The Nonprofit Academy PRESENTS!

T OP 10 L ESSONS L EARNED FROM 30 Y EARS ON THE C APITAL C AMPAIGN T RAIL

with Eric Rolfson

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Ten Key Lessons From the Campaign Trail

Nonprofit Academy
November 14, 2017
Today’s Presentation

1. Campaigns must be about mission, vision, & brand—not money!
2. The Board has critical Advancement responsibilities
3. Make it your prospect’s vision, too
4. Ignore the fundraising “science” at your peril
5. Plan the work; work the plan
6. Build campaign leadership one person at a time
7. Focus 90% of time on engagement; only 10% on solicitation
8. Allot time & resources mercilessly
9. Establish donor base & hone internal systems before campaign
10. Success is about relationships, passion, & commitment
1. Begin with Mission & Vision for the Future

- Mission
- Strategic Planning
- Resulting Resource Needs
- Compelling Story
- Branding / Messaging
- Fundraising

- Prospect Identification
- Stewardship
- Cultivation
- Solicitation
2. Critical Board Advancement* Responsibilities

Advancement’s Objective:
Engage prospective donors, match their interests and passions with strategic priorities, and encourage long-term investment in your institution’s future.

Board Responsibilities:
• Do Strategic Planning & Identify Resource Needs
• Serve as advocates/champions in wider community
• Make cause a personal philanthropic priority
• Participate in the fundraising cycle
• Welcome evaluation & strengthening of Board

* Advancement = Friend-raising, fundraising, & related marketing & communication activities
3. Make it Your Prospect’s Vision, too

- Fundraising is a process; not an event
- Interest, Involvement, and only then, Investment
- ID critical prospective donors
- Devise ways to engage them as the vision is evolving
  - Planning; case statement; goal setting; targeted activities
- Discover prospective donors’ passions and use them to further engagement
- Invite input and incorporate feedback
  - Draft case statement, for example
4. Ignore Fundraising “Science” at Your Peril

- 90% of total will come from 10% of gifts
- The Rule of Thirds:
  - One third of total from top 10 gifts
  - Another third from next 100 gifts
  - Final third from rest
- Boards ideally pledge 20% and help raise 20% of goal
- Go public only when 50% - 70% is pledged
- Spend 90% of time engaging; only 10% soliciting
- Volunteer solicitors will usually “get” what they give
- $390 billion donated to U.S. charities in 2016:
  - Corporations      5%
  - Foundations       15%
  - Individuals       80% (8% by bequest)
5. Plan the Work and Work the Plan: *Silent Phase*

- Consider internal readiness assessment & feasibility study
- ID & cultivate leadership donors
- Secure commitments from Board, staff and key volunteers
- Establish internal processes and counting rules
- Draft case statement and naming opportunities
- Determine campaign divisions
- Launch leadership gifts effort
- Test & establish goal
- Establish budget
- ID and recruit volunteer leadership
- Train all board members and volunteers
5. Plan the Work and Work the Plan: *Readiness Assessment*

- Is there an adequate fundraising history and base of support?
- Is the Board supportive of and ready for a campaign?
- Do the goals reflect the strategic plan?
- Can you tell your story? Is your brand compelling?
- Are adequate professional & support staff resources and a campaign budget in place?
- If not, is there a willingness & ability to invest more?
- Is staff leadership well respected & ready to commit the time?
- Is the database up to the job?
- Are marketing & communications strategies in place?
- Are gift policies & procedures in place?
5. Plan the Work and Work the Plan: *Feasibility Study*

What you will learn if you choose to interview 40-50 key, cultivated donors and prospective donors:

- Institution’s perceived strengths and weaknesses
- The impact of your case statement
- Which goals resonate and which do not
- Whether this campaign will be a personal priority for key individuals
- What s/he feels about the mission & leadership
- Whom s/he knows who might make a major gift
- Recommended approach to these individuals / entities -- Will s/he help?
- Whether s/he would be willing to take a leadership / volunteer role
- Whether the overall dollar goal is realistic and achievable

Final report usually recommends a dollar goal (or range); identifies potential leaders, and suggests timetable and budget.
5. Plan the Work and Work the Plan: *Public Phase*

- Announce **only** when 50 – 70% is pledged
- Broaden outreach; expand communications; engage community
- Launch “Special,” “General,” and other divisional efforts
- Not only about fundraising, but Public Relations
- Opportunity to expand profile from a position of strength
- Realized vision and follow-through raises reputation
- Success is a platform for next level of friend- & fund-raising
6. Build the Leadership Team One Person at a Time

• Start at the Top – Recruit Campaign Chair or Co-chairs
• Agree on the various divisions
• Help Chair build her team
• Develop a strong campaign cabinet
• Consider, when recruiting, why people give time & money:
  • Belief in a mission
  • Belief in the leadership
  • Association with peers
  • To make a difference
  • To give back
  • Because they are asked
  • To be part of a winning team
• Choose division leaders who can make leadership commitments and are known and respected in the community
7. Spend 90% of Your Time on Engagement

- Steven Covey:
  “People like to feel heard and understood before being comfortable giving their full attention and trust to someone.”
- Importance of strategy sheets
- Cultivation of specific interests
- Stewardship for past giving
- Interaction with peers
- Depth on the bench – increase # of institutional relationships
- Open-ended questions: Nothing builds relationships better than two-way communication
8. Allot Time Mercilessly

- Major Gifts fundraising is **not** a democratic process
- Determine to spend 60% of leader’s time on cultivation, solicitation, & stewardship of key qualified prospects
- Protect your leader’s time – and your own
- Laser focus staff & volunteer time, resources, & expectations
- Establish face-to-face goals for frontline fundraising staff with “qualified” prospects
- Create & track contact reports
- Utilize “Moves Management”
9. Establish Donor Base & Internal Systems First

- Best future donors are often past donors
- Develop comprehensive stewardship plan
- View philanthropy as a continuum
- Shore up annual fund, especially leadership components
- Continue to strengthen board and create other engagement opportunities for principal & major prospects
- Document gift acceptance & campaign counting policies
- Address “gaps” & issues identified by Readiness Assessment
10: Success = Relationships, Planning, Passion & Commitment

- Lead
- Plan
- Advocate
- Communicate
- Be creative
- Be comfortable
- Enjoy the process!
Q & A
and Contact Information

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“Fund raising has been a part of the American landscape since the birth of our nation. Thousands of colleges, hospitals, museums and human service programs have come into being because individuals have cared enough to go out and ask. If you find your enthusiasm ebbing, remember, as a participant you are in the fine company of sincere, dedicated, and optimistic people everywhere who are willing to work tirelessly for a better world. Not many can say the same.”

David Lansdowne, *Fundraising Realities Every Board Member Must Face*
Learn to reach your fundraising goals faster!

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