



# Campaign Readiness and Planning: *Laying the Groundwork*

Michelle Buchanan, CFRE  
Principal, *Dini Spheris*

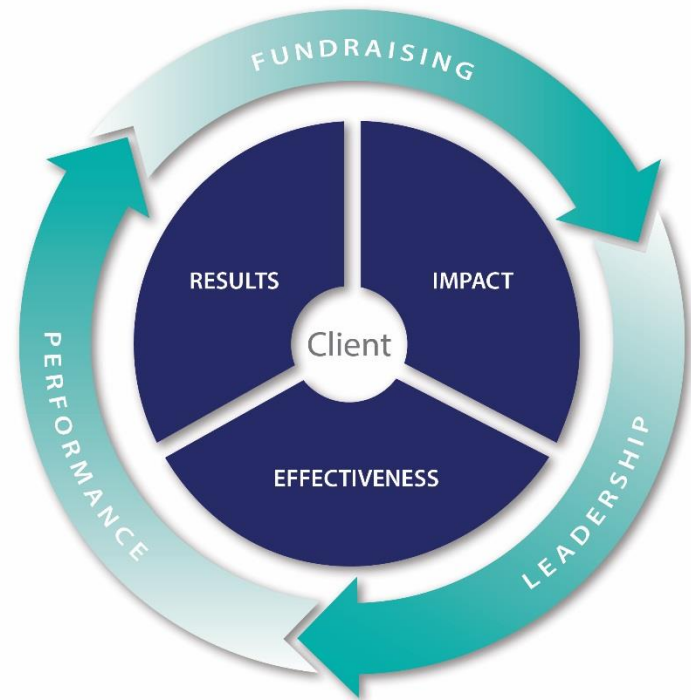
August 1, 2019



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# Dini Spheris

- Deep, nationwide knowledge of fundraising, leadership and performance across philanthropic sectors
- Forward-thinking, trusted partners in solutions and success
- Client-centered, holistic approach to service delivery
- Willingness to think outside the box of traditional fundraising
- Customized solutions for your institution today and where you desire to be
- As employee-owners, we treat each client's project and challenge as our own



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# Topics for Discussion

- Keys to Campaign Success
  - Case
  - Leadership
  - Infrastructure
  - Prospects
  - Timing
- Prospect Discovery and Positioning



# Keys to Campaign Success

- **Case** – Clear and transparent objectives, budgets, and goals
- **Leadership** – Influence and affluence
- **Prospects** – Ready and willing to make significant major gifts
- **Infrastructure** – Strategic, disciplined, and intentional planning



# A Successful Case for Support...

- Grabs a prospective donor's attention
- Shows that there is a clear problem/need
- Appeals to multiple donor “faces” – e.g., rational and emotional
- Uses statistics, research, and other validation



# A Successful Case for Support...

- Offers a solid reason for investing in a program
  - Features and benefits
  - Impact, not needs
  - Your organization's "competitive edge"
- Involves gathering input from many sources



# Components of the Case

- Overarching theme
- Internal “master” case (e.g., white paper)
- Internal and external case statements (e.g., brochures)
- Elements that can be customized (e.g., program inserts, partners list, naming opportunities)



# Leadership: *Role of the CEO / ED*

- Face of the campaign
- Cultivating and soliciting top prospects
- Spending a significant percentage of time on campaign related activities

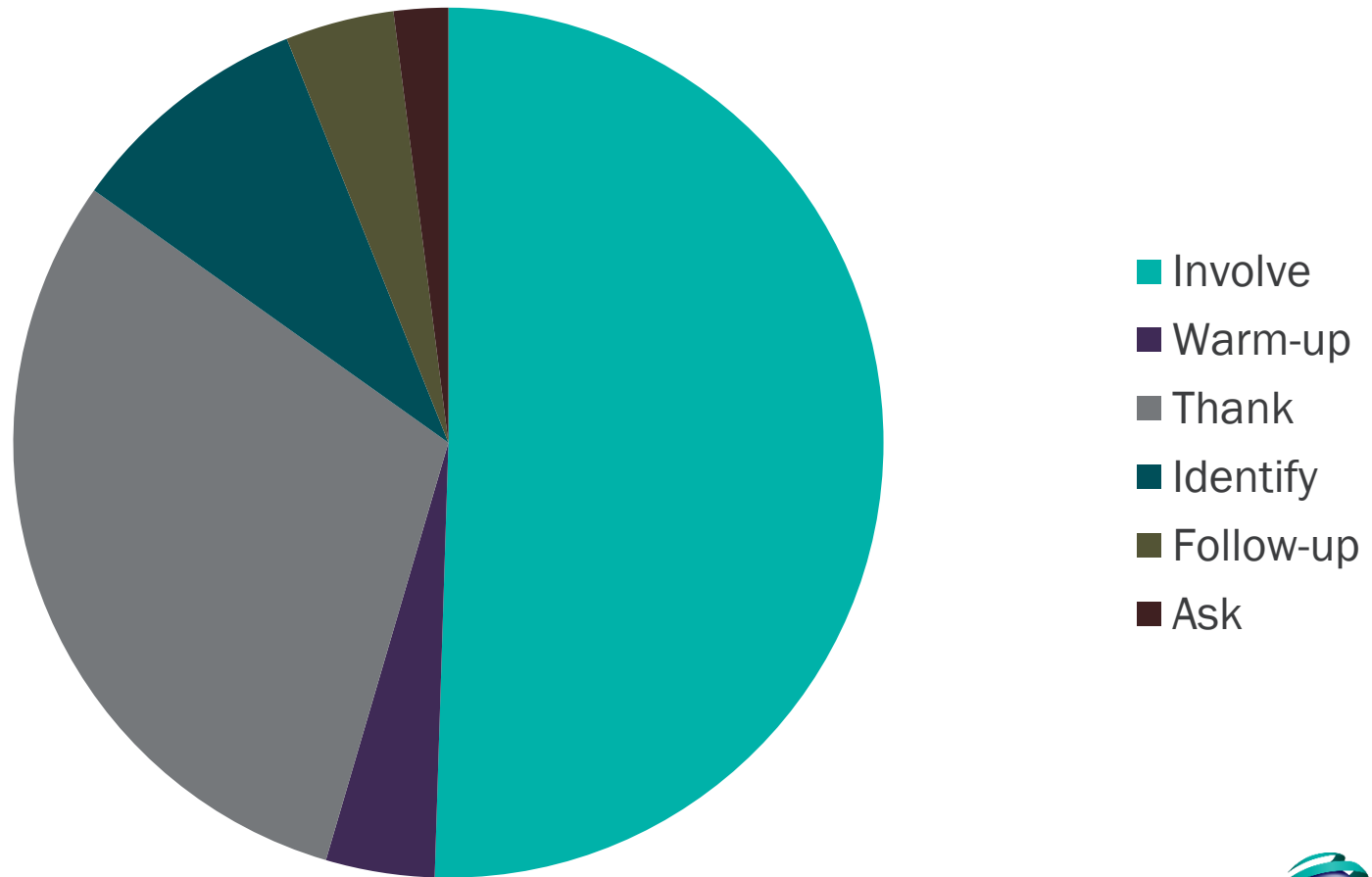


# Leadership: *Role of the Board*

- Formally approve goal(s)
- Willing to utilize their own personal connections
- Stay informed, keep us focused, keep us accountable
- Monitor progress and have shared ownership in campaign success

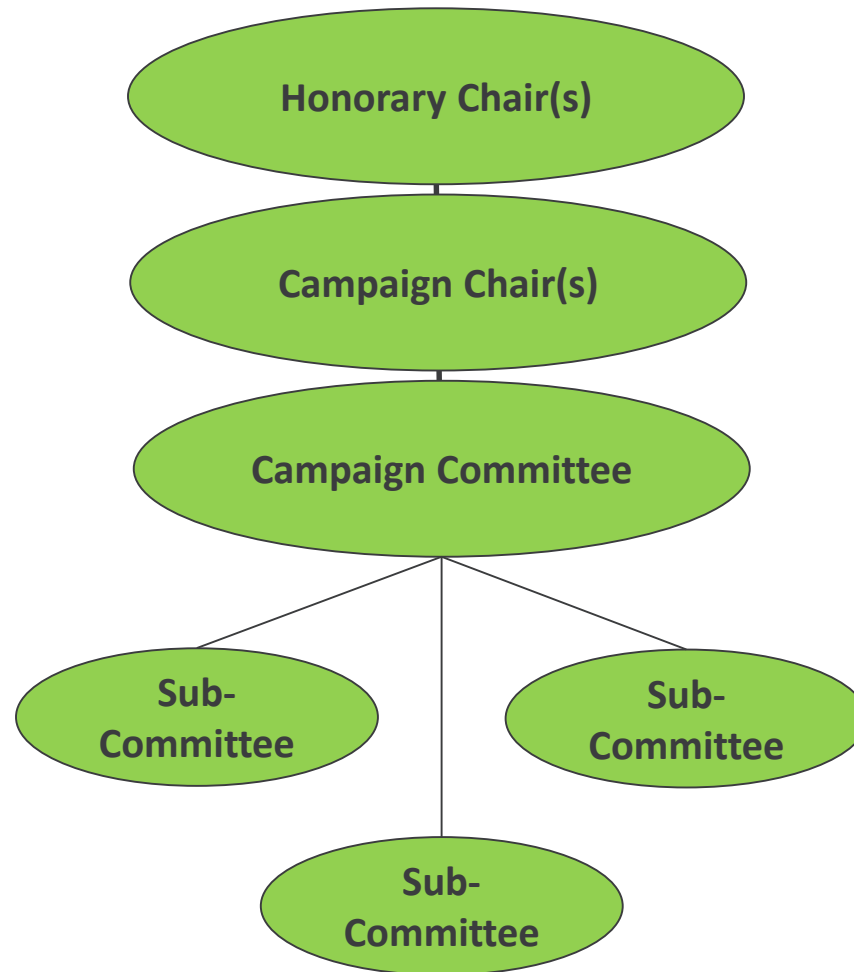


# A Role for Every Board Member



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# Determining Your Structure



# Infrastructure: *Staffing the Campaign*

- Structure and roles that support major gift fundraising
  - Clear prospect assignments, portfolios
  - Adequate time to staff the CEO, volunteers
  - Sufficient administrative support
- Annual fundraising activities are maintained

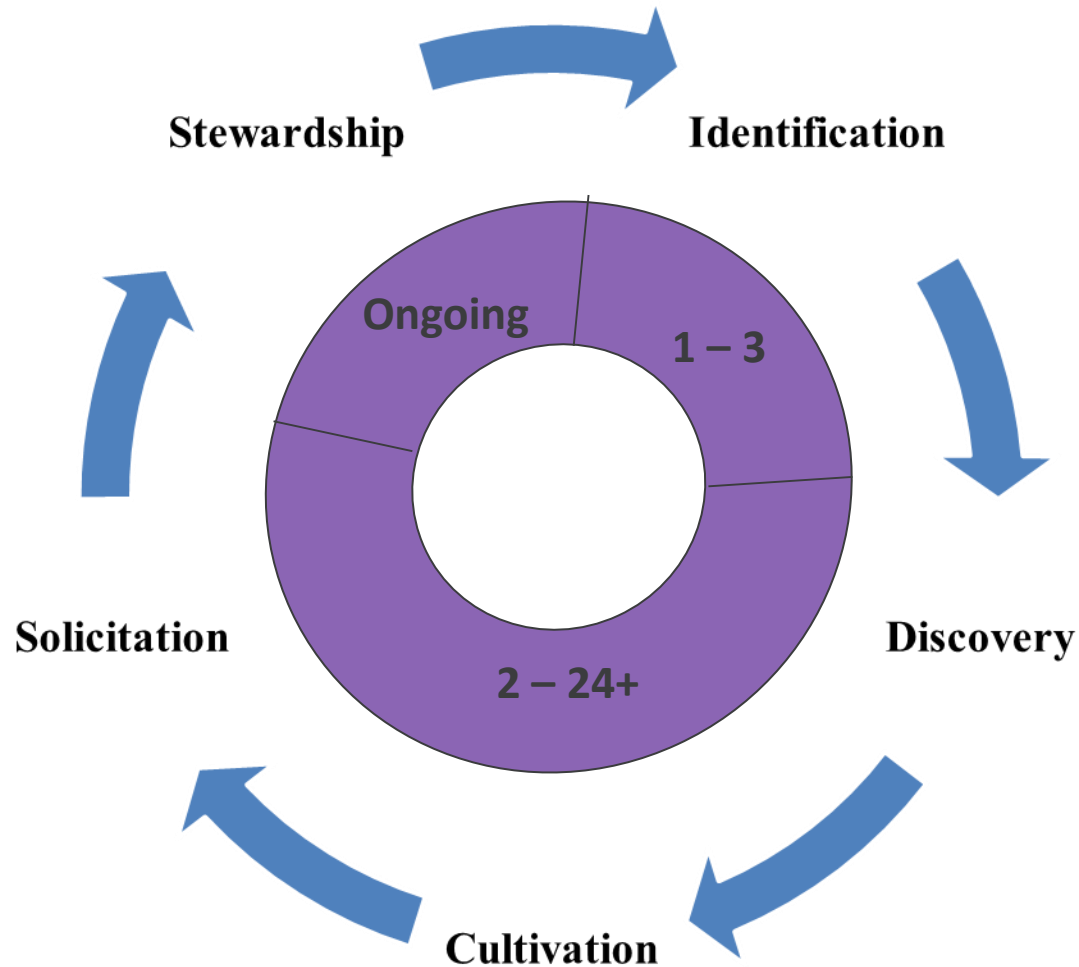


# Infrastructure: *Technology Tools of the Trade*

- Database
  - Robust, with moves management capability
  - Data reliability, integrity
- Prospect research resources
  - Wealth Engine, NOZA, etc.
- Website
  - Sequential additions and information appropriate to the stage of the campaign



# Prospects - Building the Pipeline



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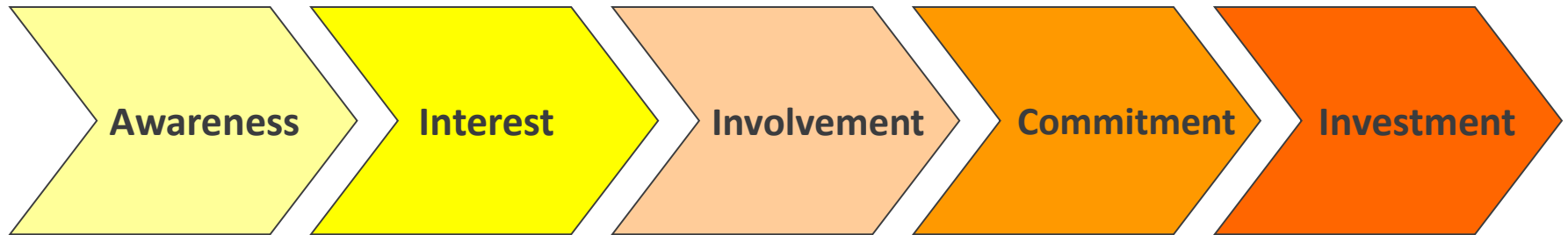
# Know What is Needed

GIFT LEVEL	# OF GIFTS	LEVEL TOTAL	CUMULATIVE
\$1,000,000	(2) <input type="checkbox"/> <input type="checkbox"/>	\$1,000,000	\$ 2,000,000
\$ 500,000	(4) <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$2,000,000	\$ 4,000,000
\$ 250,000	(7) <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$1,750,000	\$ 5,750,000
\$ 100,000	(15) <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$1,500,000	\$ 7,250,000
\$ 50,000	(20) <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$1,000,000	\$ 8,250,000
\$ 25,000	(25) <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ 625,000	\$ 8,875,000
\$ 10,000	(30) <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ 300,000	\$ 9,175,000
\$ Below \$10,000	Many Gifts	\$ 825,000	\$10,000,000



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# Discovery / Cultivation



*Advance the prospect to INVESTMENT*



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# Solicitation

- Right prospect...
- Right project...
- Right amount...
- Right solicitor(s)...
- Right time...

***A Successful Solicitation!***



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# Stewardship

- Diversified and personalized
- An ongoing plan and strategy – not mechanical tactics
- Recognition opportunities
- Involvement opportunities
- Ongoing tracking and management



# Planning Process Timeline

## Campaign Readiness (Months 1 to 2)

- Conduct wealth screening on current and past donors
- Recruit and organize Campaign Planning Committee
- Conduct first Campaign Planning Committee meeting and discuss discovery conversation prospects
- Create campaign planning materials such as a scale of gifts, fact sheet, list of prospects, and board lists
- Develop full discovery interview list (past and current donors, wealth screening results, committee input and Dini Spheris research/knowledge)
- Confirm the top prospects to engage and interview in the study process

## Campaign Planning (Months 3 to 5)

- Schedule and conduct personal discovery conversations with individuals, foundation trustees and corporate executives
- Facilitate focus groups with key constituents, if needed
- Conduct and attend Campaign Planning Committee meetings with updates on interviews and initial trends
- Analysis of discovery conversation findings and formalization of strategy
- Deliver report and recommendations to the Campaign Planning Committee
- Presentation of final report to Board leadership and other appropriate audiences



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# Consider the Impact of...

- Stability or turnover in senior staff leadership
- Economic influencers
- The landscape of other fundraising efforts
- Timing of your last campaign
- Organizational anniversaries or milestones



# Contact Us

- Website: [dinispheris.com](http://dinispheris.com)
- Phone: 713.942.1216
- Email: [mbuchanan@dinispheris.com](mailto:mbuchanan@dinispheris.com)

