

Campaign Readiness

Monthly Webinar Series

JANUARY 2024



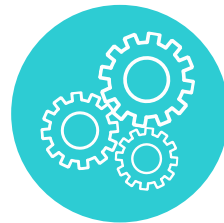


The Purpose Of Our Time Together



Asking Pre-Campaign Questions

Informing immediate next steps.



Elements of a Successful Campaign

Case, Leadership, Prospects, & Plan.



Major Giving for Years to Come

Reach the campaign goal AND elevate a culture of major giving.

ABOUT CCS

CCS Fundraising, founded in 1947, is a strategic consulting firm that partners with nonprofits for transformational change.



Leading experts in campaign and development strategy



Experienced across nonprofit sectors and locations



Full-time professional staff plans, implements, and manages fundraising projects

ABOUT ME



Aashika Patel
Executive Vice President
CCS Fundraising

Serves as executive counsel &
lead strategist in Southern
California and Southwest
Region

12+ years of fundraising
expertise

Collaborates with a diverse
portfolio of clients across all
nonprofit sectors


Operates as a thought and
action partner and focuses on
fundraising solutions that build
consensus, leverage data, and
are sustainable for
management




PRE-CAMPAIGN ACTIVITIES

Campaign Readiness Guiding Questions


You should be able to answer these questions prior to starting a campaign.

- 


1
GOAL & TIMING

How much is needed for an organization to evolve into the next chapter of its mission work? What is the right goal for the campaign? How should the campaign be phased on a timeline?
- 


2
CASE

What is the need for greater funding? What core messages and priorities will inspire existing and new supporters? What will be the impact of significant philanthropic investment?
- 

3
LEADERSHIP

How can your organization leverage current, and gain new, volunteer leadership to champion the case? What are the opportunities for volunteers to invite more people to support your organization's mission?
- 

4
PROSPECTS

How robust is the pipeline of potential supporters? What is the profile of a top prospect? Do you have enough prospects to successful reach goal?
- 

5
INFRASTRUCTURE

What resources and support will the organization need to accelerate its fundraising activity in a campaign setting? How do you begin? Where do you start and where will next steps lead?

Pre-campaign Planning Essentials

Assess organizational readiness to conduct a campaign

Gauge attitudes and reactions to your organization and plans

Craft a compelling case statement

Identify campaign leadership and top prospects

Determine interviewee's interest and volunteer/financial support

Determine if proposed goal is realistic/feasible

Identify obstacles to success

Develop campaign plan, timetable, and financial goal

Design donor recognition plan

Plan initial solicitations

Goal Setting Considerations



Comprehensive or standalone?



Challenging yet achievable



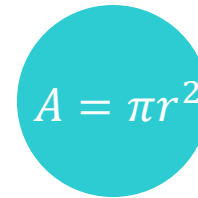
It is about the need, but not the need alone



Not dependent on one lead gift or a handful of gift indications



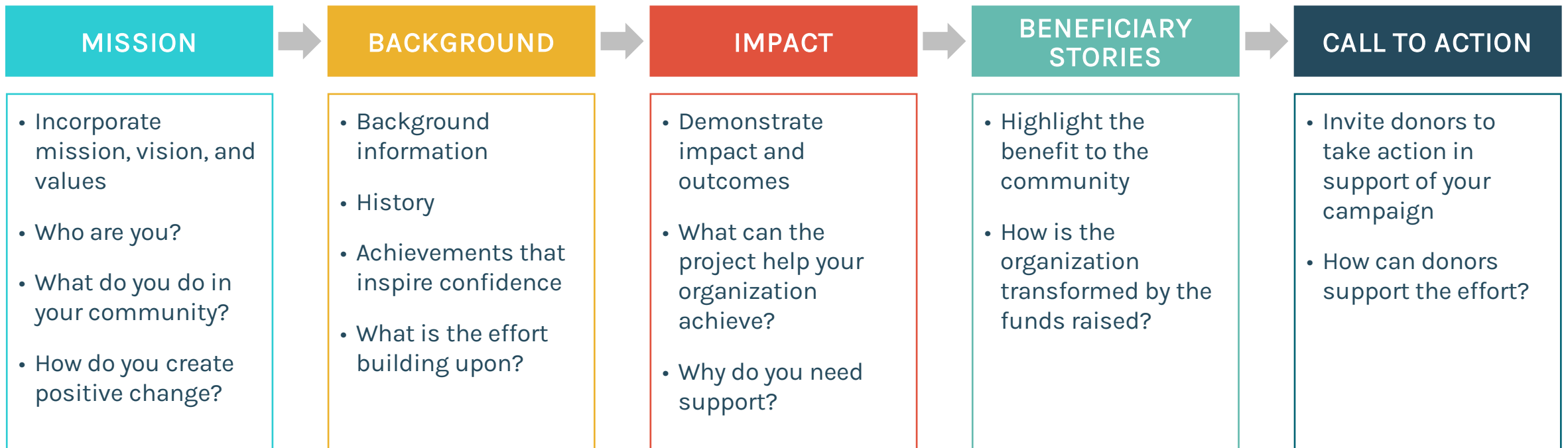
Requires data analysis



Not a mathematic equation

Develop A Compelling Case

- 1 Develop a compelling theme that embodies your organization's priorities.
- 2 Test and refine your case with donor feedback.
- 3 Personalize your message based on constituent affiliation and donor behaviors.

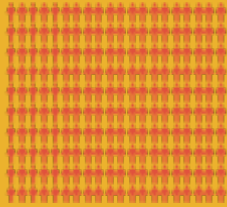


Tools for Identifying MG Prospects

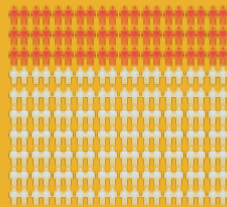
Wealth screening, predictive modeling and RFM analysis can help identify your best prospects

PREDICTIVE MODELING

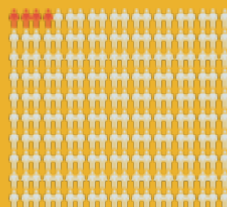
Forecasts future giving behavior



Full donor database:
10,000 constituents



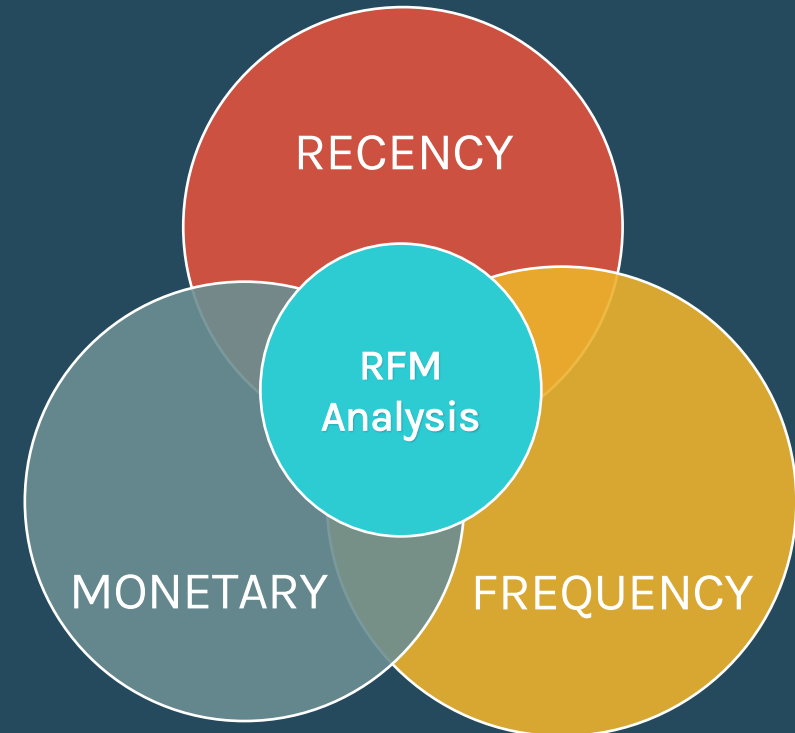
Apply multiple filters:
4,000 constituents



Add additional criteria:
250 constituents

RFM ANALYSIS

Segment donors based on giving



Role of a Volunteer Leader



ADVOCATE

Respected community leader and strong communicator



DONOR

A generous stakeholder who is personally philanthropic



PARTNER

Collaborative and passionate about the mission



CONNECTOR

Has access and is willing to make introductions to potential supporters



RESOURCE

Has an inspiring personal story



STEWARD

Can commit time to maintaining relationships

Sample Timeline and Activity Tracker

Create a plan

- Personal goal
- Portfolio of prospects
- Available time

Set goals and benchmarks

- Activity goals
- Measurable and quantifiable
- Financial goals
 - Need and potential
 - Table of gifts

Determine timing and pace of activity

- Prospect readiness
- Solicitation dates

Regularly analyze progress and results – and adjust!

Donor Strategy Builder				
	Discovery	Cultivate	Brief	Ask
Action to be taken				
The meeting setup				
Who will be involved				
Materials to be developed				
Follow-up plan				
Completion date				



ELEMENTS OF A SUCCESSFUL CAMPAIGN

Arc of A Successful Campaign



The study and campaign planning stages consist of several key activities:



Draft and test a suite of materials and messaging that excites and draws in a philanthropic audience.



Screen and segment the donor base to prioritize activity and identify new prospects.



Instill ownership and knowledge in a cadre of donors and leaders who will likely provide the bedrock support to launch the campaign.

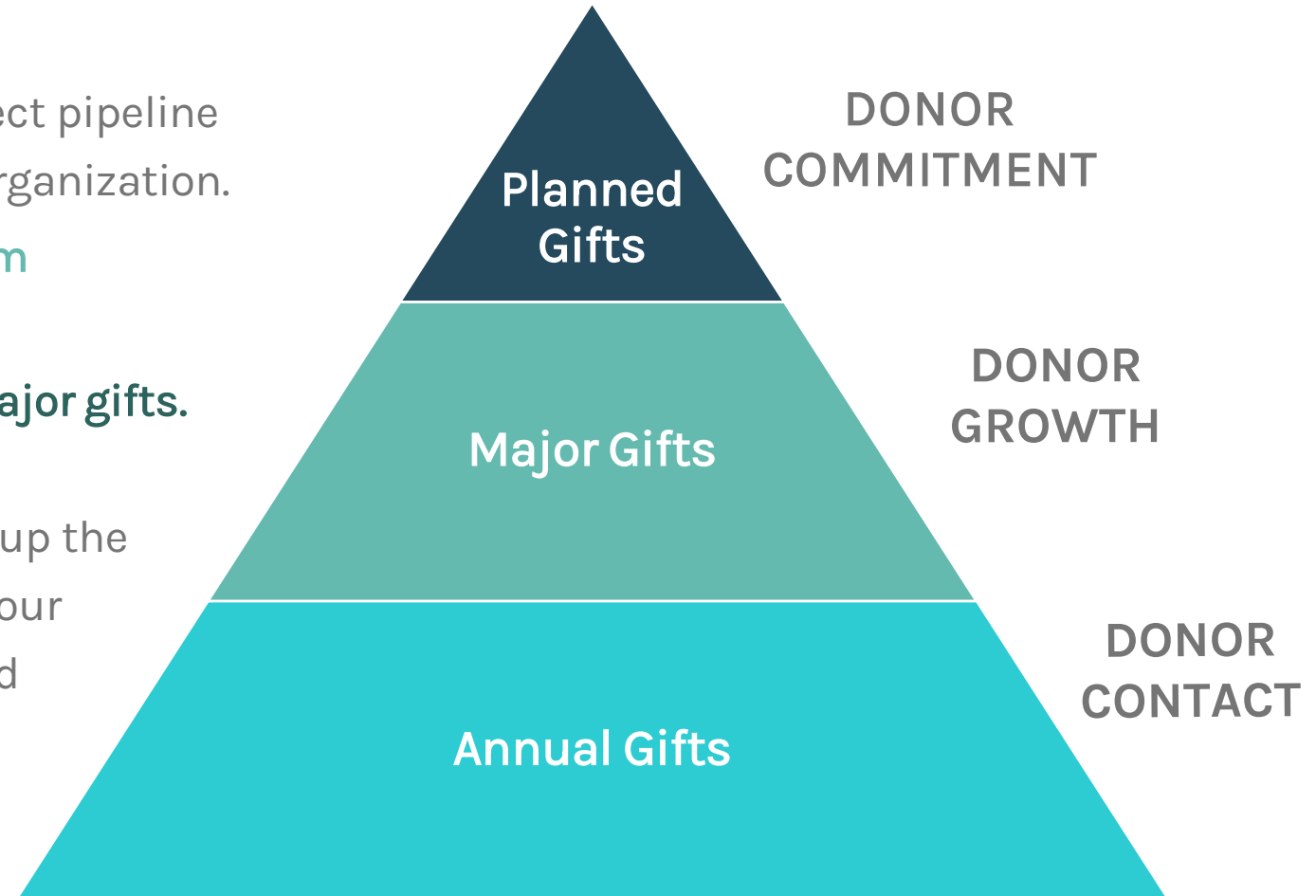
Balanced Fundraising Model

A balanced philanthropy program and prospect pipeline should meet the fundraising needs of your organization.

10% - 30% of secured funds should come from renewable gifts, or the Annual Fund.

70% - 90% should come from deferred and major gifts.

Where appropriate, donors should be moved up the pyramid throughout their relationship with your organization to deepen their engagement and increase their giving.



Fundraising Objectives



- Bring new donors to your donor base or re-acquire lapsed donors
- Generally more expensive than renewal or upgrading

- Secure gifts from existing donors
- Helps to stabilize your donor base

- Increase gift amounts from existing donors
- Moves donors through the donor lifecycle



ELEVATING A MAJOR GIFTS PROGRAM

Defining Major Gifts

By Dollar Amount

Varies widely by organization, ranging from \$5,000 to \$1 million+

By Method

A strategically cultivated and personally solicited gift, often paid over several years, not timed to the calendar

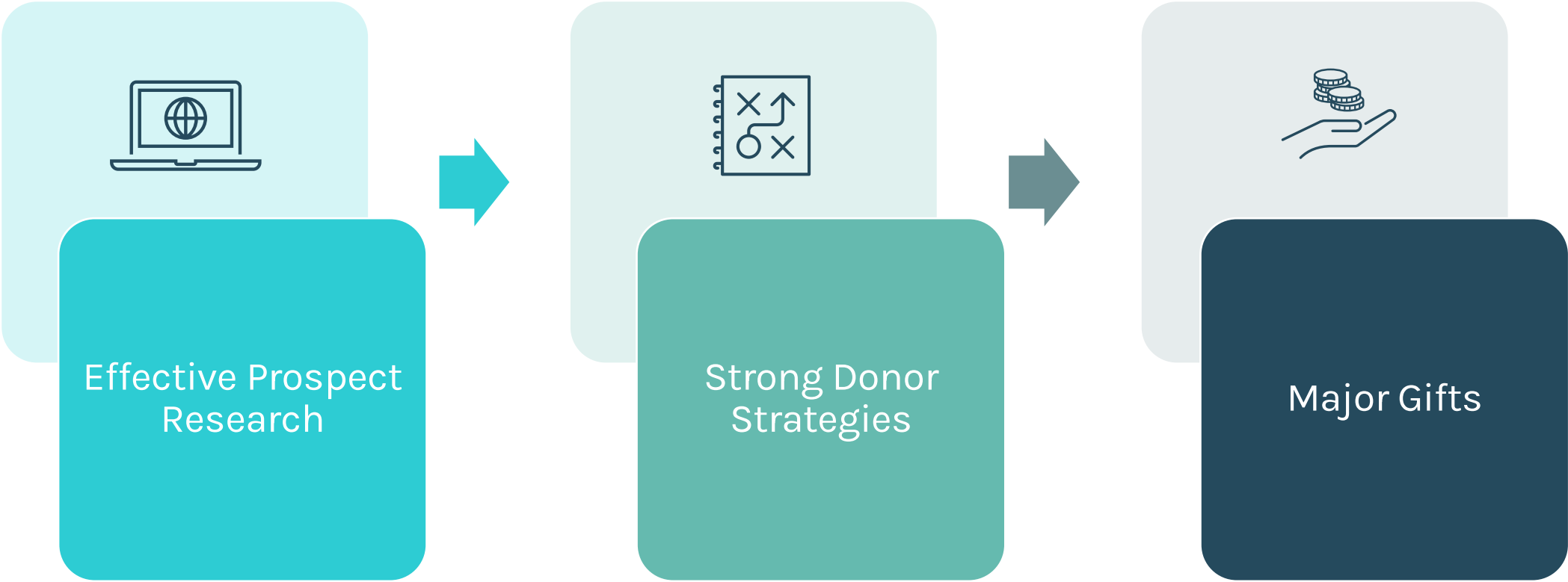
By Donor

From one of the organization's top prospects

By Impact

A gift that makes a difference to the organization, which may be restricted to a special area or project

Conduct Effective Prospect Research



Donor Engagement Strategy

Identify key data points to build an individual engagement strategy over a set timeframe.

1

Gift Target: What gift amount are we asking for? For what area/program?

2

Solicitor(s): Who is making the ask?

3

Timing: When will the ask take place?

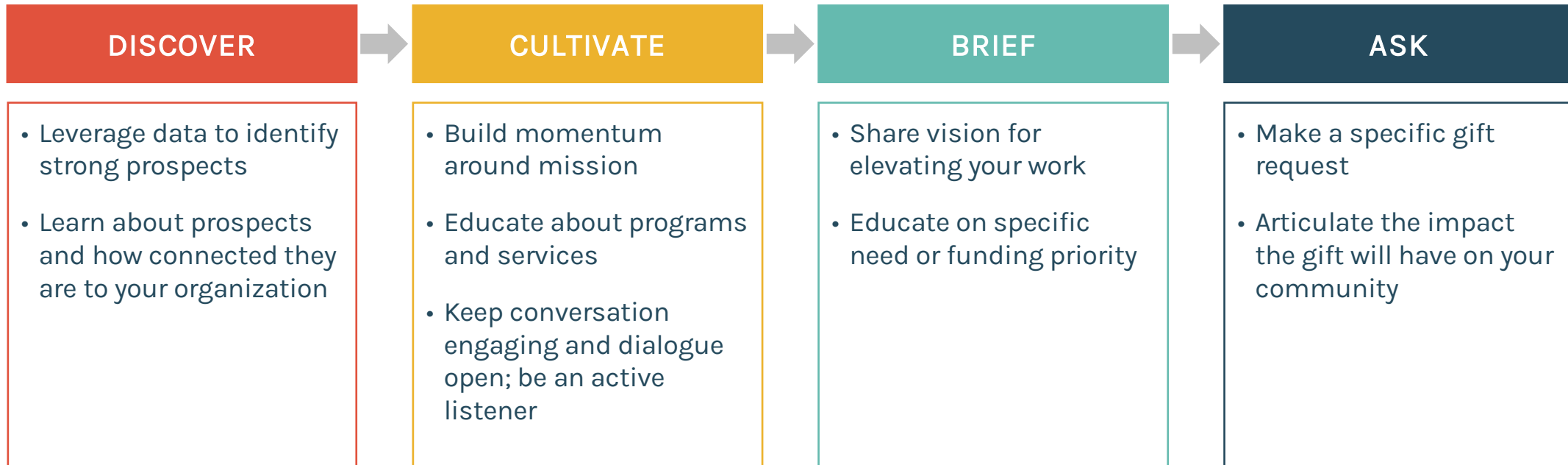
4

Materials: What materials are needed to be successful?

5

What's Next: What is the stewardship and recognition plan?

Drive Prospect Activity to Secure Major Gifts



STEWARD

REMINDER
Work Backwards!

Establish Values-Aligned Recognition

Thank & Acknowledge
Top Annual Fund Gifts



Consider Recognition
Opportunities to Honor Top Donors



Make Visits or Calls to
Thank Top Donors



Organize Events to Thank Donors
& Deepen Relationships



Five Tips to Prepare for a Successful Campaign

1

Leverage the feasibility study to collect data and inform planning

2

Understand all you can about your donors

3

Engage campaign and volunteer leadership early and often

4

Focus on what you can control and move forward

5

Maintain positivity



THANK YOU!

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