

Capital Campaigns: AN IMMERSIVE WORKSHOP

JIM BUSH

CEO and Principal, Winkler Group

June 16 – 18, 2025





**Copyright © 2025 by Winkler Consulting Group, Inc.
dba Winkler Group**

All rights reserved. This course or any portion thereof may not be reproduced or used in any manner whatsoever without the express written permission of Winkler Consulting Group, Inc.

Winkler Group
1036 eWall St
Mount Pleasant, SC 29464



WHY MEMBER SCHOOLS CHOOSE US

More than a coach. A partner who shares the workload.



PROVIDENCE ACADEMY





THANK YOU TO OUR PARTNER



SAIS

**SERVING &
ACCREDITING
INDEPENDENT
SCHOOLS**





SCHOOL INTRODUCTIONS





Your Campaign Readiness: A Quick Assessment



Please rate your agreement with the following statements on a scale of 1 to 5 where 5 = strongly agree and 1 = strongly disagree.

STRATEGIC READINESS	SCORE
Our school has a current strategic plan that guides our big-picture goals and objectives.	
We have clearly defined funding priorities that align with our strategic plan, such as academic programs, endowment growth, and capital improvements.	
Our school has stable or growing enrollment and a strong financial position.	

LEADERSHIP AND VOLUNTEER READINESS	SCORE
School leadership is well respected; donors trust their decision-making abilities.	
Our board is actively engaged in fundraising and understands its role in a campaign.	
We have an engaged group of volunteer leaders—trustees, alumni, and parents—who are willing to open doors, advocate, and lead fundraising efforts.	

ADVANCEMENT AND DONOR READINESS	SCORE
Our donor database is robust and actively maintained.	
Our annual fund is consistently strong, with high participation from current families, alumni, and trustees.	
Our advancement office has the capacity, staffing, and systems needed to support a major fundraising initiative.	
We have an active major gifts program with assigned donor portfolios and regular face-to-face solicitations.	

35
to
50

You are ready to launch a campaign. It's time to consider undertaking a campaign feasibility study.

15
to
34

With some adjustments to your donor cultivation strategies, you'll be ready for a campaign soon.

0
to
14

More work to do. Your institution is not yet ready for a campaign, but that doesn't mean one is out of the question.



WINKLER GROUP

Fueling Your Vision

TODAY'S FUNDRAISING LANDSCAPE





FUNDRAISING LANDSCAPE

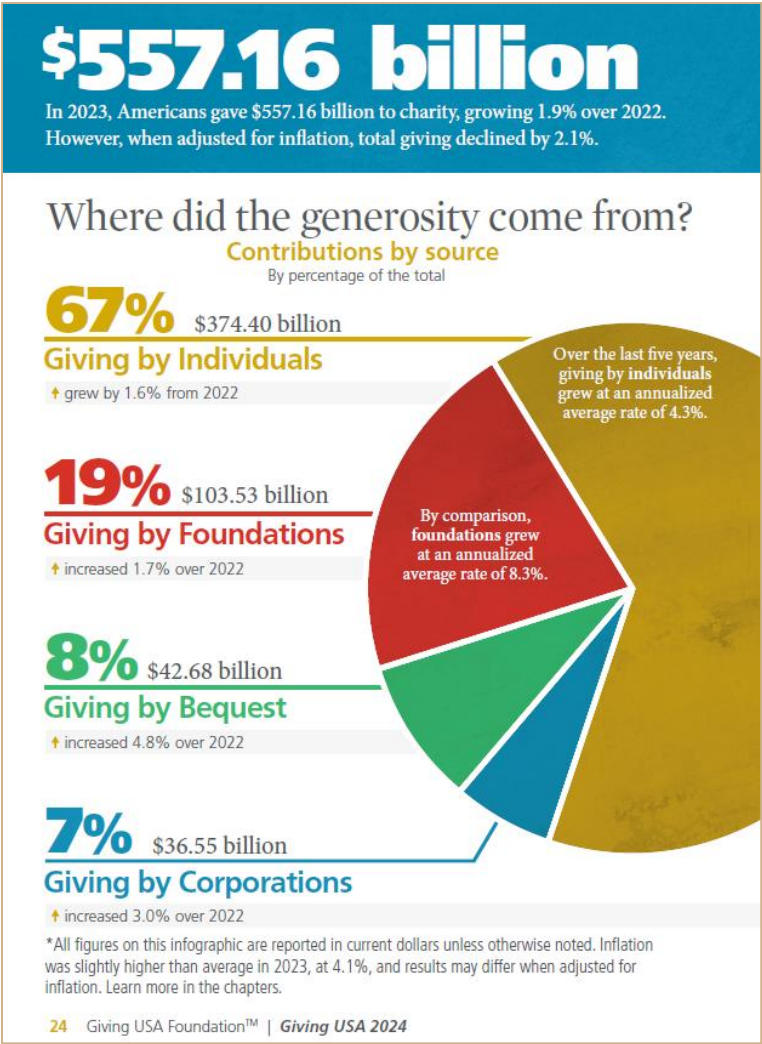
Fundraising realities:

- Overall giving is flat; giving to education is one of the exceptions
- Independent schools are not as vulnerable to economic uncertainty
- Charitable Act brings optimism



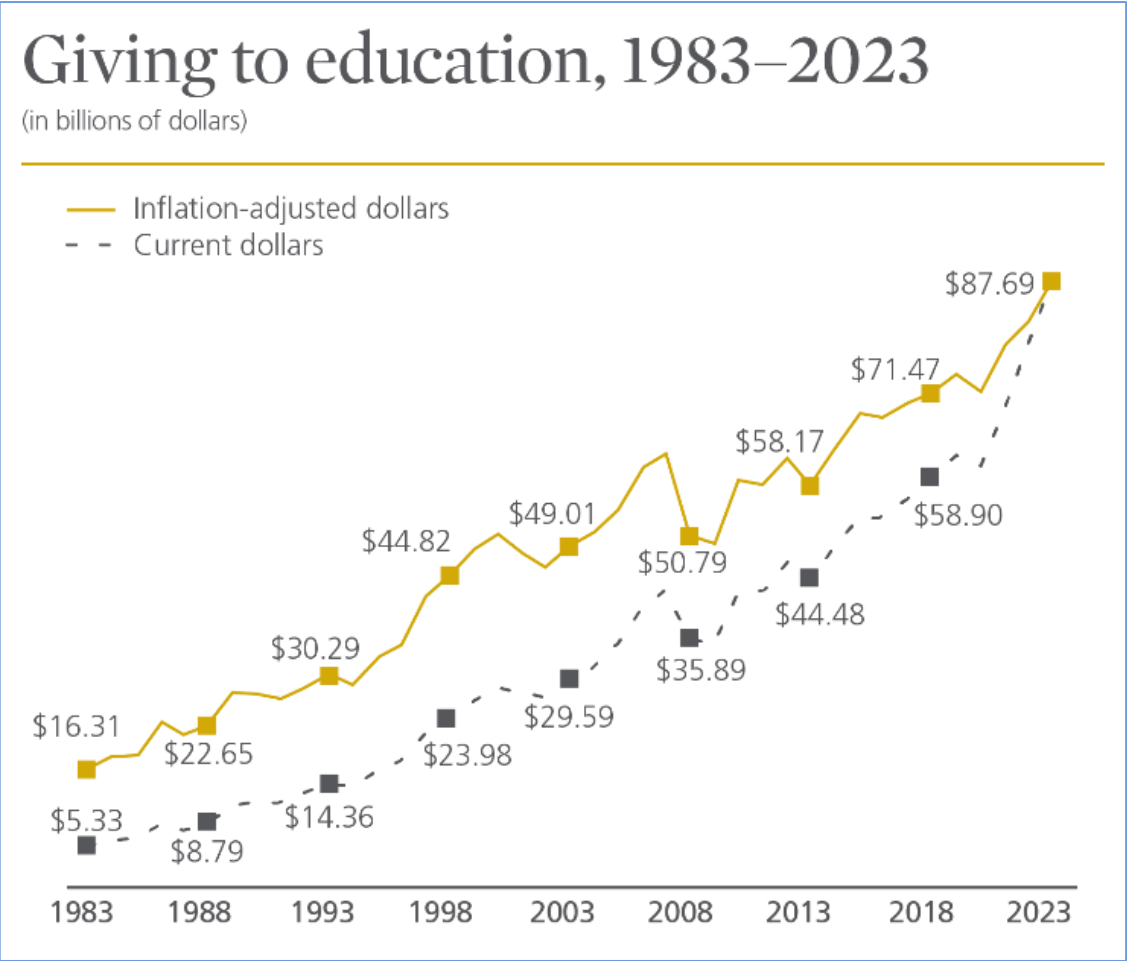


FUNDRAISING LANDSCAPE





FUNDRAISING LANDSCAPE



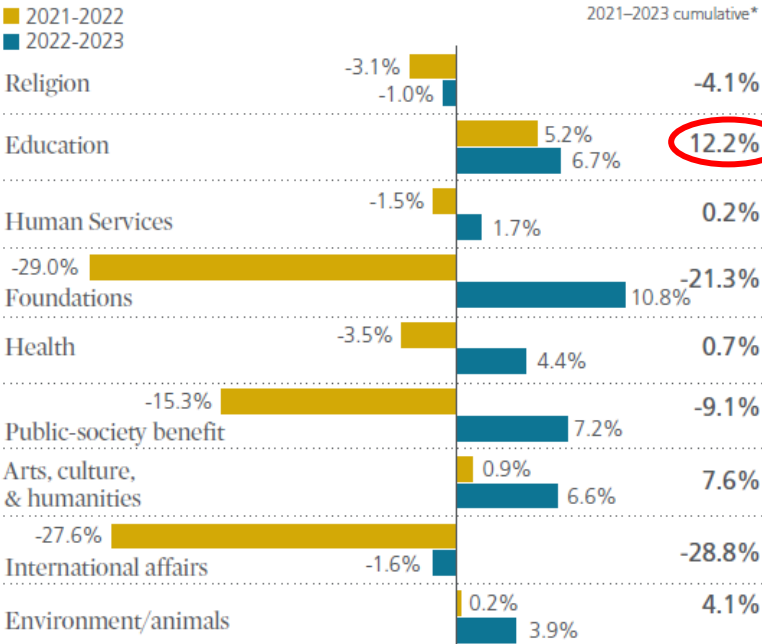


FUNDRAISING LANDSCAPE

Giving USA The Numbers

Changes in giving by type of recipient organization: 2021–2022 and 2022–2023, 2021–2023 cumulative

(in inflation-adjusted dollars, 2023 = \$100)



Percentage change from previous year

*The two-year change is calculated separately and is not the sum of the changes in the two years.





2025 Advancement
Summit: Capital Campaigns

FUNDRAISING LANDSCAPE

GIVING TO INDEPENDENT SCHOOLS

In 2023:

- Median funds raised by independent schools increased by 5.9% to \$1.51 million
- Median number of donors increased by 2.5%; now 570 donor per school

In Partnership With:

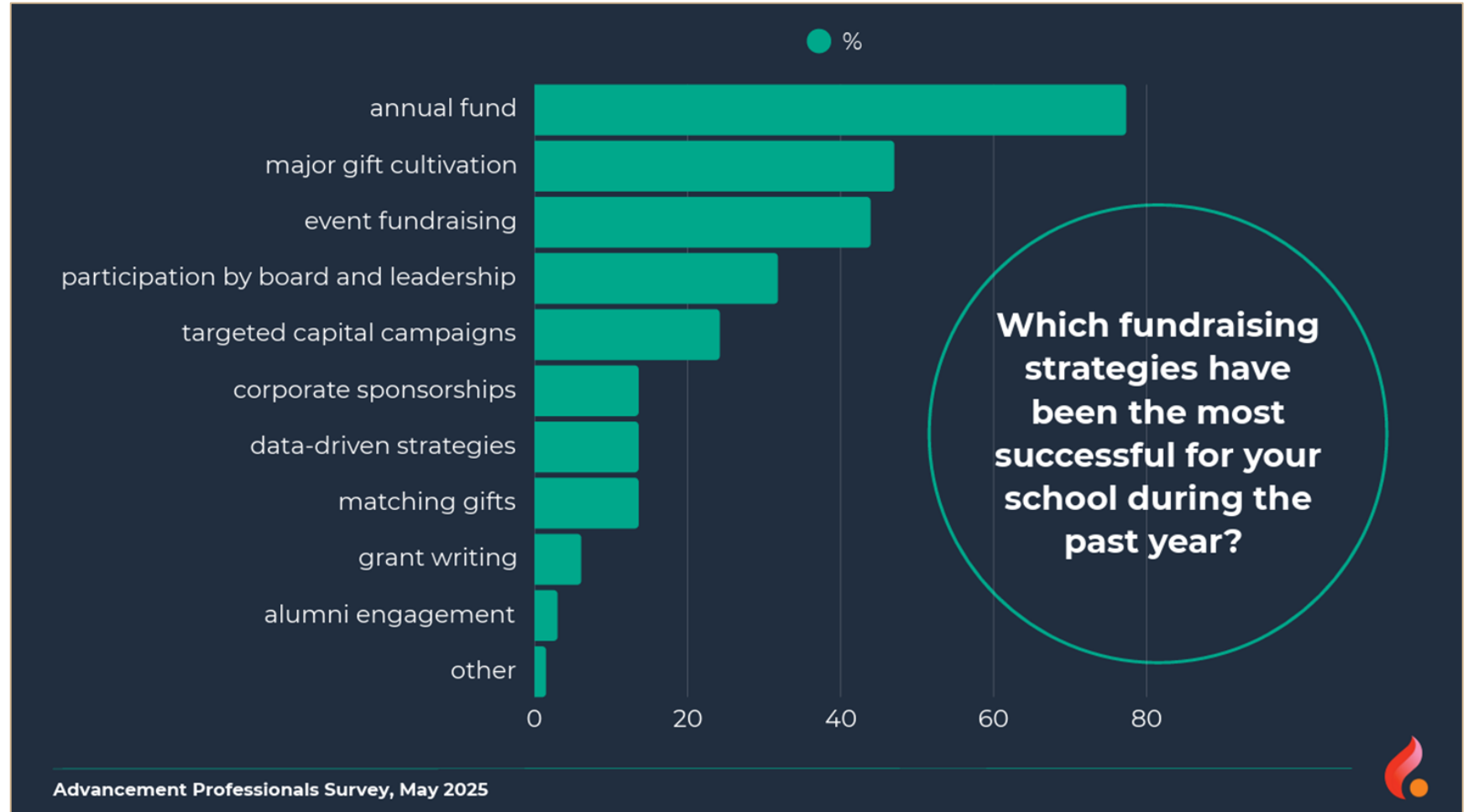




2025 Advancement Summit: Capital Campaigns

FUNDRAISING LANDSCAPE

SAIS PULSE SURVEY



In Partnership With:

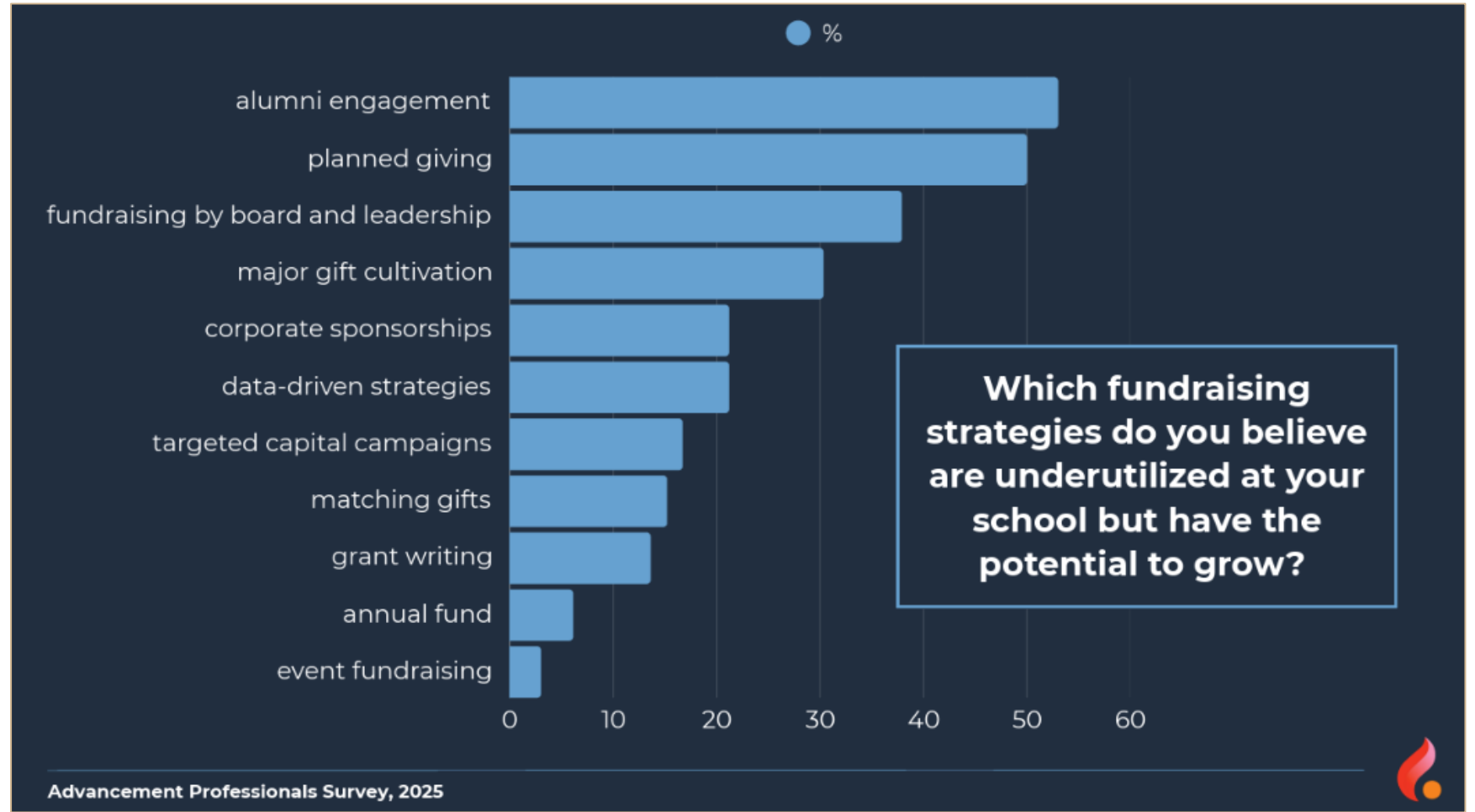




2025 Advancement Summit: Capital Campaigns

FUNDRAISING LANDSCAPE

SAIS PULSE SURVEY



In Partnership With:



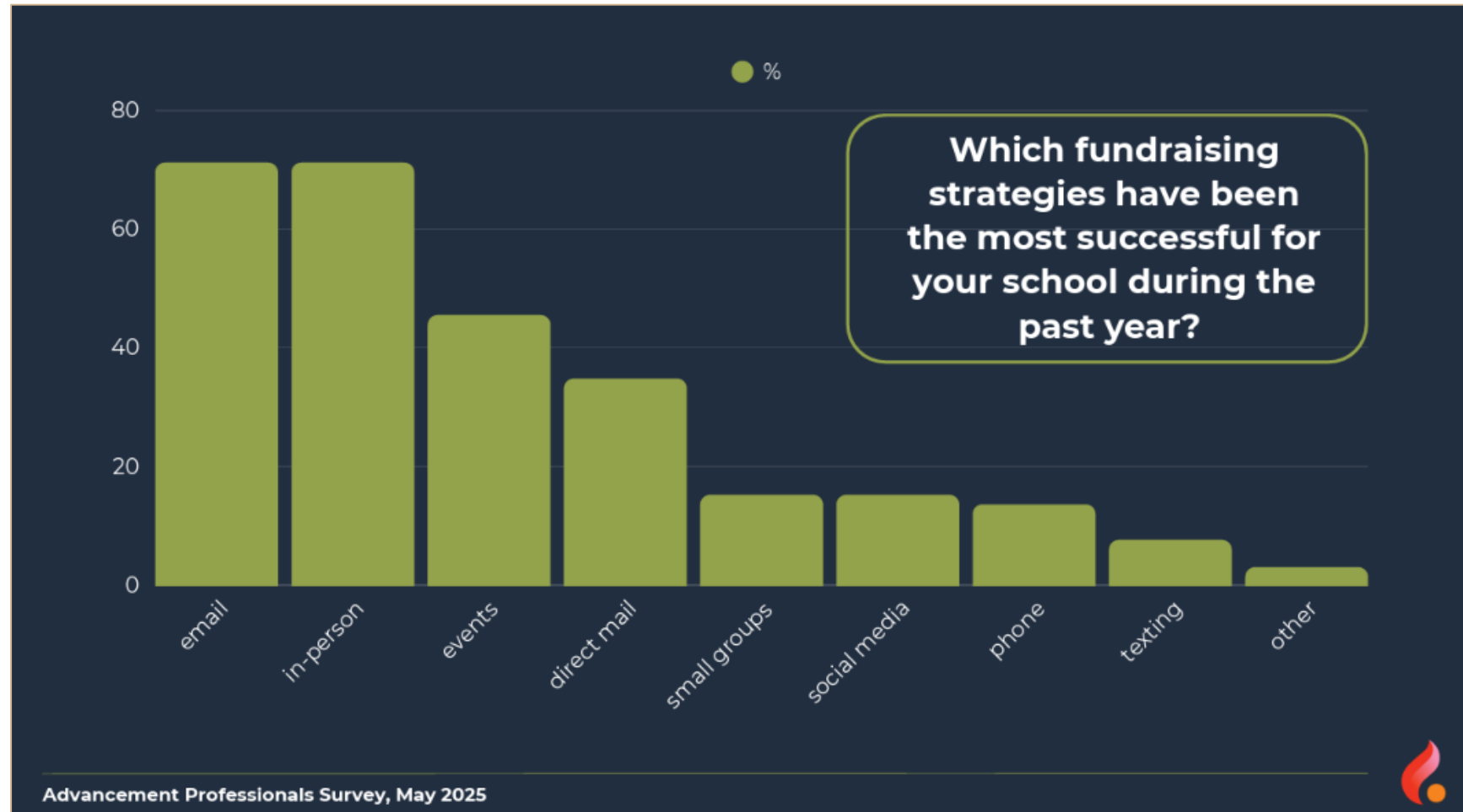


2025 Advancement
Summit: Capital Campaigns

In Partnership With:



FUNDRAISING LANDSCAPE
SAIS PULSE SURVEY

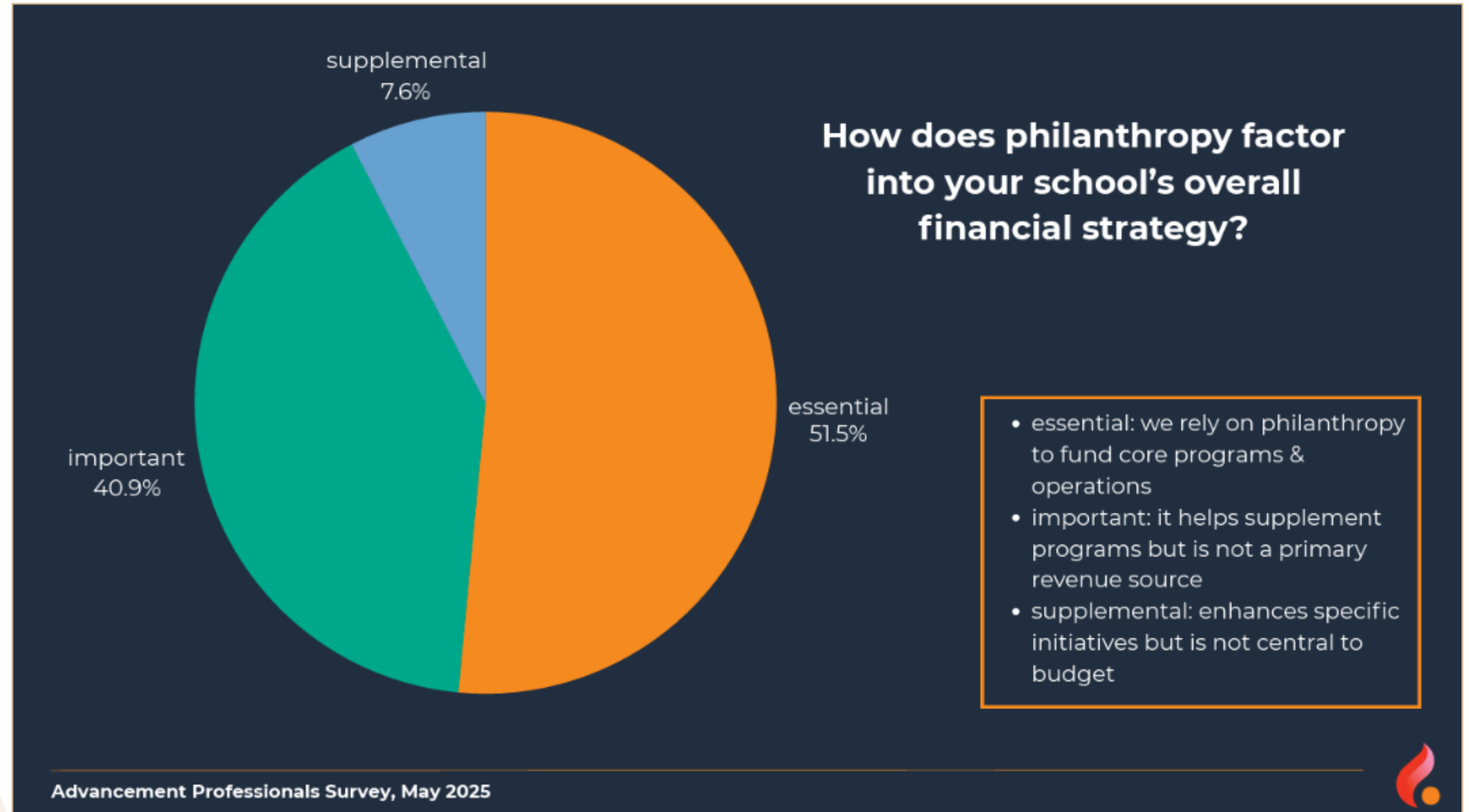




2025 Advancement
Summit: Capital Campaigns

FUNDRAISING LANDSCAPE

SAIS PULSE SURVEY



In Partnership With:





2025 Advancement
Summit: Capital Campaigns

FUNDRAISING LANDSCAPE

LANDSCAPE TO LAUNCH A CAMPAIGN

Despite the economy:

- More major, transformational gifts now than in our 18-year history.
- Donors are more committed (endowment giving is strong)
- Desire to leave a legacy.

Schools that postpone major gifts initiatives or campaigns:

- Postpone the need.
- See larger needs later.
- Unprepared for stock market uptick or economic boom.

In Partnership With:





WINKLER GROUP

Fueling Your Vision

WHAT IS A CAMPAIGN?





TERMINOLOGY

A campaign is a broad term used to describe a focused initiative to raise money over and above normal revenue streams during a specific time frame.





TYPES OF CAMPAIGN

	PURPOSE	PROS/CONS	TYPES OF GIFTS
CAPITAL	Bricks and mortar	Clear Easy to articulate Immediate results Compelling results	Cash Appreciated securities Gifts-in-kind
SPECIAL PROJECTS	Equipment Small construction projects One-time start-up funds Professional development	Clear Easy to articulate Immediate results	Cash Appreciated securities Gifts-in-kind
ENDOWMENT	Unrestricted endowment Donor-restricted endowment Board-restricted endowment	Long-term results Small return on investment	Cash Securities Gifts-in-kind Deferred gifts
COMBINED	Building Equipment Endowment	More complex Short- and long-term results	Cash Securities Gifts-in-kind Deferred gifts
COMPREHENSIVE	Building Equipment Endowment Program Annual fund	Complex Harder to articulate Larger goals PR opportunities Economies of scale	Cash Securities Gifts-in-kind Deferred gifts Annual fund income

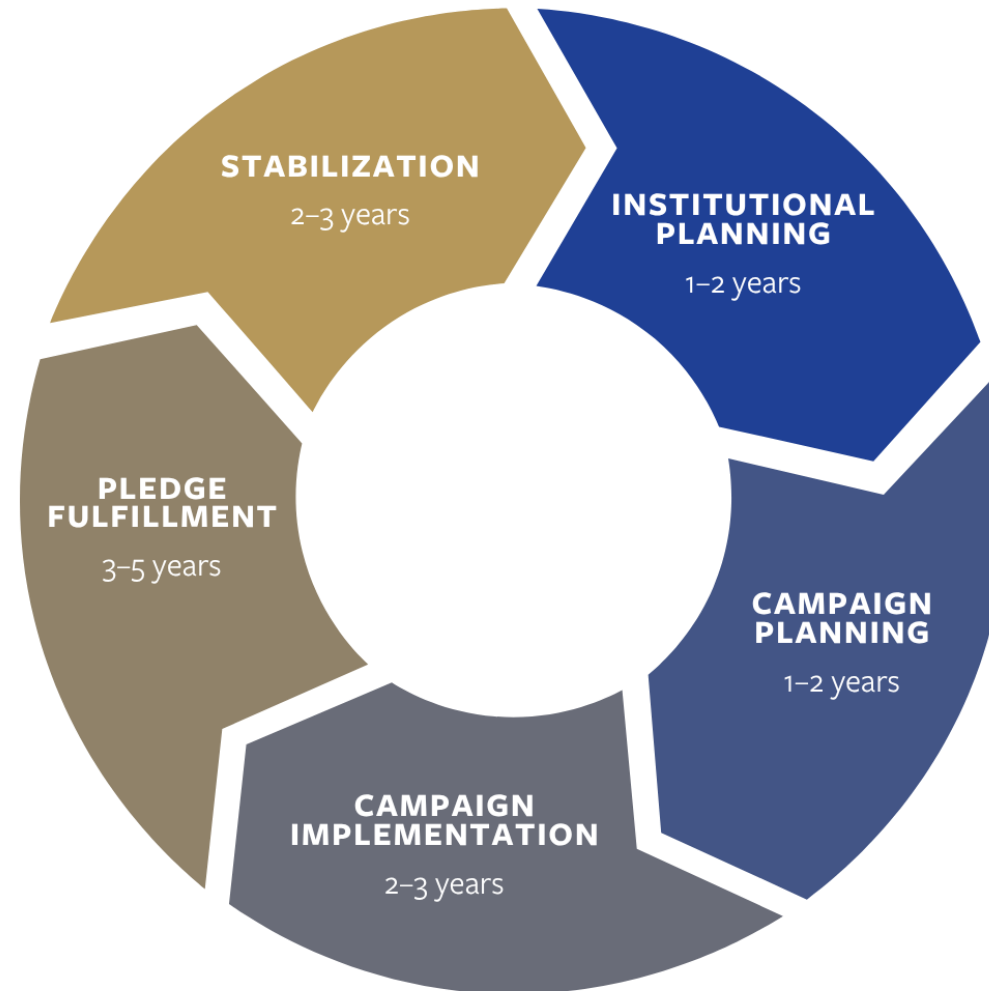




2025 Advancement
Summit: Capital Campaigns

WHAT IS A CAMPAIGN?

CAMPAIGN CYCLE: FIVE PHASES



In Partnership With:



PREPARATION

- Clarify mission and vision
- Define need for campaign
- Strengthen board
- Cultivate donors and volunteers
- Strengthen staff
- Select counsel
- Develop prospect list
- Develop strategic plan
- Identify campaign priorities

PLANNING

- Establish priorities to address
- Conduct campaign study
- Assemble campaign steering committee
- Develop preliminary case for support
- Outline campaign timetable
- Establish campaign policies
- Determine financial campaign goal
- Identify campaign leadership
- Review table of gifts
- Write proposal copy
- Identify and enlist volunteers for soliciting lead gifts
- Establish campaign subcommittees

LEAD GIFT PHASE

- Review prospect list for lead gifts
- Evaluate prospects
- Develop solicitation strategy for each gift
- Train volunteers
- Prepare proposals
- Solicit gifts, “inside out” and “top down”
- Identify and enlist volunteers for soliciting family gifts

Subcommittees

Building
Public Relations
Finance
Prospect Cultivation
Hospitality/Events

MAJOR GIFT PHASE

- Review prospect list for family gifts
- Evaluate prospects
- Develop solicitation strategy for each category of prospects
- Train volunteers
- Prepare proposals
- Solicit gifts
- Identify and enlist volunteers for general phase

PUBLIC PHASE

- Review prospect list for general phase
- Prepare proposals
- Train volunteers
- Campaign kickoff
- Solicit gifts
- Phonathon
- Direct-mail campaign

Public Phase and Celebration Phase

Optional Celebrations

Campaign Kickoff
Goal-reaching party
Groundbreaking
Open house

CELEBRATION AND FINAL PHASE

- Solicitation follow up
- Reporting to campaign volunteers
- Volunteers acknowledgment
- Extra thanks for donors
- Reinforce relationship with volunteers and donors

The Four Pillars of a Successful Campaign



1: VISION & PRIORITIES





1: VISION & PRIORITIES



2: CONFIDENCE IN LEADERSHIP





1: VISION & PRIORITIES



2: CONFIDENCE IN LEADERSHIP



3: WILLINGNESS TO INVEST



1: VISION & PRIORITIES



2: CONFIDENCE IN LEADERSHIP



3: WILLINGNESS TO INVEST



4: VOLUNTEER SUPPORT



**2025 Advancement
Summit: Capital Campaigns**

WHAT IS A CAPITAL CAMPAIGN?

CAMPAIGN PHASES

- Campaign Readiness and Preparation
- Campaign Study
- Campaign Planning Phase
- Quiet Phase
- Public Phase
- Pledge Fulfillment and Stewardship

In Partnership With:





WINKLER GROUP

Fueling Your Vision

GROUNDWORK: ASSESSING YOUR READINESS





2025 Advancement
Summit: Capital Campaigns

ASSESSING YOUR READINESS

WHAT SHOULD YOU BE PREPARED TO EVALUATE?

- School readiness
- Development office readiness
- Donor readiness

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

ASSESSING YOUR READINESS

REQUIREMENTS FOR A SUCCESSFUL CAPITAL CAMPAIGN

- ✓ Compelling needs
- ✓ Credible plan
- ✓ Strong case for support
- ✓ Realistic financial goal
- ✓ Previous fundraising success
- ✓ Sufficient number of qualified prospects
- ✓ Strong staff support and resources
- ✓ Full and early commitment by board of directors

In Partnership With:



School and Organizational Readiness



2025 Advancement
Summit: Capital Campaigns

ASSESSING YOUR READINESS

EVALUATE YOUR SCHOOL

Questions:

- Do you have a full, respected, committed, and effective board of trustees?
- Is your board involved in setting policy and working to implement it?
- Does every board member make financial contributions to your school?
- Is your school well respected by internal stakeholders?

In Partnership With:





SCHOOL READINESS

- Has your school developed an effective strategic plan?
- Have the campaign priorities grown from this plan?
- Do you have a reasonable estimate of the project's budget and timetable?
- Do you have a business plan that shows an estimated operating budget for the new project?
- If successful, will the campaign enable your school to make a significant difference in the community?
- Is your school's leadership excited about the project?



Development Office Readiness



2025 Advancement
Summit: Capital Campaigns

ASSESSING YOUR READINESS

EVALUATE YOUR DEVELOPMENT OFFICE

- Administration
- Development program
- Staffing
- Leadership
- Annual fund
- Major gifts
- Alumni
- Corporate and foundation gifts
- Planned gifts
- Prospect research
- Software
- Gift accounting and acknowledgement
- Naming policy
- Volunteers
- Culture
- Community
- Donor relations
- Parents and grandparents

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

ASSESSING YOUR READINESS

EVALUATE YOUR DEVELOPMENT OFFICE

Questions:

- Annual giving from individual donors?
- Last three years of giving?
- Constituent and giving data up-to-date and retrievable?
- Staff realistically prepared to focus on major gifts?

In Partnership With:





STAFF ROLES

Information and Communication	Head of School	Development Director	Development Assistant
Manage data and computer systems		✓	✓
Keep donor records		✓	✓
Thank donors	✓	✓	✓
Track and report solicitation progress		✓	✓
Track and report campaign progress	✓	✓	
Disseminate campaign information	✓	✓	✓
Schedule and present speeches	✓	✓	
Communicate with solicitors	✓	✓	✓
Communicate with volunteers	✓	✓	✓
Communicate with campaign leadership	✓	✓	
Communicate with staff about the campaign	✓	✓	
Prepare and distribute meeting notes			✓





STAFF ROLES

	Head of School	Development Director	Development Assistant
Support			
Schedule appointments	✓	✓	✓
Schedule meetings		✓	✓
Attend to details of meeting setup		✓	✓
Follow up after meetings		✓	✓
Send reminder notices			✓
Make follow up phone calls			✓
Draft proposals	✓	✓	
Prepare proposals			✓
Handle and coordinate all campaign paperwork		✓	✓
Encourage and motivate	✓	✓	





STAFF ROLES

	Head of School	Development Director	Development Assistant
Planning			
Recruit volunteers	✓	✓	
Solicit gifts	✓		
Design campaign strategies	✓	✓	
Plan project	✓		
Develop internal case for project	✓	✓	
Plan work of campaign steering committee	✓	✓	
Preparation			
Gather information about prospects	✓	✓	✓
Identify and cultivate donors and volunteers	✓	✓	
Organize prospect rating sessions		✓	✓
Assess development office systems		✓	✓
Engage consultant, designer, etc.	✓	✓	





STAFF ROLES

	Head of School	Development Director	Development Assistant
Implementation			
Recruit campaign leadership	✓	✓	
Recruit campaign volunteers	✓	✓	
Train solicitors		✓	
Solicit gifts	✓	✓	
Coordination			
Coordinate work of outside professionals		✓	✓
Coordinate campaign materials		✓	✓
Coordinate public relations		✓	✓
Coordinate campaign events		✓	
Coordinate campaign newsletters		✓	✓
Coordinate internal flow of information		✓	✓
Coordinate direct-mail campaign		✓	✓





STAFF ROLES

Coordination (cont.)	Head of School	Development Director	Development Assistant
Coordinate staff campaign		✓	✓
Coordinate donor recognition		✓	✓
Coordinate plaque preparation		✓	✓



Donor Readiness



2025 Advancement
Summit: Capital Campaigns

ASSESSING YOUR READINESS

EVALUATE YOUR DONOR BASE

Are your donors...

- Cultivated?
- Engaged?
- Properly qualified?
- Connected to the school and/or priorities?
- Educated about the priorities?
- Bought in to vision?

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

ASSESSING YOUR READINESS

EVALUATE YOUR DONOR BASE

Do your donors feel or have...

- Trust in the leadership of the school?
- An inclination to give?
- They can voice opinions and have their feedback heard?
- Genuinely appreciated?
- Have they been involved in setting the strategic direction for your school?

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

ASSESSING YOUR READINESS

CORPORATIONS AND FOUNDATIONS

- **Corporations:** Only 6% of all giving; less than 1% of pre-tax profits
- More wealthy donors are choosing foundations and DAFs
- Must cultivate and steward like individuals
- DAFs will continue to grow in popularity

In Partnership With:



Turn in Your Campaign Readiness Worksheet



WINKLER GROUP

Fueling Your Vision

CAMPAIGN BREAKOUT





CAMPAIGN BREAKOUT

Scenario:

As you think about your specific campaign, identify three challenges and three opportunities that your school is facing based on the information we have provided.

You will need:

- A reporter
- Top **three** challenges and opportunities on a flip chart





WINKLER GROUP

Fueling Your Vision

WHAT IS A CAMPAIGN STUDY?





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

PHASE I OF THE CAMPAIGN?

- Blueprint for everything you do in a campaign
- Absolutely necessary
- Cultivate donors
- Engage ALL current and past stakeholders
- Ask for feedback = investment
- Build energy and buzz
- Proof that donors aren't an ATM
- Individual solicitation strategies for all lead donors

In Partnership With:





CAMPAIGN STUDY GOALS

The campaign study answers the following:

- Is a campaign possible?
- How much money can potentially be raised?
- Most effective fundraising strategies
- Best path forward
- Headwinds and tailwinds
- Preliminary campaign timetable





CAMPAIGN STUDY GOALS

The campaign study answers the following:

- Recommendations for a realistic and appropriate campaign goal
- Chance to listen to donors
- Potential campaign leaders and donors
- Insights about school perception in community and by stakeholders
- Identifies potential challenges to be addressed





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

A GOOD CAMPAIGN STUDY WILL...

- Lay the foundation for success
- Recoup its expense and then some
 - Every campaign study we have done in our 20-year history has identified additional, new gifts that repaid the cost of the study.
- Cultivate major donors
- Get your constituency excited and ready to go into a campaign

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

A GOOD CAMPAIGN STUDY WILL...

- Give a sense of whether there is a strong group of supporters who are eager to help
- Provide a way of assessing the probability of a successful campaign
- Prime the pump with donors
- Shorten the campaign!

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

QUESTIONS TO ANSWER BEFORE YOUR CAMPAIGN STUDY BEGINS

- What project(s) will campaign fund?
- How and when will project be realized?
- Cost of project?
- How will it be paid for?
- What financial goal will be tested in the study?
- Which individuals are key to project success?

In Partnership With:





WINKLER GROUP

Fueling Your Vision

CAMPAIGN STUDY TIMELINE AND PHASES





PHASES OF A CAMPAIGN STUDY

	TIMELINE	DELIVERABLES
PHASE IA: Feasibility Study Interview Prep	Month One	Campaign case prospectus Donor data review Interviewee identification
PHASE IB: Feasibility Study Interviews	Month Two	In-person donor interviews Donor insight survey Weekly findings reports
PHASE IC: Feasibility Study Recommendations	Month Three	Campaign recommendations and strategy delivery Board approval





**2025 Advancement
Summit: Capital Campaigns**

THE CAMPAIGN STUDY

CAMPAIGN PHASES

- 10–12 weeks
- 90% of campaign success is planning
- 10% is working the plan
- Do not skip this critical step
- You will raise more money by investing the time in campaign planning

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

THE CAMPAIGN STUDY

CAMPAIGN PHASES

- Study prep phase: four weeks
- Interview and survey phase: 2–3 weeks
- Analysis phase: 3–4 weeks
- Delivery of analysis and recommendations: Week 10 or 11

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

CAMPAIGN PHASES

Interview and Survey Phase: 2–3 weeks

- Conduct one-on-one interviews with as many potential leadership donors as possible
- Strive for 35–50 (Guess the record!)
- Conduct an electronic donor insight survey to get feedback from ALL stakeholders

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

CAMPAIGN PHASES

Analysis Phase: 3-4 weeks

- Consultant analyzes all quantitative and qualitative data from interviews and donor insight survey
- Consultant develops recommendations and prepares reports for delivery to faculty/staff and board leadership
- School prepares board leadership to move forward with the campaign immediately upon delivery of the recommendation

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

CAMPAIGN PHASES

Final report delivery and board vote: Week 10 or 11

- Quantitative and qualitative reports are delivered in advance to faculty and staff leadership
- Analysis and recommendation are shared with board ahead of the meeting
- Counsel delivers analysis and recommendations to move forward with campaign
- Board votes to immediately move into the campaign

In Partnership With:





WINKLER GROUP

Fueling Your Vision

WHO CONDUCTS THE CAMPAIGN STUDY?





**2025 Advancement
Summit: Capital Campaigns**

THE CAMPAIGN STUDY

WHY USE OUTSIDE COUNSEL

- Objectivity
- Candor
- Credibility (real or perceived)
- Best practices
- Professionalism
- Time
- Resources
- ROI

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

COST OF A CAMPAIGN STUDY

- Varies anywhere from \$20k to \$100k
- 35–50 interviews minimum
- You get what you pay for
- Make sure to compare different consulting firms using apple-to-apple comparisons
- Budget for fundraising just like you would for an architect

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

THE CAMPAIGN STUDY

PRIORITIES AND TEST GOAL

- Your priorities should be needs not wants
- The number of priorities and test goal must be realistic
- Should you test more priorities than you may include in your campaign?

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

TEST GOAL AND GIFT CHART

- Pareto Principle
- “80 percent of consequences come from 20 percent of the causes”
- 90/10 Rule
- Gut Check

In Partnership With:





SAMPLE GIFT CHART

Gift Chart: \$10,000,000

Gift Range	No. of Gifts Required	No. of Prospects Required	Subtotal	Cumulative Total	Cumulative Percentage
\$1,000,000+	1	4	\$1,000,000	\$1,000,000	10%
\$750,000 - \$999,999	1	4	\$750,000	\$1,750,000	18%
\$500,000 - \$749,999	2	8	\$1,000,000	\$2,750,000	28%
\$380,000 - \$499,999	3	12	\$1,140,000	\$3,890,000	39%
\$250,000 - \$379,999	5	20	\$1,250,000	\$5,140,000	51%
\$190,000 - \$249,999	8	32	\$1,520,000	\$6,660,000	67%
\$130,000 - \$189,999	10	40	\$1,300,000	\$7,960,000	80%
\$63,000 - \$129,999	12	48	\$756,000	\$8,716,000	87%
\$25,000 - \$62,999	12	48	\$300,000	\$9,016,000	90%
Under \$25,000	78	314	\$984,000	\$10,000,000	100%
Totals	132	528		\$10,000,000	





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

CAMPAIGN STUDY CHECKLIST



Are the function and purpose of a fundraising campaign study understood?



Can that understanding be articulated to board members, faculty/staff, and volunteers?



Has a consultant been hired who can conduct a campaign study?



Has a case prospectus been drafted?



Is the consultant's role in conducting the campaign study well understood?



Has a list of donor prospects for the campaign study committee been drawn up?



Have materials for the campaign study committee been prepared?



Is it clear what the committee's function will be?

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

CAMPAIGN STUDY CHECKLIST, CONTINUED

- ✓ Has the consultant drafted the letter requesting a campaign study interview?
- ✓ Has it been made clear to the consultant that leadership expects to see the first draft of the report?
- ✓ Is the confidentiality of the campaign study well understood?
- ✓ Does the report make clear, timely, and specific recommendations?
- ✓ Is the report being distributed to build understanding and ownership in the project?
- ✓ Have interview participants been thanked and informed of the results of the study?
- ✓ Have committee members been thanked?

In Partnership With:





WINKLER GROUP

Fueling Your Vision

DEVELOPING THE CASE PROSPECTUS





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

WHAT IS A CASE PROSPECTUS?

- A document used in the campaign study phase that explains the project and its importance in the community.
- A case prospectus describes in simple and compelling terms the vision and the needs that the school hopes to address with the money it raises, and it presents a credible plan for satisfying those needs.

Your case prospectus is not the full campaign case for support that will be used during the campaign.

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

PURPOSE OF A CASE PROSPECTUS

Interview:

- Donors
- School
- Faculty/Staff
- Volunteers
- Board of Trustees
- Alumni
- Parents
- Stakeholders

Purpose:

- Helps create buy-in
- Can be used as cultivation tool
- Answers “So What?” and “Who Cares?”
- Needs to be others-oriented

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

CONTENTS OF A CASE PROSPECTUS

- School's vision
- School's future opportunities in light of the community's needs
- Projects or programs that will be made possible by the campaign

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

THE CASE PROSPECTUS SHOULD...

- Realistic plan of action
- Campaign dollar amount
- Key people involved in raising the money
- Show sense of urgency
- Be easy to remember
- Call people to action
- Focus on return on investment

In Partnership With:





WINKLER GROUP

Fueling Your Vision

CAMPAIGN BREAKOUT





CAMPAIGN BREAKOUT

Begin developing your case prospectus!

Remember, a case prospectus is not the full case; it is the business case to generate feedback during the study. **Your prospectus should:**

- Identify the problem(s) to be solved
- Outline the solutions (campaign priorities)
- Be both rational and emotional
- Be optimistic
- Show urgency and call people to action

You will need:

- A reporter
- Write your major points on a flip chart





WINKLER GROUP

Fueling Your Vision

INTERVIEWEE QUALIFICATION





2025 Advancement
Summit: Capital Campaigns

INTERVIEWEE QUALIFICATION

INTERVIEWEE RESEARCH AND QUALIFICATION

- Where to start?
 - Best major gift prospects are already in your database
- Most gifts will come from individual donors
- Inside out
- Donor base
- History of giving
- Wealth screenings
- Peer review
- Foundations and corporations

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

INTERVIEWEE QUALIFICATION
PROSPECTS

- Capacity and affinity
 - Giving history
 - Wealth screening
 - Other considerations including political and common sense
- Holds true for foundations and corporations

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

INTERVIEWEE QUALIFICATION

CORPORATIONS AND FOUNDATIONS

- Significant time investment required
- Corporate giving is less than 7% of all giving
- Both are extremely competitive
- Very relationship-driven
- Need a moves management plan just like individuals
- Great way to ease board members into fundraising

In Partnership With:





INTERVIEWEE QUALIFYING

INTERVIEWEE QUALIFICATION

- Identify top 150 donor prospects
- Gather a qualifying committee
- Confidential
- Small (6 maximum) people who are well-connected and known in the community





2025 Advancement
Summit: Capital Campaigns

INTERVIEWEE QUALIFICATION

RESEARCHING INDIVIDUALS

- When researching individuals, the goal is to provide answers to the following:
 - What is the interviewee's financial capacity?
 - What are the interviewee's philanthropic interests?
- How well does the interviewee know the school?
- What is the interviewee's inclination to stretch in their giving to the campaign?
- Who is the right person to ask the interviewee for a gift?

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

INTERVIEWEE QUALIFICATION

FACTORS TO CONSIDER

- Giving history: 10x annual fund gift
- Wealth screening
- Affinity
- Capacity
- Peer review

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

INTERVIEWEE QUALIFICATION

INTERVIEWEE QUALIFYING COMMITTEE

- A process of peer review of donor capacity and inclination
- A critical step in the campaign study process
- 6–7 peers who know your donors and have insight into their inclination and potential capacity
- This is a highly confidential meeting

In Partnership With:





TERMINOLOGY

Capacity is a person's financial ability to make a gift if they have sufficient interest.





PROSPECT QUALIFYING: CAPACITY

- **Factors to consider:** accumulated or inherited wealth, stocks, bonds, real and personal property, business ownership, access to family corporations, foundations, or trusts, and annual income.
- Because people are often uncomfortable discussing wealth, a numeric value is used to sort prospects.

- 1 \$250,000 or more (3- to 5-year pledge capacity)
- 2 \$100,000 or more (3- to 5-year pledge capacity)
- 3 \$50,000 or more (3- to 5-year pledge capacity)
- 4 \$25,000 or more (3- to 5-year pledge capacity)
- 5 \$10,000 or more (3- to 5-year pledge capacity)
- 6 \$5,000 or more (3- to 5-year pledge capacity)





TERMINOLOGY

Inclination is an individual's identification with your mission and vision, independent of financial ability.





PROSPECT QUALIFYING: CAPACITY

- Enter A through E based on your best knowledge of the prospect. Leave blank only if you have no knowledge whatsoever.
- **Factors to consider:** level of interest, number of years associated with the school, level of involvement, and previous giving.

A

High level of interest in the organization.

B

Moderate level of interest. Likely donates or attends activities.

C

Low level of interest but with potential for cultivation. Is interested in the mission.

D

Low level of current interest in the organization but was once involved, with potential for re-cultivation.

E

No interest and little hope for cultivation.





PROSPECT QUALIFYING WORKSHEET

Prospect Rating Sheet

Last Name	First Name	Spouse	Capacity	Inclination	Your Relationship	Best Contact
Skywalker	Anakin	Padme				
Dunphy	Phil	Claire				
Ricardo	Lucy	Ricky				
Addams	Gomez	Morticia				
Belcher	Bob	Linda				
Organa	Bail	Breha				
Lars	Owen	Beru				
Tudor	Arthur	Catherine				





WINKLER GROUP

Fueling Your Vision

CAMPAIGN STUDY INTERVIEWS AND DONOR INSIGHT SURVEY





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN STUDY

CAMPAIGN STUDY INTERVIEWS

Interviews:

- One-on-one
- Conversational, professional, relaxed
- Advocate for school
- Tell the story
- Explain ROI
- LISTEN
- Not just passive recorder
- Read between the lines

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN STUDY

DONOR INSIGHT SURVEY

Surveys:

- Electronic
- Subset of questions from the interview
- Invites feedback from all stakeholders
- Should be tabulated separately and also combined with interview responses

In Partnership With:



Survey response rates are, on average, between 8 and 10 percent.



2025 Advancement
Summit: Capital Campaigns

CAMPAIGN STUDY

CONTINUE CULTIVATION VIA FOLLOW-UP

- Thank-you letter
- Cultivation
- Promote buy-in
- Let prospects know you were listening
- Show responsiveness

In Partnership With:



Essential Deliverables of the Final Report



2025 Advancement
Summit: Capital Campaigns

CAMPAIGN STUDY

FINAL REPORT

Every responsible report should be qualitative and quantitative and include the following:

- ✓ **Executive Summary.** An executive summary of one to two pages encapsulates the primary findings and recommendations of the report.
- ✓ **Content.** There should be sections in the body of the report that briefly describe the process used to conduct the study, a description and analysis of findings from the interviews, conclusions drawn from the findings, and specific recommendations about how the school should proceed.

In Partnership With:





FINAL REPORT

Every responsible report should be qualitative and quantitative and include the following:

- ✓ **Quotations.** Selected quotations from the interviews, often organized by topic and presented without attribution. Well-chosen quotations help the reader understand the range of opinions heard.
- ✓ **Charts and Graphs.** To illustrate graphically the distribution of responses.
- ✓ **Appendices.** Names of all those interviewed and committee members plus all material used to conduct the study, the case prospectus, interview questions, gift range chart, and any other relevant documentation.





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN STUDY

FINALIZING THE REPORT

- Consultants should submit a draft of the report to the development director, head of school, and board chair to read **before it is shown to anyone else.**
- Once these individuals have seen the report, the final draft should be distributed to the campaign study committee for their consideration and feedback before being presented to the board.

In Partnership With:





CAMPAIGN STUDY **FINAL REPORT**

- **The report is the school's property.**
- The school should expect all information including names of lead gift prospects, campaign leadership, and early indicators of individual gift ranges.
- The consulting firm will provide a list of confidential names that will not be included in the final report but will be distributed to the school for their use.

In Partnership With:



ENSURING YOUR LEADERSHIP IS READY TO LAUNCH THE CAMPAIGN



2025 Advancement
Summit: Capital Campaigns

THE CAMPAIGN STUDY

ENSURING YOUR LEADERSHIP IS READY

The campaign study is phase I of your campaign.

- Only “test the waters” if you are willing to go into a campaign.
- Your campaign financial goal recommendation will likely be less than the project costs.
- You must line up board support well before the deliver of the campaign study results.
- Your objective is to end the study on Friday and start the campaign planning on Monday.
- It’s all about building on the momentum gained during the campaign study.

In Partnership With:





WINKLER GROUP
Fueling Your Vision

CAMPAIGN BREAKOUT





CAMPAIGN BREAKOUT

Scenario:

You are in week two of interviews and interviewees are overwhelmingly excited about moving forward with a campaign. Your board is on the fence.

- Develop a plan to get board members ready to vote to move forward with a campaign immediately after the final campaign study report delivery.

You will need:

- A reporter
- Write your major points on a flip chart

Hint: This plan needs to start prior to the final report delivery.





WINKLER GROUP

Fueling Your Vision

PHASE II: CAMPAIGN PLANNING



Overview and Timeline



2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

PLANNING PHASE

- Three months
- 90% of campaign success is planning
- 10% is working the plan
- Do not skip this critical step
- You will raise more money by investing the time in campaign planning

In Partnership With:





STAFF ROLES

Information and Communication	Head of School	Development Director	Development Assistant
Manage data and computer systems		✓	✓
Keep donor records		✓	✓
Thank donors	✓	✓	✓
Track and report solicitation progress		✓	✓
Track and report campaign progress	✓	✓	
Disseminate campaign information	✓	✓	✓
Schedule and present speeches	✓	✓	
Communicate with solicitors	✓	✓	✓
Communicate with volunteers	✓	✓	✓
Communicate with campaign leadership	✓	✓	
Communicate with staff about the campaign	✓	✓	
Prepare and distribute meeting notes			✓





STAFF ROLES

	Head of School	Development Director	Development Assistant
Support			
Schedule appointments	✓	✓	✓
Schedule meetings		✓	✓
Attend to details of meeting setup		✓	✓
Follow up after meetings		✓	✓
Send reminder notices			✓
Make follow up phone calls			✓
Draft proposals	✓	✓	
Prepare proposals			✓
Handle and coordinate all campaign paperwork		✓	✓
Encourage and motivate	✓	✓	





STAFF ROLES

	Head of School	Development Director	Development Assistant
Planning			
Recruit volunteers	✓	✓	
Solicit gifts	✓		
Design campaign strategies	✓	✓	
Plan project	✓		
Develop internal case for project	✓	✓	
Plan work of campaign steering committee	✓	✓	
Preparation			
Gather information about prospects	✓	✓	✓
Identify and cultivate donors and volunteers	✓	✓	
Organize prospect rating sessions		✓	✓
Assess development office systems		✓	✓
Engage consultant, designer, etc.	✓	✓	





STAFF ROLES

Implementation	Head of School	Development Director	Development Assistant
Recruit campaign leadership	✓	✓	
Recruit campaign volunteers	✓	✓	
Train solicitors		✓	
Solicit gifts	✓	✓	
Coordination			
Coordinate work of outside professionals		✓	✓
Coordinate campaign materials		✓	✓
Coordinate public relations		✓	✓
Coordinate campaign events		✓	
Coordinate campaign newsletters		✓	✓
Coordinate internal flow of information		✓	✓
Coordinate direct-mail campaign		✓	✓





STAFF ROLES

Coordination (cont.)	Head of School	Development Director	Development Assistant
Coordinate staff campaign		✓	✓
Coordinate donor recognition		✓	✓
Coordinate plaque preparation		✓	✓





2025 Advancement
Summit: Capital Campaigns

In Partnership With:



CAMPAIGN: PLANNING PHASE

WATERFALL TIMELINE

Activity	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May
1. Establish Campaign Office												
2. Develop Gift Acceptance Policies/Guidelines												
3. Enlist Qualifying Committee												
4. Identify and Qualify Top 100 Prospects												
5. Identify Steering Committee Prospects												
6. Develop Case Statement												
7. Conduct Prospect Rating Meetings												
8. Recruit Steering Committee												
9. Faculty/Staff Solicitations												
10. Cultivation Events												
11. Lead Gift Solicitations												
12. Major Gift Solicitations												
13. Community Solicitations												
14. Public Announcement												
15. Grants												
16. Corporate/Vendor Solicitations												
17. Follow-up Calls												
18. Conduct Mail Sweep												
19. Follow Through												
20. Celebrate												

Longer timeline is required for larger campaign goals.

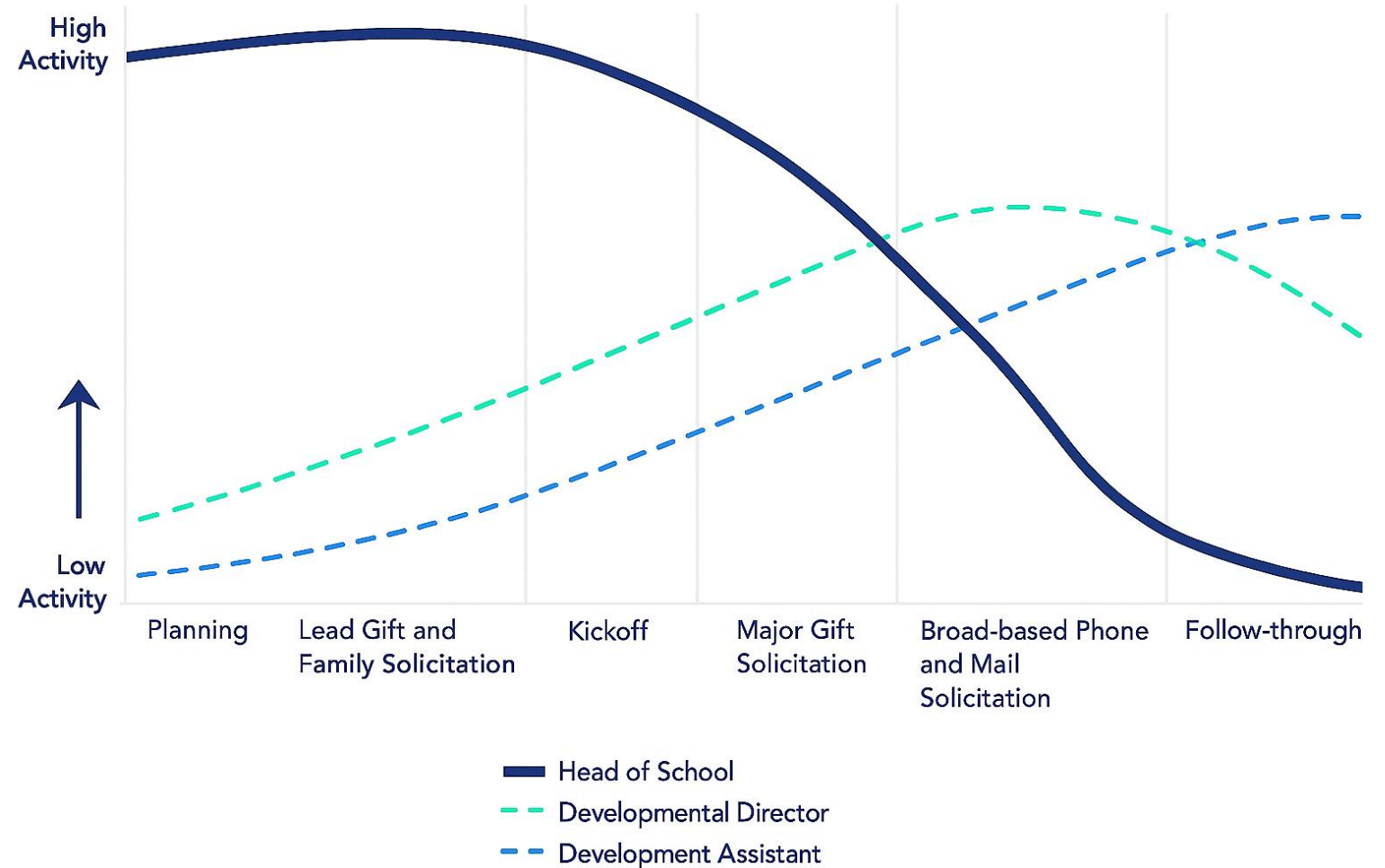




2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

CAMPAIGN ACTIVITY LEVELS



In Partnership With:



Major Outcomes of the Campaign Planning Phase

Finalize Campaign Priorities and Financial Goal



**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: PLANNING PHASE

FINALIZE CAMPAIGN PRIORITIES

- You will likely have to pare down your list of projects
- Use the donor feedback you received from the study
- Now engage the architect to prepare realistic plans
- Start doing research and getting answers to donors' questions

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: PLANNING PHASE

FINANCIAL GOAL SETTING

- Stretch but realistic
- Full board buy-in
- Reasonable but efficient timeline
- Failure is not an option
- Hope is not a strategy

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

ANNUAL FUND DURING A CAMPAIGN

- The annual fund exists before, during, and after the campaign
- Barometer for health
- A good campaign will boost annual fund giving post-campaign
- Double ask

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

MAJOR GIFTS PROGRAM GROWTH



In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: PLANNING PHASE

NON-MONETARY GOALS

- ✓ Improved communication
- ✓ Higher percentage of participation
- ✓ Greater awareness in community
- ✓ Improved culture of philanthropy beyond campaign
- ✓ More mission buy-in, greater awareness
- ✓ Education about planned giving
- ✓ Increase the capacity of your development office
- ✓ New donors increase existing donor engagement
- ✓ Growth in mid-level giving

In Partnership With:



Develop the Case for Support



**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: CASE FOR SUPPORT

DEVELOP CASE FOR SUPPORT

- Casts your vision
- Emotionally compelling
- Brings your priorities to life
- Demonstrates donor opportunity and ROI
- Shows urgency to address the problem now!
- Highlights the benefits to your school and community
- Shows you listened during the campaign study
- Includes graphics, elevations, and renderings
- It's all about the donor!

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: CASE FOR SUPPORT

GUIDELINES FOR AN EFFECTIVE LAYOUT

- Use ample white space for readability
- Use one easy-to-read serif typeface for body copy
- Use bullets and headings to organize the flow of the argument
- Use drawings and charts to convey information and add variety
- Use personal testimonials to add the human touch
- Use long captions with images, charts, and drawings that explain content

In Partnership With:



Recruit the Steering Committee and Campaign Leadership



2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

PURPOSES OF THE CAMPAIGN STEERING COMMITTEE

- Solicit prospects
- Expand the campaign's spheres of influence and affluence
- Bring credibility to the campaign
- Expand staff resources
- Give 30 to 40% of the campaign goal

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

RECRUITING YOUR CAMPAIGN STEERING COMMITTEE

- Must give at least at the same leadership level of the prospects they will be soliciting
- Must be willing to solicit prospects
- Must be willing to attend steering committee meetings
- Should not be a “maverick”
- Should be provided with a job description
- Should be provided with an accurate time commitment

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

RECRUITING YOUR CAMPAIGN STEERING COMMITTEE

- Steering committee members give campaign credibility
- Very intentional and thoughtful
- Must be done collaboratively; address interpersonal and political realities
- Just like gifts, get the most impactful committee members first
 - i.e., campaign chair

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

RECRUITING YOUR CAMPAIGN STEERING COMMITTEE

Campaign steering committee members might also:

- Participate in frequent strategy sessions to guide the campaign and solicitation process.
- Attend solicitor training meetings to help encourage and motivate volunteers.
- Help rate prospects.
- Review and edit proposals, letters, and other campaign materials.
- Make behind-the-scenes contacts to motivate donors.
- Speak about the school and campaign in public forums.

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

CAMPAIGN CHAIR

The leader of a campaign must be willing to:

- Make a generous and early financial commitment.
- Be the public persona for the campaign.
- Help enlist volunteers to serve in key campaign positions.
- Solicit other campaign volunteers and major donor prospects.
- Attend and chair regular steering committee meetings.
- Attend campaign kickoff, cultivation, and celebration events.

In Partnership With:





JOB DESCRIPTION: CAMPAIGN CHAIRS

- Campaign chairs are the campaign's principal leaders, representatives, and spokespeople.
- The chairs should be well known for their effective leadership skills and strong commitment to the school and campaign.
- The job is challenging, demanding, and inspiring. Chairs must have enough time to work on the campaign.
- Campaign chairs are also the primary motivators. Good campaign leaders are responsible, trustworthy, generous, and committed.
- The chairs should be willing to help enlist volunteers.
- The chairs will lead and motivate the campaign executive committee, as well as assure that leadership gifts are secured.





CAMPAIGN CHAIRS: RESPONSIBILITIES

- Set an example for all campaign volunteers through personal commitment and involvement.
- Lead by example in making a leadership gift.
- Publicly endorse and advocate the goals and objectives of the campaign.
- Chair all meetings of the campaign executive committee.
- Assist in recruitment of campaign leadership.





CAMPAIGN CHAIRS: RESPONSIBILITIES

- Assist in identifying leadership gift prospects and making key lead gift solicitations.
- Give priority attention to matters that will yield the greatest philanthropic dollar return.
- Attend special and promotional events.
- Work closely with the executive director and leadership to evaluate progress.





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

CAMPAIGN CHAIRS: TIME COMMITMENT

- Preside at monthly campaign executive committee meetings.
- Assist with lead gift solicitation visits with primary focus during the first 12 months.
- Attend selected leadership, cultivation, and campaign events.
- Schedule one hour per week for campaign strategy and briefing communications.
- Devote an average of 15 hours per month to campaign-related work during the campaign period. The most intensive involvement will be during the lead gift phase.

In Partnership With:

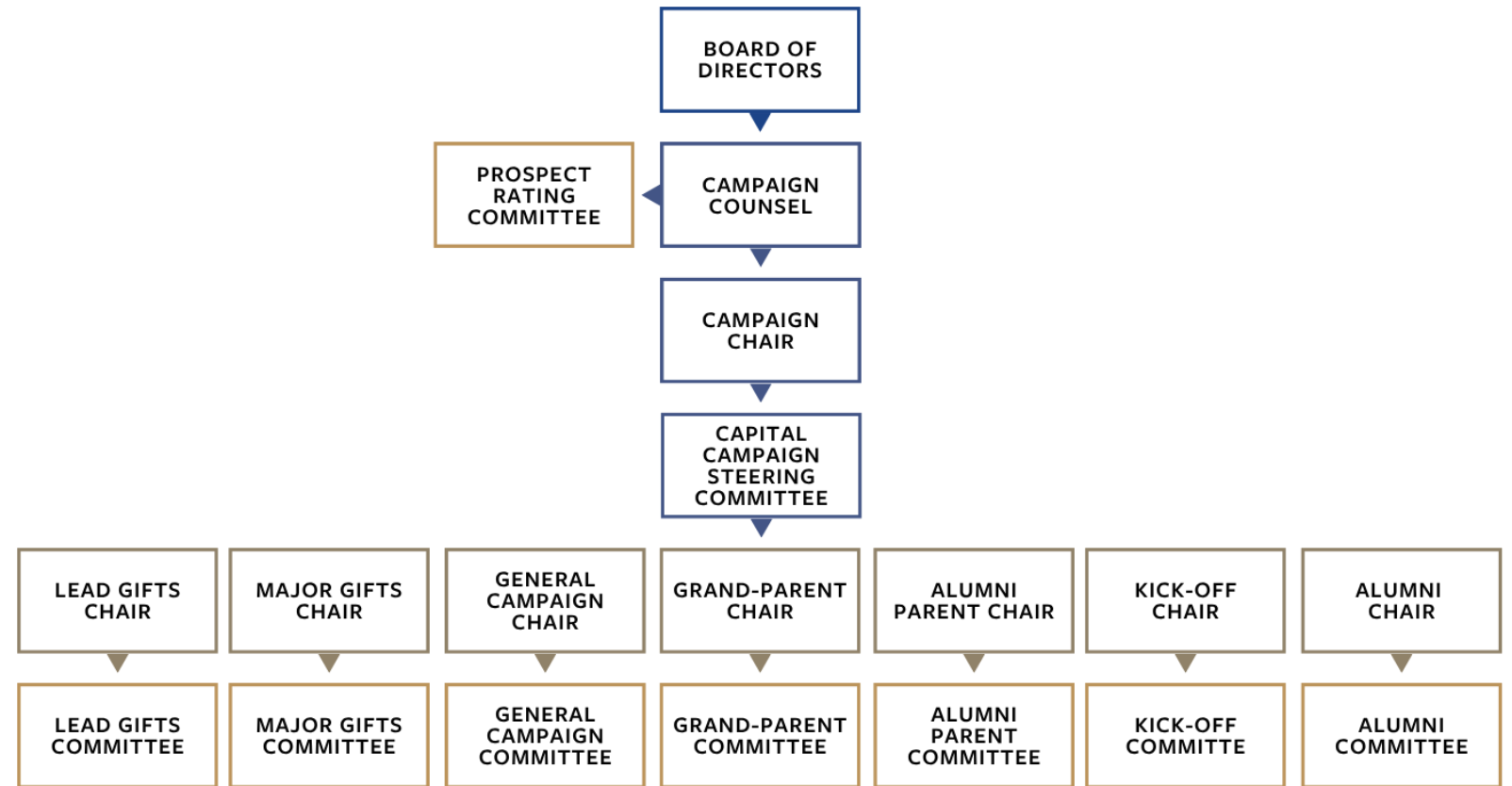




2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

SAMPLE CAMPAIGN FLOW CHART



In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

TEN SUGGESTIONS FOR ENLISTING VOLUNTEERS THE RIGHT WAY

1. Always invite people to do things they are likely to do successfully.
2. Enlist the most powerful and important people first.
3. Provide long horizons between the request and the actual task.
4. Assign a person of similar wealth and position to help enlist a particular candidate.
5. Prepare a list of clearly written expectations before asking anyone to do anything.

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

TEN SUGGESTIONS FOR ENLISTING VOLUNTEERS THE RIGHT WAY

6. Define the end of every project before recruiting people for the beginning of it.
7. Let “no” be an acceptable answer.
8. Break all volunteer activities into small, manageable links that join together to create a longer chain. Consider a 90-day commitment.
9. Celebrate all successes, no matter how small.
10. Don't forget to tell them that it's likely to be fun!

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

TEN SUGGESTIONS FOR ENLISTING VOLUNTEERS THE RIGHT WAY

- It is not uncommon for a board to believe that hiring a consultant absolves the board from doing any of the work during the campaign.

In Partnership With:





CREATING A POSITIVE ATMOSPHERE

- Make sure every meeting has well-defined, achievable goals and a clean agenda
- Follow each meeting with a cogent summary of assignments made in the meeting
- Be sure that all staff and volunteers are in the loop for every piece of good news
- Find creative ways to keep meetings fresh and compelling
- Be sure meetings start and end on schedule
- Acknowledge work done well at meetings
- Be sure everyone who attends meetings has a chance to play an active role
- Celebrate early and often and in many ways
- Treat campaign volunteers like insiders. They are!
- Model the behavior you wish others to adopt



Finalize Advance and Lead Gift Prospects and Begin Cultivation



2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

INSIDE-OUT APPROACH

- Steering committee and chair(s) are the first solicitations completed during the recruitment process
- 30% + of the total goal should come from your steering committee
- Solicitors cannot ask others to give until they have made their own gift commitment
- The board should be solicited prior to the quiet phase launch
- Expect donors to ask about 100% board participation

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

TOP-TO-BOTTOM APPROACH

- Every donor should feel like their gift helps get the campaign across the finish line
- Start with your largest asks first and work your way down
- Use a waterfall method of cultivation to solicitation and repeat
- Add new qualified prospects as to expand the prospect list

In Partnership With:



Expand the Prospect List



2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

EXPAND THE PROSPECT LIST

- Start with prospects you were not able to interview during the study
- Use past giving, wealth screening, and peer rating to qualify prospects
- Every prospect added to the list must be qualified with a specific ask amount
- Develop a cultivation and solicitation strategy for **every** prospect to be personally solicited
- Bring new prospects to the steering committee for assignment

In Partnership With:



Develop Campaign Policies, Process, and Collateral



2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

GIFT POLICIES AND PROCEDURES

- **Do not underestimate the importance of clear policies**
- Donor recognition and gift acknowledgement
 - Turnaround time
- What will count and what won't?
- Full board approval and buy-in
 - Protects you and your school
- Naming rights policies
- Accurate reporting (i.e., signed pledge cards and outright gifts)
- Set up to receive securities
 - Policy on receiving securities
 - Include estate gifts
- Prepare to accept grants from donor advised funds (DAF grants CAN be made to a campaign)

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: PLANNING PHASE

DONOR RECOGNITION

- A clean and consistent plan
- Celebrates generosity, not wealth
- Donor recognition is not always equitable
- Design your donor recognition plan to fit with your gift chart
- Follow your school's culture
- This plan should be separate from your annual fund

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: PLANNING PHASE

NAMING OPPORTUNITIES

- Should inspire donors to stretch
- Must have clear and consistent pricing that is shared with the donor
- Are a strong motivator for other donors
- Always align donor recognition with the values of your school
- Be creative: go beyond naming buildings and rooms
- Provide naming opportunities for low-level gifts

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

DONOR STEWARDSHIP PLAN

- Stewardship is the genuine appreciation you show to each donor
- Don't confuse stewardship with gift acknowledgement
- Make it personal to the donor
- Do not overpromise and under deliver
- Remember donors are investors – treat them this way

In Partnership With:





ACKNOWLEDGEMENT PROCEDURES

Gifts and pledges of \$100,000+

- Telephone calls from the campaign chair, board chair, and school
- Personalized, hand-written thank you letters from the campaign chair, school, board chair, and solicitor
- Acknowledgement/thank you letter from development office, signed by campaign chair

Gifts and pledges of \$50,000-\$99,999

- Telephone calls from a campaign executive committee member, board chair and school
- Personalized, hand-written thank you letters from a campaign executive committee member, school, and solicitor
- Acknowledgement/thank you letter from development office, signed by campaign chair



Create a Strategic Campaign Communications Plan



2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

COMMUNICATION, MARKETING, AND BRANDING

- Clarifying responsibilities and schedules of communications
 - Thank-you note cards
 - Mailing labels
 - Campaign folders
 - Kickoff invitation
 - Format for an insiders' newsletter
 - Four-six issues of a campaign newsletter
- Design for printing on promotional items
- Celebration invitation
- Direct-mail solicitation piece
- All necessary envelopes
- Identify and leverage all existing communication channels
- Consider establishing new communication channels specifically for the campaign

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PLANNING PHASE

COMMUNICATION, MARKETING, AND BRANDING

- Don't go overboard
- Collateral materials don't raise money
- Mission and vision raise money

In Partnership With:



CAMPAIGN COMMUNICATIONS PLANNING

	QUIET PHASE	CAMPAIGN ANNOUNCEMENT	PUBLIC PHASE	CONCLUSION
AUDIENCES	Insiders Lead-gift prospects	Insiders Lead-gift donors Lead-gift prospects Major-gift prospects General-gift prospects	Insiders Lead-gift donors Major-gift donors General-gift donors All constituencies	Insiders All donors All constituencies Community-at-large Visitors
MESSAGES	Case/vision	Case/vision Donor examples Building Success Gap to goal Celebration	Case/vision More donor examples Closing gap to goal	Vision to reality Donor examples Success D/V recognition Celebration
VEHICLES	Draft case Logo/letterhead Proposal material Staff/Board updates	Campaign brochure Party mementos Campaign video Campaign newsletter	<div> Campaign brochure* Campaign newsletter Regular newsletter Radio/TV spots Newspapers Events </div> <div> Bumper stickers, etc. Lobby displays, etc. Print ads Telephone greeting Member letters </div>	<div> Campaign report Radio/TV spots Newspaper Events Lobby displays Mementos Banners Annual Report </div> <div> Print ads Telephone greeting Member letters Pledge reminder letters Billboards, etc. </div>

*A campaign with a large, expensive brochure may elect to produce a smaller brochure for the public phase of the campaign



WINKLER GROUP

Fueling Your Vision

CAMPAIGN BREAKOUT





CAMPAIGN BREAKOUT

Scenario:

- Develop a name for your campaign.
- Using your gift chart, develop naming opportunities.

You will need:

- A reporter
- Write your campaign name and naming opportunities on flip chart paper



Prepare to Launch the Campaign



2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PREPARING TO LAUNCH

PREPARING TO LAUNCH THE CAMPAIGN

Make a final checklist....

- Steering committee trained and assigned to advance and lead prospects
- Advance and lead prospects cultivated
- Gift proposal packets and campaign collateral ready
- Campaign gift tracking system set up to support the campaign

In Partnership With:





WINKLER GROUP

Fueling Your Vision

PHASE III: QUIET PHASE





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: QUIET PHASE

THE QUIET PHASE EXPLAINED

- The active fundraising phase focused on personal solicitations to raise at least 80% of the campaigns financial goal
- 85%–90% of the campaign goal will come from 10%–15% of donors
- Top 20-30 gifts set the bar for success
- Where campaigns are won or lost
- Inside-out, top-to-bottom approach

In Partnership With:





2025 Advancement
Summit: Capital Campaigns



CAMPAIGN: QUIET PHASE

SAMPLE GIFT CHART

Gift Chart: \$10,000,000

Gift Range	No. of Gifts Required	No. of Prospects Required	Subtotal	Cumulative Total	Cumulative Percentage
\$1,000,000+	1	4	\$1,000,000	\$1,000,000	10%
\$750,000 - \$999,999	1	4	\$750,000	\$1,750,000	18%
\$500,000 - \$749,999	2	8	\$1,000,000	\$2,750,000	28%
\$380,000 - \$499,999	3	12	\$1,140,000	\$3,890,000	39%
\$250,000 - \$379,999	5	20	\$1,250,000	\$5,140,000	51%
\$190,000 - \$249,999	8	32	\$1,520,000	\$6,660,000	67%
\$130,000 - \$189,999	10	40	\$1,300,000	\$7,960,000	80%
\$63,000 - \$129,999	12	48	\$756,000	\$8,716,000	87%
\$25,000 - \$62,999	12	48	\$300,000	\$9,016,000	90%
Under \$25,000	78	314	\$984,000	\$10,000,000	100%
Totals	132	528		\$10,000,000	

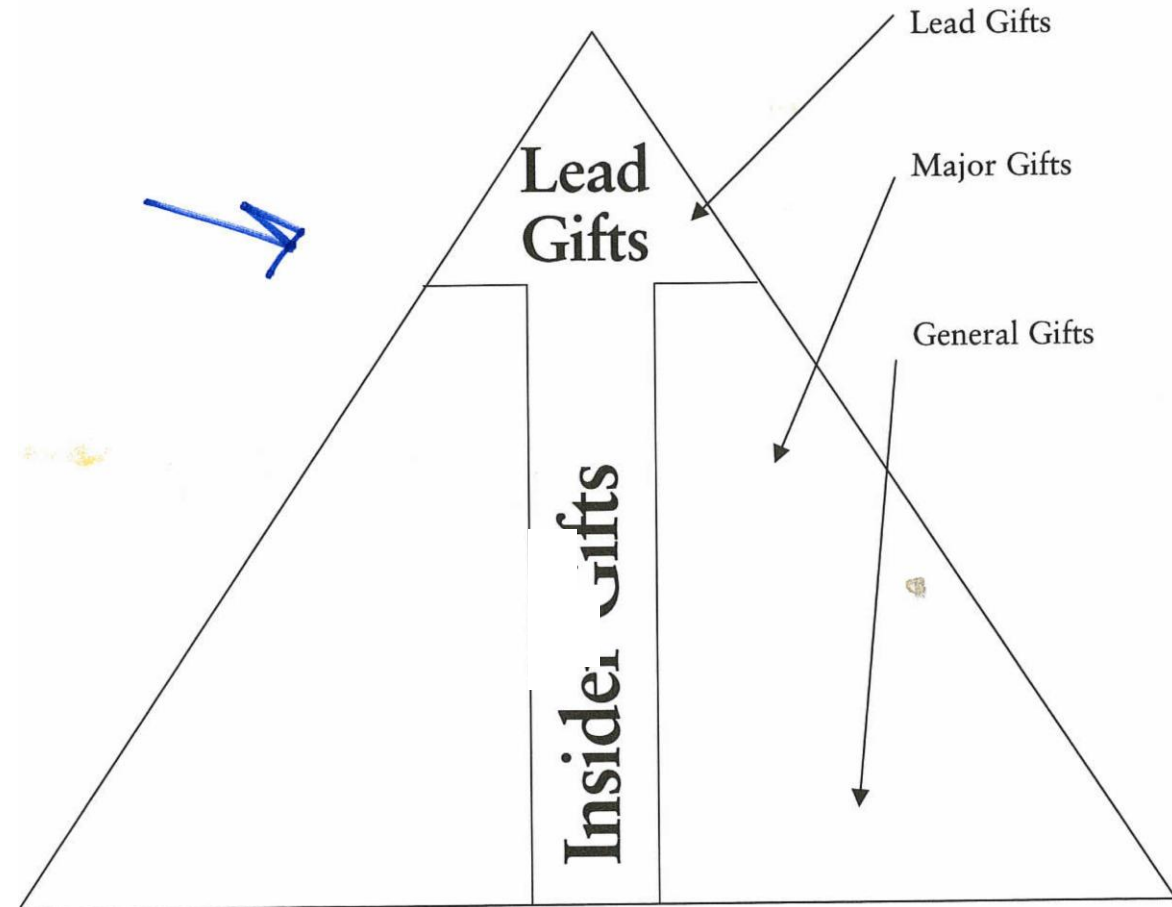




2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: QUIET PHASE

LEAD GIFTS AND INSIDER GIFTS



In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: QUIET PHASE

TOP-DOWN SOLICITING

	No. of Gifts	No. of Prospects	No. of Solicitors	Amt. Solicited	Percent of Total
Lead Gifts					
\$150,000	1	2		\$150,000	
\$75,000	1	2		\$75,000	
\$50,000	2	6		\$100,000	
\$25,000	6	18		\$150,000	
Totals	10	28	7	\$475,000	47%
Major Gifts					
\$75,000	10	32		\$750,000	
\$50,000	20	80		\$1,000,000	
\$25,000	40	160		\$1,000,000	
Totals	70	272	68	\$2,750,000	30%
General Gifts					
\$1,000	80	360		\$80,000	
\$500	160	640		\$80,000	
Totals	240	1000	250	\$160,000	16%

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: QUIET PHASE

START WITH THE BOARD

- Equal sacrifice
- Outsiders will look at board giving
- Increases momentum
- Develop board funding goal
- Organize board solicitation
- 100% participation
- No exceptions
- Board members deserve cultivation

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: QUIET PHASE

ORGANIZING THE BOARD STEP BY STEP

1. Enlist a small (four-to-five) board solicitation committee
2. Develop board solicitation timetable (six-to-eight weeks)
3. Meeting #1: Committee members select prospects
4. Prepare advance letter for each board member
5. Prepare blank statements of intent
6. Meeting #2: Train board solicitors
7. Mail advance letters
8. Solicitation meetings occur
9. Track progress
10. Follow up when needed
11. Assemble report of board giving
12. Report progress and results to board

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: QUIET PHASE

CAMPAIGN STEERING COMMITTEE

- Must be leadership donors
- 30%–40% of campaign goal
- Set the tone for campaign
- Establish early momentum
- Must be willing to solicit
- Campaign chair(s) asked first
- 100% participation

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: QUIET PHASE

LEADERSHIP AND MAJOR GIFTS

- Starts after board, steering committee, and school leadership have been solicited
- Top-to-bottom approach
- Approach prospects noting success to date
- Ask for stretch gifts
- Be creative
- Be adaptable
- Leverage gifts
- Focus on return on investment

EVERY investor in the campaign should feel like their gift will get the campaign across the finish line.

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: QUIET PHASE

CAMPAIGN SOLICITATION PACING

- Well-managed campaigns stay on pace
- Total number of prospects divided by number of asks per week = length of the quiet phase
- You must have at least two times the number of people cultivated at all times, so you have an adequate solicitation pool
- You are always cultivating and soliciting
- Using top-down approach keeps you organized and focused

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: QUIET PHASE

CAMPAIGN SOLICITATION PACING

1

TOTAL NUMBER OF PROSPECTS



2

ASKS PER WEEK



3

NUMBER OF WEEKS IN
QUIET PHASE

In Partnership With:





WINKLER GROUP

Fueling Your Vision

CAMPAIGN BREAKOUT





CAMPAIGN BREAKOUT

Scenario:

- Your campaign is 60% of the way to goal, but activity has stalled—it's been two weeks since solicitors have scheduled an ask.
- What strategies can you use to re-energize your team and regain momentum?

You will need:

- A reporter
- List 3–5 specific strategies your team could use to restart campaign momentum.



The Solicitation Process and the Tools You Need to Succeed as a Solicitor



2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: QUIET PHASE

CAPITAL CAMPAIGN PHRASING

- **Thoughtful** rather than *impulsive*
- **Investment** rather than a *gift*
- **Strategic** rather than *programmatic*
- **Values-based** rather than *duty-based*
- Personal **relationships** rather than *mass marketing*

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: QUIET PHASE

MOTIVATION FOR GIVING

- Emotional and rational investment in the school
- Motivated by great causes and bold plans that affect change
- Benefit to donor: the ability to make a difference and help others achieve success
- Track record of success
- Desire to invest in a winning cause

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: QUIET PHASE

WHY VOLUNTEER SOLICITORS?

- Bring credibility to the ask by investing their time and talent to the cause—a compelling endorsement
- Statistically, they have the most success
- Expand the philanthropic network
- Extend the knowledge base
- Extend staff resources

A peer asking another peer to join them in solving a problem they both deeply care about is the most compelling ask that can be made.

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: QUIET PHASE

“I’M AFRAID TO ASK”

- An invitation, not a sale
- If done properly, donors expect and even look forward to the ask
- People won’t give at a leadership level unless they are asked
- Asking them to support something you personally support

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: QUIET PHASE

SIX STEPS TO A SUCCESSFUL ASK

1. Know your material
2. The solicitation plan
3. The call (prep, script, objections)
4. The conversation and presentation
5. The ask
6. The follow up

In Partnership With:





WINKLER GROUP

Fueling Your Vision

SOLICITATION TRAINING





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

KNOW YOUR MATERIALS

- The case for support
 - The impact of the school
 - The plan and vision for the future
 - The problem and the solution to solve it
- The prospect
 - Giving, interests, affiliations
 - Motivations to stretch
- The ask amount...based on:
 - Giving history
 - Capacity
 - Interest
 - Direct feedback from the donor

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

THE SOLICITATION PLAN

Prepare a written plan of action:

- The purpose of this visit is to ask for a leadership gift
- What are our roles: what will we say, who will ask, what is likely to be the result?
- What are the prospect's interests?
- What do we think the response might be?
- What is my strategy or out?
- What objections can we anticipate?

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: SOLICITATION TRAINING

INVITATION TO MEET

- By this time, the prospect has had several opportunities to say “no”
- You must ask—and receive—permission to solicit a prospect
- Include both spouses
- Make it easy for your prospect to say “yes”

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

THE CALL TO SCHEDULE THE APPOINTMENT TO MEET

- Script the call and practice
- Have your calendar in front of you
- Take a deep breath and stand up
- Smile
- Pick up the phone and make the call
- By this point, the prospect will be expecting this call

In Partnership With:





CALL SCRIPT

Hey Frank, I was calling to follow up with you and Mary after our last visit. I would welcome the opportunity to meet with you and Mary to discuss potential investment in the campaign.

Goal: Schedule a visit

Remember:

- Be brief
- Be prepared for objections and push back





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

OVERCOMING EARLY POTENTIAL OBJECTIONS

- “I can only give you about 5–10 minutes.”
- “I’m not sure it’s a great idea to get together as I’m not really in a position to give right now.”
- “Let’s cut to the chase—just tell me how much you need.”
- “Send me the material in the mail and I’ll send you something.”
- “I already give so much.”

In Partnership With:



**SUCCESS, YOU HAVE
AN APPOINTMENT!**

**Great news—you are
90% of the way to a
successful ask!**



**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: SOLICITATION TRAINING

NEXT STEPS

- Prepare materials for your visit
- Coordinate with your partner
- The conversation
- The presentation
- The ask

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

PREPARATION AND COORDINATION

- Materials to bring:
 - Prospect's information
 - Meeting script
 - Campaign folder
 - Gift proposal
- Practice
 - Rehearse with your partner—determine who will be the lead and walk through the conversation
 - Anticipate objections
 - Practice making the ask and say it out loud several times before your visit

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

MEETING OUTLINE

- Thank the prospect for their time and opportunity to meet
- Small talk
- Get to the point
- Regardless of what they say, thank again for their time
- The out

**The entire meeting should not last longer than 20 min.
You can stay longer only if they invite you to stay longer.**

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: SOLICITATION TRAINING

THE OUT

- You are not asking them to write a check today
- You are asking them to consider an investment in the project
- This is a critical tool in your tool belt
- Your job is to get them to say YES to CONSIDERING
- Use your out when you need it

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: SOLICITATION TRAINING

GET DOWN TO BUSINESS

- We're here because...
 - Explain the project
 - Make the case
 - Explain how investing in this project will make a difference to them
 - Allow time for questions

In Partnership With:





GIVING TESTIMONY

Frank, my wife and I are so passionate about what we will be able to accomplish in this campaign, that after much consideration we are going to commit to giving \$____. You know me pretty well, and you know that gift represents a stretch for us. As a matter of fact, it's the largest gift we've ever made to any organization. That's how much I believe in the project.





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

THE ASK

Mary and Frank, we are grateful for your past support. Because of your generosity over the years we have been able to accomplish _____. This campaign is going to allow us to _____.

Would you consider a leadership gift of \$X each year for the next three years, for a total gift of \$3X?

**...Having asked the question,
what is the next thing you should do?**

In Partnership With:



Putting the Ask to Work

An Exercise



**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: SOLICITATION TRAINING

GET DOWN TO BUSINESS

- We're here because...
 - Explain the project
 - Make the case
 - Explain how investing in this project will make a difference to them
 - Allow time for questions

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

“NOT SURE... NEED TO THINK ABOUT IT”

- Great news—you’ve captured the prospect’s interest
- “Of course you need more time to think this over. Let me ask you...”
- This is the outcome you were hoping for
- The four most common questions
 - Is it the school?
 - Is it the project?
 - Is it the amount?
 - Is it the timing?

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

CIRCLE BACK

- Now that you have addressed and responded to the four most common questions, you may be in a position to close the gift
- If not, set a firm follow-up time within the week

DO NOT LEAVE A PLEDGE FORM

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

OBJECTIONS ARE GOOD FOR THE SOUL

- Talking through objections allows you to probe and talk through concerns with your prospect
- Your job is to resolve the objection and win over the prospect
- You do this by listening and responding to every concern
- A gift at the proper level won't be made until every concern is addressed and satisfied

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

BE READY FOR...

- “I have to talk it over with my spouse.”
- “Leave the material and pledge form with me. I’ll look it over and mail you a gift.”
- “This is a terrible time to ask for a gift. My daughter is getting married, my son just started college.”
- “We can’t possible give that much.”
- “Who told you I should give this much?”
- “We already give to so many nonprofits. I’m just not sure I can add the school to that list.”
- “The stock market has been crazy—this isn’t a good time.”
- “I already support the school—just use that gift.”

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

CIRCLE BACK: THE FOLLOW UP

- Now that you have addressed and responded to their questions or objections, circle back to the ask and set the follow-up.
- Remember: giving them time to think about it was the plan all along; remind them of this.
- Use the funnel method to set the follow-up.

DO NOT LEAVE A PLEDGE FORM

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

WHEN YOU GET A COMMITMENT

- Thank the donor for their belief in and commitment to the school.
- Complete the pledge form with signature.
- **DO NOT LEAVE pledge form with donor.**
- Call development office with great news.
- Thank you note/stewardship protocol plan.

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

WHEN YOU GET A FIRM NO

- Be gracious, in person and in writing.
- If no to this project, gather more info.
- If no to the school, gather objections.

**Remember...some will not give. It's not your failure.
Time to move on to your next successful ask.**

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

RULES FOR ASKING

- Make your own gift first
- Know your prospect
- Listen to what the prospect says
- Emphasize the prospect's interests
- Ask for a **specific** gift amount
- Remain positive and focused
- Counter objections with facts
- Manage the follow-up (pledge card, next appointment, thank you note, reporting results)

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

SOME TIPS...

- Arrange for the appointment in a personal setting
- Never mail the case for support or material. Always make a personal visit
- Make a solicitation with a partner
- Do not mention money until EVERYTHING else has been said
- If a second meeting is necessary, do not leave until a follow-up meeting has been scheduled

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: SOLICITATION TRAINING

COMMON MISTAKES

- Not asking for the gift
- Not asking for a specific amount
- Not asking for a large enough gift
- Talking too much—not listening
- Talking only about the school and not about the interest of the prospect
- Not knowing enough about the prospect
- Not being prepared or no coordination with your partner
- Asking for the gift too soon
- Not listening after the ASK has been made
- Trying to negotiate the amount

In Partnership With:





WINKLER GROUP

Fueling Your Vision

PHASE IV: PUBLIC PHASE





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: PUBLIC PHASE

PUBLIC PHASE

- Determined by dollar goal (at least 85 percent) not a preset date on calendar
- Opportunity for exposure to broader community
- Leverage all communication and media channels
- Use of kickoff committee
- Message that the campaign will be successful
- Launch of community section for campaign:
 - Individual solicitations
 - Direct mail
 - Phone

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PUBLIC PHASE

CAMPAIGN KICKOFF PLANNING OUTLINE

Purpose:

- Energize campaign volunteers
- Obtain press coverage for the campaign and the projects that the campaign will fund
- Recognize the campaign's lead-gift donors

Suggested Attendees:

- Major donors
- Major gifts prospects
- Community leaders
- Campaign volunteers
- Key faculty/staff members

Timing:

- Kickoff date: 80%+ of goal

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PUBLIC PHASE

DIRECT MAIL/EMAIL APPEALS SHOULD BE...

- Clear
- Attractive
- Distinctive
- Compelling
- Eye-catching
- Well-written
- Focused
- Individualized
- Upbeat
- Easy to respond to
- Customized to a specific amount

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**



CAMPAIGN: PUBLIC PHASE
CELEBRATION

- Party, festive
- Thank volunteers, donors, etc.
- Bring closure to the campaign
- Set stage for next campaign





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PUBLIC PHASE

EVALUATION OF THE CAMPAIGN

- 30 days after celebration
- “But” meetings
- Leverage software
- Use data and statistics
 - Total number of donors and total amount raised
 - Total number of solicitations completed
 - Percent of ask amount
 - Decline rate
- Average gift
- Median gift
- Percent of personal, corporate, and foundation gifts
- Percent of participation for leadership as well as percent total campaign amount raised
- Any outstanding prospects to be solicited

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: PUBLIC PHASE

GENERAL VOLUNTEER EVALUATION QUESTIONS

- Q Did you understand what would be expected when you accepted your campaign role?
- Q Did the staff support you in carrying out your tasks?
- Q Overall, was this campaign a positive experience for you?
- Q Do you feel that campaign meetings were well organized and productive?
- Q What would you have needed to carry out your responsibilities more efficiently?

In Partnership With:





GENERAL EVALUATION QUESTIONS

Q Which were the most challenging aspects of your task?

- Enlisting volunteers to help you
- Rating prospects
- Soliciting prospects
- Keeping in touch with other solicitors in your division
- Working with the faculty/staff
- Other

Q What were the most rewarding aspects of your involvement?

- Furthering the school's cause
- Making new friends
- Learning about capital campaigns and fundraising
- Getting recognition and visibility for your work on the campaign
- Other





WINKLER GROUP

Fueling Your Vision

CAMPAIGN BREAKOUT





CAMPAIGN BREAKOUT

Breakout:

- The public phase of your campaign is your chance to build broad community excitement and participation.
- Plan your public phase kickoff event so that you can gain as much momentum as possible for the public phase.

You will need:

- A reporter
- Describe your event, messaging, and whatever else you need.



DONOR RECOGNITION AND STEWARDSHIP



2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: RECOGNITION AND STEWARDSHIP

DONOR RECOGNITION AND STEWARDSHIP

- Genuine appreciation
- Discipline of gratitude
- Ways to say thank you
- Authentic and organic recognition
- Most often overlooked phase
- Planting seeds for post-campaign involvement
- Reap what you sow
- “I only hear from you when you want money”

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: RECOGNITION AND STEWARDSHIP

THE THANK YOU

- Verbal thanks in person
- Verbal thanks over the telephone
- Handwritten thank-you notes
- Typed thank-you notes and letters
- Typed note with personal, handwritten note appended
- Notes from the beneficiaries of the gift
- Notes from the head of school
- The more personalized, the better

In Partnership With:



PLEDGE FULFILLMENT



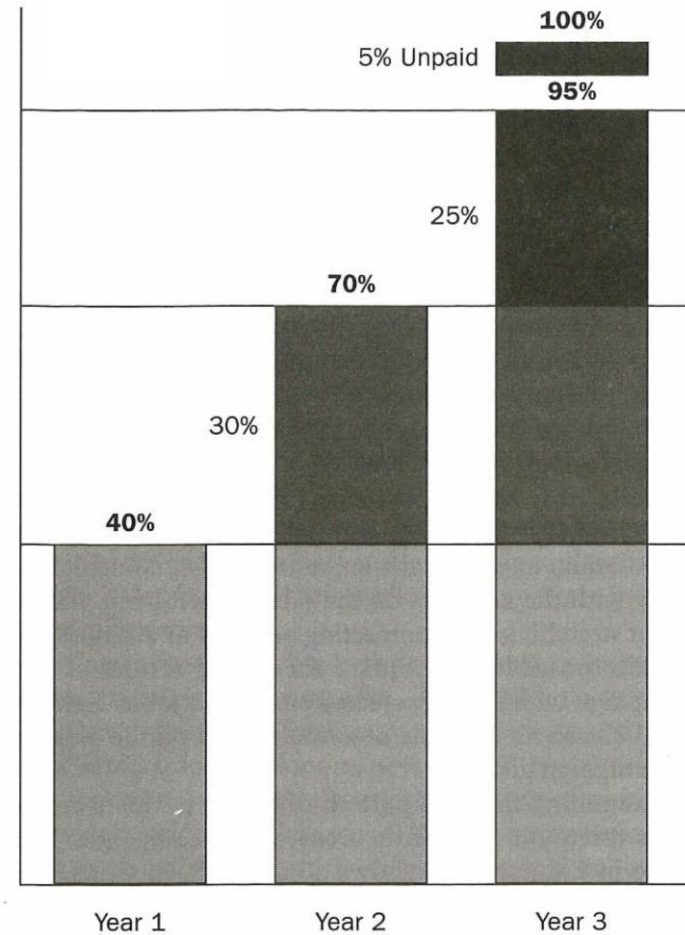
2025 Advancement Summit: Capital Campaigns

In Partnership With:



CAMPAIGN: PLEDGE FULFILLMENT

PLEDGE FULFILLMENT





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: PLEDGE FULFILLMENT

PLEDGE FULFILLMENT

- Utilize software
- Honor donor's requests (i.e., monthly, quarterly, yearly)
- Don't get mad if you don't send reminders
- Be thankful, polite, and proactive when dealing with late or unfulfilled pledge payments
- Make decisions; don't leave things hanging
- Bring closure

In Partnership With:





WINKLER GROUP

Fueling Your Vision

TROUBLESHOOTING AND CAMPAIGN CHALLENGES





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: TROUBLESHOOTING

TROUBLESHOOTING

Campaign challenges fall roughly into seven major categories:

- Dollar goals
- People (volunteer, staff, and donors)
- Specific gifts
- Public relations
- School issues
- Project difficulties
- National calamities or acts of God

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: TROUBLESHOOTING
CASE STUDIES

- Campaign is short \$75k of a \$1.5 million goal. Ten days left to June 1st deadline.
- Campaign is short \$750k of a \$2 million goal. Most donors have been solicited. Campaign to end in two months.
- Campaign chair won't make solicitation calls. Well spoken, high profile, enthusiastic, given generously.
- Head of school doesn't perform. Indicates they will do what is asked and what is necessary but always produces an excuse.
- Lead gift donor makes commitment and then backs out.
- Can't find a campaign chair. All qualified individuals that were asked to serve declined.

In Partnership With:





**2025 Advancement
Summit: Capital Campaigns**

CAMPAIGN: TROUBLESHOOTING **CASE STUDIES**

- Can't recruit enough volunteer solicitors
- Head of school or board chair won't let anyone else solicit donors
- Wealthy board member makes small gift
- Steering committee member(s) not making asks

In Partnership With:





WINKLER GROUP

Fueling Your Vision

ROLE OF THE CONSULTANT





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: ROLE OF CONSULTANT

CAMPAIGN CONSULTANT QUALITIES

- Consultants bring experience to the campaign
- Consultants put problems in perspective
- Consultants provide an outsider's viewpoint
- Consultants take tough stands
- Consultants provide gentle (and not so gentle) nudges
- Consultants address the issue of board giving
- Consultants provide emotional support

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: ROLE OF CONSULTANT

FINDING A CONSULTANT

Questions to ask references:

- What was the school's campaign goal and purpose?
- Was their campaign successful? (did they meet their goal?)
- Who recommended the consultant?
- What is the consultant's working style?
- Were there any problems? If so, how were they resolved?
- How did board members and volunteers react to the consultant?
- Did the consultant do what was expected?
- What were the consultant's strengths and weaknesses?
- Did they produce results?
- Did the consultant go above and beyond the call of duty?

In Partnership With:





2025 Advancement
Summit: Capital Campaigns

CAMPAIGN: ROLE OF CONSULTANT

WHAT CAN'T A CONSULTANT DO?

- Consultants can't change a leopard's spots
- Consultants can't fix your budget
- Consultants can't build your relationships with constituents
- Consultants can't bring a portfolio of \$1 million prospects
- Consultants can't do it by themselves
- Consultants can't take the place of the executive director/CEO/head of school
- Consultants can't change the school's reputation

In Partnership With:





2025 Advancement Summit: Capital Campaigns

WRAP UP REFERENCES

- Sam Ackerman, Caliban Creative
- Association of Fundraising Professionals
- American Association of Fundraising Counsel
- Blackbaud
- Kate Barr
- Sonya Campion
- Indiana University Lilly School of Philanthropy
- Chronicle of Philanthropy
- Corporation for National & Community Service
- Cygnus Applied Research
- Giving USA Foundation
- GuideStar
- Harvesting Gifts, Camden Diocese
- Lawrence Henze, Target Analysis
- Simone Joyaux, Strategic fund development
- Robert Schwartzberg
- The Collins Group
- Andrea Kihlstedt, *Capital Campaign Strategies that Work*
- William C. Krueger
- Major donors the Winkler Group has interviewed
- National Center for Nonprofit Boards
- Nonprofit Research Collaborative
- North Shore League





WHERE TO GO NEXT? **RESOURCES**

- For exploration on trends affecting independent schools and the sector at large, sign up for our Resources Hub at:
winklergroup.com/resources-and-events/
- Connect with one of our experts to discuss your school's fundraising needs:
 - Jim Bush jbush@winklergroup.com
 - Jessica Browning jbrowning@winklergroup.com





WINKLER GROUP
Fueling Your Vision

Q&A





WINKLER GROUP

Fueling Your Vision

THANK YOU!

