a beneficiary of her TIAA-CREF retirement fund. Upon her death in mid-February 2003 her gift was valued at nearly \$350,000. As an unrestricted gift, the college has designated the Frances C. Malaney

Endowed Scholarship for the students at Mercyhurst North East and the

Campaign Kickoff



The Campaign Kickoff Event

- Should attain 50%-70% of your goal before your public announcement
- Announce the dollar goal of the campaign
- Recognize generous donors and other individuals
- Articulate the case for support in a compelling fashion
- Announce the campaign's progress
- Announce the next steps

The Public Campaign

- Preparing for the Public Phase
- Preparing Campaign Materials
- Enlisting Volunteer Solicitors
- The Special Events Committee

The Public Phase

- Clarify Goals, Objectives and Tasks
- Develop a Realistic Budget and Adhere to it
- Involve Volunteers and Board Members
- Attend to Details!!
- Using Your Event to Cultivate Prospective Donors
- Media and Campaign Message
- Soliciting Major Gifts after the Kickoff

The Public Phase

- System for Managing Many Solicitations
- Enlisting and Soliciting the Solicitors
- Matching Prospects with Solicitors
- The Two-Meeting Solicitation Process
- Preparing Proposal Letters
- Training the Solicitors
- Maintaining Contact During the Solicitation Process

The Public Phase

- Completing the Process
- Job Description for Major-Gift Volunteers
- Solicitor Training
- Fear of the Ask
- Solicitor Training Workshops
- Soliciting the Broad Base by Phone
- Telephone Solicitation and the Capital Campaign

The Public Phase

- Volunteers vs. Paid Solicitors
- Organizing the Volunteer Phonathon
- Recruiting Volunteers
- Determining the Duration
- Setting Dates and Times
- Finding a Suitable Location
- Sending a Pre-Phonathon Mail Appeal

The Public Phase

- Preparing Supporting Materials
- Motivating Volunteers
- Following Through
- Reporting Results

Michele and Tom Ridge Health and Safety Building



Direct Mail and Web Solicitations

- Reaching Closure with Major Donors
- Mail Campaign to Complete the Campaign
- Refocusing the Case for Support for the End of the Campaign
- Segmenting Your Mailing List
- Celebrate Success with a Last Chance Appeal
- Welcome Relief After a Stressful Campaign!!

Bukowski's Vital Data Points

“Bukowski -isms”

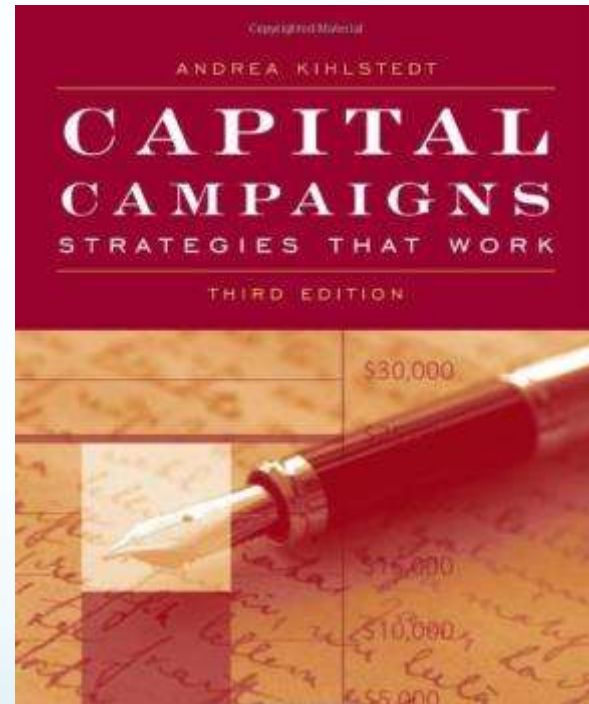
- Timeline - Stay the Course
- Focus...Focus...Focus
- Total Commitment at Hand: Passion – Intensity
- Momentum and Leverage – Powerful Tools in CC
- The longer a successful CC continues the harder it is to stop!
- You are building your future through your CC
- Avoid the Neutron Bomb Effect

Goals of a Capital Campaign

Bill McGoldrick, Washburn & McGoldrick

- Exceed your financial goal
- Strengthen your infrastructure and build campus support for the fundraising process
- Create an enthusiastic, educated cadre of volunteers
- Increase institutional unity and morale
- Enhance your institution's external reputation

Special Guest Andrea Kihlstedt



Questions?



Recommended Resources

- Kihlstedt, Andrea, *Capital Campaigns That Work, Strategies that Work*, 3rd ed., Sudbury, MA, Jones and Bartlett, 2009.
- Kihlstedt, Andrea, *How to Raise \$1 Million (or more!) in 10 Bite-Sized Steps*, Medfield, MA, Emerson & Church, 2010.
- Dove, Kent E., *Conducting a Successful Capital Campaign*, 2nd ed., San Francisco, Jossey-Bass, 2000.
- Wyman, Ken, CFRE (Consultant Trainer, and Professor Post-Graduate Fundraising and Volunteer Management, Humber College, Toronto), *Face to Face: How to Get Bigger Donations from Very Generous People*, 1993.

Recommended Resources

- Eisenstein, Amy, *Major Gift Fundraising for Small Shops: How to Leverage Your Annual Fund in Only Five Hours per Week*, Rancho Santa Margarita, CA, Charity Channel Press, 2014.
- Capital Campaign Magic: <http://capitalcampaignmagic.com/>.
- Capital Campaign Magic: <http://capitalcampaignmagic.com/how-to-run-successful-capital-campaigns-amy-eisenstein-.gail-perry/>

Recommended Resources

- Asking Matters: Brian Saber www.AskingMatters.com.
- Gladwell, Malcolm, *The Tipping Point: How Little Things Make a Big Difference*, Bay Back Books, New York, 2002.
- Panas, Jerold, *Asking: A 59-Minute Guide to Everything Board Members, Volunteers, and Staff Must Know to Secure the Gift*, Revised Edition, Medford, MA, Emerson & Church, 2013.
- Sturtevant, William T., *The Artful Journey: Cultivating and Soliciting the Major Gift*, Chicago, Bonus Books, Inc., 1997.

Success, Wrap-up, Planning for Your Next Campaign

