



The New Campaign
Strategies for Success

-Or- Everything Old is New Again?

OAIS Development Cohort
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The New Campaign

- The allure of *glitzy, shinny, new and easy!*
- Independent Schools are unique
- Define: *New*
- Define: *Campaign*





Independent Schools are Unique

- Defined/closed constituency
 - Parents & grandparents may be primary donors, rather than student/alumni
- Limited appeal to Corps/Foundation
 - *...are we for the betterment of man-kind?*
- No one gives away money
 - What is the exchange of values?
 - What does your school offer its donors?



What is New?

- The first campaign: 1905
 - Stanford: 1960 PACE
- Two schools emerge
 - Charles Sumner Ward (YMCA – Whirlwind)
 - Bishop William Lawrence (Harvard)
- Disagree on method & approach
- Agree on large gifts & outstanding volunteer leadership

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Define: Campaign

- An intensive fundraising campaign can be defined as an *effort* to:
 - Raise a specific amount of money,
 - For a specific purpose,
 - Over a specific period of time.
- Military metaphor
 - Operate through personal influence and persuasion
- The volunteer
 - Volunteers give more than non-volunteers

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An Art and a Science

- The science of campaigns:
 - Series of steps taken according to schedule
 - Based on goal, estimate number of gifts, prospects, and volunteers
- The art of campaigns:
 - A unique challenge in working with people, especially those as volunteers
 - Affect performance through their own convictions, desires, aspirations

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Lead Gift First

- Myrna Hall (M&L) says, "an institution shouldn't put the shovel in the ground until it has identified and raised the money through outright philanthropy rather than deferred gifts." After all, she says, "When contractors want to be paid, you can't wait for Mr. Smith to pass away."
- "We do not go public with the announcement of a new building until the lead gift is tied up in a nice bow," Kevin Heaney (OSU Fndn) says.
- It's a strategic move institutions are beginning to make. According to the "CASE Campaign Report 2013," released in June of this year, more than one-third of campaign managers raised 41 percent to 60 percent of the total goal during the quiet phase of the campaign.



Volunteers paired with professionals

- "Asking volunteers to open doors to potential donors is not new," says Thomas Young, VP for Institutional Advancement at Gustavus Adolphus College. "Our success was due to the new partnership between teams of volunteers and our major gift officers."
- Young organized a team of volunteers for each of his five major gift officers. A key to success was giving the volunteers direct access to the college's professional fundraisers. "Whether [the volunteers] wanted to visit independently, or have a gift officer accompany them and even make the ask, we gave them whatever they needed and they connected us to people who made a big difference in our campaign."



A fine-tuned message

- Major donors want to know that their gifts have an impact. This desire was expressed by 74 percent of respondents to the "2012 Bank of America Study of High Net Worth."
- "You've got to tell them what difference it will make if they give the gift and why it is important now," says Hall, of Marts & Lundy. "Ask academic deans and vice presidents to define the gap—what will be sacrificed if you don't have that money?"
- Instead of telling donors that you need a new building, Hall recommends explaining exactly what will happen in that building. "Describe the 80 or so new students you won't accept into the program if you don't have additional facilities," she says.



Access to the president
(Head-of-School)

- Presidents play a key role in developing relationships with major donors. "I see administrators who can make a campaign sing with success through their active participation," says Hall.
- Big galas and recognition ceremonies don't get the bang for the buck they used to. "Rather than having their picture taken with the president at a gala, donors prefer to meet one-on-one over coffee."
- Top donors at Wheaton College and Spartanburg Methodist College receive presidential access on a more low-key basis. "There's still an air of frugality in the marketplace, and flashy parties can be a turn-off," "Making donors feel part of the 'inner circle' works better."

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An informed internal audience

- Heaney says the increased amount of attention his office has given to communication with OSU's internal community has had a major impact on building understanding of the campaign process and objectives.
- "There's been so much misunderstanding about why some projects are green-lighted and others aren't," he says. "By communicating how our objectives are chosen, what they are and why we honor the requests of our donors, we build powerful support internally that carries over to enhance the way we present ourselves to the public."

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Capital vs Comprehensive Campaigns

- Modern Fundraising, The Next Big Thing is Already Here:
 - Andrew Shafer, VP for Advancement at Aquinas College – Nashville TN
- "The best campaigns are those that are based on a sophisticated and thoroughly developed strategic plan that outlines the funding priorities most critical at that time."

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Use Volunteer Time Efficiently

- “Previously, campaigns were volunteer-led. Campaigns have now shifted to being staff-driven and volunteer-assisted. The main driver of this change is a lack of time that volunteers can dedicate to campaigns. To maximize volunteers’ time, the organizational staff should direct the campaign plan and timetable, while volunteer leadership should be used to assist with solicitation strategy, influence and to gain access to donors at the top of the gift pyramid and solicit those gifts as part of a solicitation team.”
- Frank Pisch, The Compass Group



Test Your Knowledge

What Makes a Winner?

- To resolve major issues relating to finance and governance, your CEO and governing board must be involved. True False
- A capital campaign is basically another way for an organization to increase its revenues and reduce its expenses. True False



Test Your Knowledge

What Makes a Winner?

- A compelling case for support shows how a successful campaign will meet the needs of the organization. True False
- Most prospective donors *want* to know how much others would like to see them give. True False
- The general chairperson should be enlisted as early in the campaign as possible. True False



Test Your Knowledge
What Makes a Winner?

6. The easiest way to raise \$6 million is to ask 1,000 people to give \$6,000 each. True False

7. The financial commitments of your top prospects will be greatly influenced by the level of support your "institutional family" provides. True False

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Bonus Questions:

Name the two YMCA Executives at the turn of the century who are credited with revolutionizing the techniques of "capital" fundraising?

What was the nickname for this YMCA method of campaigning?

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