



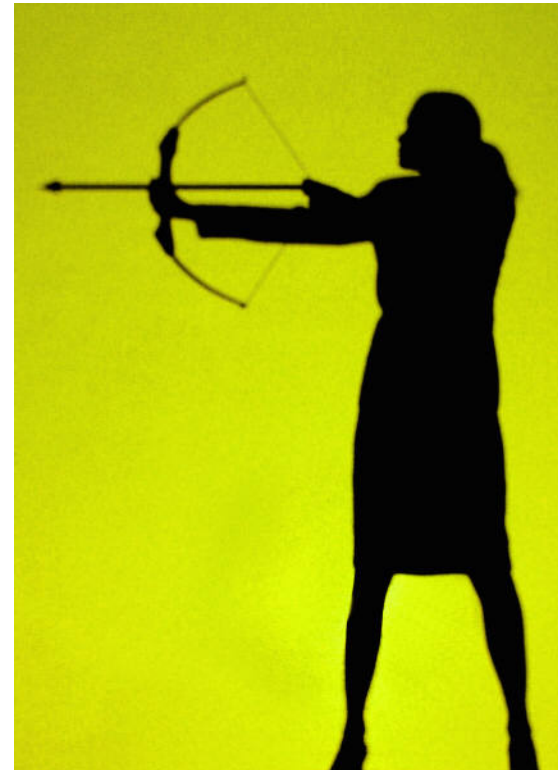
Campaign Creation: From Conception to Implementation

Kelly Frost
Vice President
CCS

AFP-NNE Conference
November 3, 2011
Manchester, New Hampshire

Agenda

- Planning for Campaign Success
- Value of a Planning Study
- Refining Your Case
- Building Institutional Support
- Discussion



Planning for Campaign Success

- Assess the fundraising potential
- Broaden the base of support
- Communicate priority of funding needs
- Identify and cultivate current and potential leaders and donors
- Build on success
- Determine level of support from constituent groups
- Determine willingness of participants to give, lead and advocate
- Inform the campaign's fundraising plan, timing, and initial leadership and organizational structure

What Is a Planning Study?

1. WHAT?

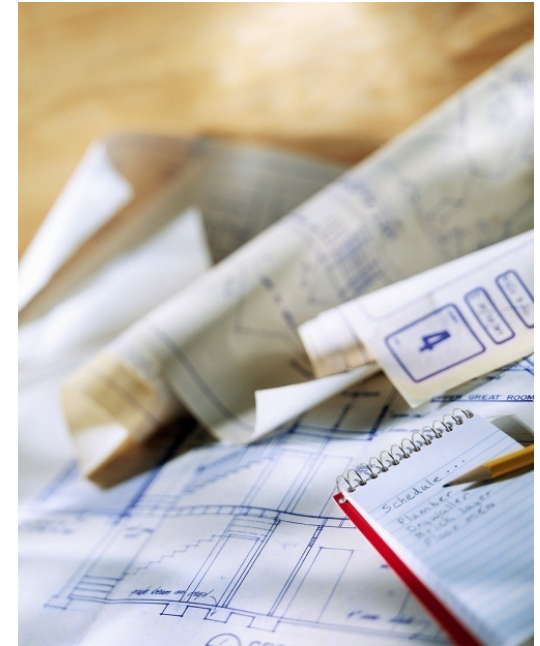
- A road map for your fundraising campaign or program
- Looks at an organization's assets:
 - Case for support
 - Potential donors
 - Volunteer and staff resources
 - Fundraising programs
 - Budget
- Given these assets, make thoughtful judgments about:
 - Fundraising strategies most likely to be productive
 - Priorities for new or enhanced fundraising activities
 - Additional investment that may be needed
 - Staff and resources
 - A realistic plan and budget



Why Should You Conduct a Planning Study?

2. WHY?

- Necessitates an articulation of the organization's plans, needs, and goals for the future, which ensures that key leadership, development staff, and board are on the same page
- It provides an opportunity to communicate the strategic goals of the organization, cultivate donor engagement, solicit their thoughtful feedback, and assess fundraising potential
- Guides the development of goals, timelines, plans, and resources needed to achieve them



Who Should Be Involved?

3. WHO?

- Planning for a successful study requires the active participation of decision makers and those who will likely serve the campaign:
 - Board Leadership
 - Leading Benefactors
 - Executive Director
 - Director of Development
- Buy in and ownership at all levels is important
- Even if outside counsel is hired to guide the process, it is important for staff and volunteer leadership to remain invested



Who Should Be Involved?

3. WHO?

- Study participants should include a mixture of constituents, particularly those who you hope will provide leadership to the effort:
 - Board Leadership
 - Leading Benefactors
 - High Net Worth Prospects
 - Influential Opinion Makers
- Interviews conducted by outside counsel allows participants to be forthcoming with both positive and constructive feedback
- Informed & disinterested assessment of study findings enhances decision making



When Should You Conduct Your Study?

4. WHEN?

- In coordination with your organization's overall strategic planning process
- If circumstances have changed dramatically
 - New ED or DOD
 - Loss or vulnerability of major funding source
 - Demographic or economic shift
 - Change in need



How to use the Study when creating the Plan

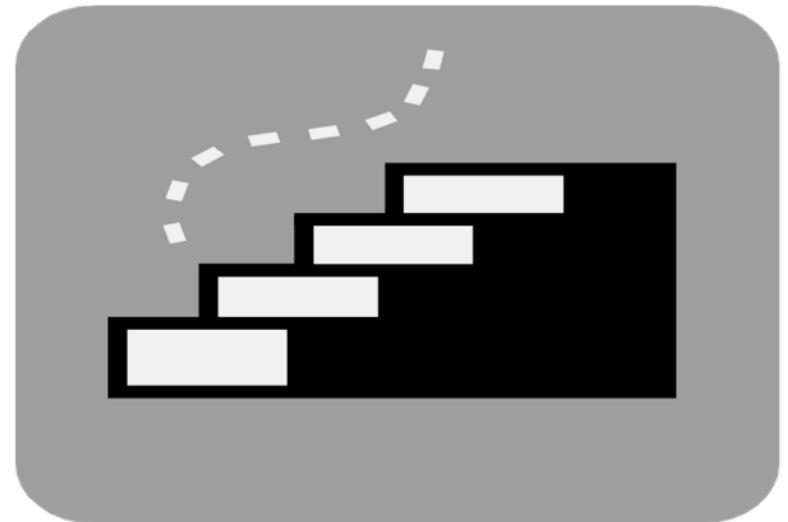
5. HOW?

- Use constituent feedback to guide the identification of a variety of funding options
- Analyze feedback to
 - Strengthen Case
 - Identify Volunteer Leadership
 - Expand Major Donor Prospect List
 - Guide development of the Plan
- Use the planning process as a cultivation opportunity



Four Steps of the Planning Process

1. Analyze Current Situation
2. Identify Fundraising Opportunities
3. Establish Goals
4. Assemble Plan



1. Analyze Current Situation

- Conduct a review of current programs and operations
 - Overall results
 - Program growth and progress against goals
 - Fundraising by source and method — program balance
 - Costs of fundraising
 - Peer analysis and reviews
 - Consider retaining third-party professionals to gather donor feedback

2. Identify Fundraising Opportunities

Current/Potential Donors

- Individuals
 - Board
 - Volunteers
 - Donors and friends
 - Constituents
 - Public
- Corporations
- Foundations
- Other

Fundraising Vehicles

- Planned giving
- Major gifts (personal solicitation)
- Annual giving programs
 - Direct Response
 - Events
 - Sponsorship
- Corporate and Foundation relations
- Campaign

3. Establish Goals

- Consult your organization's strategic plan; the overall plan should drive the fundraising plan
- Review both program need and fundraising potential
- Identify annual goals for the life of the plan
 - Monetary goals
 - Activity goals
 - Operational goals



4. Assemble the Plan

- Strive for balanced fundraising
- Invest in needed resources - don't chase progress
- Recognize and map your potential for growth
- Outline priority goals
- Read other plans
- Talk to peers
- Consider outside counsel



Elements of a Solid Plan

1. Review of Study findings and recommendations
2. Strategic goals and objectives
3. Operational priorities
4. Case for support
5. Potential and current donors
6. Fundraising strategies
7. Board and volunteer involvement
8. Communication
9. Budgeting and staffing
10. Next Steps



Board and Staff Roles

Key Tasks	Board Member Role	Development Staff Role
New Names	Provide Names Review Names	Research and Circulate Share New Donors
Initiate Contact	Make Call	Provide Script
Introduce	Attend Host	Coordinate Provide Background
Solicit	Accompany	Prepare Materials
Steward	Stay Engaged	Keep Informed Send Mailings and Updates

Maximizing the Impact of the Fundraising Plan

- Use the plan to create focus and generate activity
 - Set aggressive but achievable benchmark goals
 - Communicate success to inspire excitement & enhance donor enthusiasm and generosity
- Share the plan with prospective donors
- Use the plan to develop short-term work plans (30- /60- /90-day priorities) and a timeline or calendar
- Make adjustments to the plan as needed to keep it relevant
- Don't let the plan gather dust! Review and consult the plan often



Summary

1. Gather information to analyze your current fundraising capacity (Consider a Planning Study)
2. Use findings to develop:
 - Case
 - Leadership
 - Prospects
 - Plan
3. Make Planning an Inclusive Process
4. Use your Plan to Drive Activity
5. Revisit and Revise your Plan Regularly



Thank You!



Fundraising • Development Services • Strategic Consulting

Kelly Frost
Vice President
CCS

kfrost@ccsfundraising.com

207-991-1932

www.ccsfundraising.com



[*facebook.com/ccsfundraising*](https://facebook.com/ccsfundraising)



[*twitter.com/CCSFundraising*](https://twitter.com/CCSFundraising)