

SPECIAL REPORT

Rethinking Capital Campaigns

Welcome to this special section on capital campaigns. In the past, organizations typically conducted a capital campaign once every ten or twenty years. These days, campaigns seem to be happening more frequently. Not only are more small organizations doing them, but for some organizations, as soon as one campaign winds down, the next one begins. For this section, we have gathered new ideas and practices in capital campaign fundraising, as well as some wonderful stories from the field.

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- The Power of Radical Commitment for a Wildly Successful Capital Campaign

Thank you for this opportunity to share with you some of the exciting changes taking place in capital campaign fundraising. Feel free to contact us with your campaign stories or questions at amy@CapitalCampaignToolkit.com or andrea@CapitalCampaignToolkit.com.



About the Authors: Amy Eisenstein, ACFRE, and Andrea Kihlstedt are well-known authors and speakers on fundraising. Amy has authored several books on fundraising. Andrea is the author of Capital Campaign: Strategies That Work, Fourth Edition, in addition to several other books. Together, they created the Capital Campaign Toolkit (capitalcampaigntoolkit.com).

The Future of Capital Campaigns: Four Trends You Need to Know

By Amy Eisenstein and Andrea Kihlstedt

Capital campaign fundraising is on the brink of an irrevocable and irreversible change. For the first time since the inception of capital campaigns more than a century ago, organizations can get access to high-quality expertise and information in new, more efficient, and effective ways.

The change we are witnessing is part of a larger transformational shift making high-quality professional expertise available at a fraction of the cost. Whether legal, medical, accounting, or capital campaigns, expertise is no longer held by a select group of experts who offer it up in high-priced hourly bits. With platforms like LegalZoom, WebMD, TurboTax, and the Capital Campaign Toolkit, new internet systems and applications are making it possible for people to get the expertise, formerly held by professionals, easily and inexpensively.

In their highly acclaimed book, *The Future of the Professions*, Richard Susskind and Daniel Susskind argue that as the expert information of professionals becomes available online, prices become lower, information is of a higher quality, practices are more transparent, and the best information and expert advice is available to many. They assert that “today’s professions should and will be displaced by feasible alternatives” made possible by new internet technologies.

The field of capital campaigns, long the purview of high-priced professionals, is undergoing the same changes, enabled by the same new opportunities and by other shifts taking place in the way that fundraising is conducted.

The new opportunities for accessing capital campaign expertise are the direct result of four major trends in the field, all doing their part to shift the way organizations use consultants for their capital campaigns.

1. FUNDRAISING HAS BECOME PROFESSIONALIZED.

Ten years ago, it wasn’t possible to “major” in fundraising, much less get a master’s degree in it. Now people can get

excellent fundraising training both in person and online through hundreds of programs¹ in the United States alone.

For the first time, fundraisers are being trained to be fundraisers. They have access to a high-quality, professional body of knowledge. As a result, a select group of seasoned consultants are no longer the only ones holding the knowledge of effective fundraising.

In addition, there’s more research and data on which to base decisions. Best practices are being confirmed or falling by the wayside. Technology is helping lead the way with data collection, remote learning opportunities, and more.

2. STAFF AND VOLUNTEERS HAVE ACCESS TO ADVANCED EXPERTISE THROUGH COACHING AND ONLINE RESOURCES.

During the past decade, coaching has moved from the exception to the norm. Executive coaches, life coaches, and personal trainers are common. And a growing percentage of that coaching is being done virtually by phone or internet rather than in person.

The acceptance of virtual coaching as a way to gain expertise and guidance makes virtual capital campaign coaching a viable alternative to on-site campaign coaching consultants. Many of our campaign consultant colleagues are structuring more of their client meetings via conference calls and video chats. And this trend will continue to grow as the technology becomes even better and people become even more comfortable using it.

In addition, executive directors and development directors have easy access to topflight webinars and online material about capital campaigns. Recently, an organization we work with told us that they had used a recorded webinar to educate their board members about the upcoming campaign. They used it as the basis for a discussion of the campaign at a board meeting.

Campaign Phases



3. HIGH-LEVEL VOLUNTEERS ARE ABLE TO COMMUNICATE MORE EASILY.

Roadblocks to communication have been toppled by technology. We are able to connect with people on a variety of forums—email, text, video chat, instant message, social media, and countless apps. Today, it is easy and convenient for donors, stakeholders, and consultants to be involved virtually.

As the multiplex of communication continues to evolve, it's possible to involve more donors and volunteers. Online collaboration tools like Zoom, Google Docs, Dropbox, and others make it easy to meet and work in remote offices. People can share information and comment on and edit documents in real time in the cloud using the multitude of devices we now carry. What used to require time-intensive, in-person meetings can now be accomplished virtually, opening the door to the possibility of involving more donors and volunteers.

4. CONSULTANTS' ROLES HAVE CHANGED.

Capital campaign consulting is one of many professions that is undergoing change. Information that has been tightly held by consultants for decades is now becoming available through the internet. With platforms like the Capital Campaign Toolkit, organizations can look behind the curtain and access the documents, spreadsheets, and advice they need for their capital campaigns.

As a result, consultants will function more as partners than as the holders of privileged information only available through them. They will work more

collaboratively with their clients in adapting the material to fit specific situations.

Consultants will no longer dispense privileged information. But they will play important roles as coaches, guides, and trainers during these big and important fundraising campaigns.

THESE TRENDS PUT YOU IN THE DRIVER'S SEAT

When expert information is not broadly available to the people who need it, the premiums they must pay to get access and guidance are high. And so it has been with the capital campaign world for decades.

But now, the inevitable shift is taking place. Expert information can no longer be held tight by consultants. As a result, both organizations and consultants are shifting the way they are doing business.

We believe that these changes are overdue and will greatly benefit organizations and consultants. Organizations, on the one hand, will be able to spend less on consulting fees for their capital campaigns and still get the expertise and support they need to be successful. Consultants, on the other hand, can help a great many more organizations in ways that are far more efficient and effective.

Don't be satisfied with old models. Seek out consultants who will work with you as well as encourage you to take advantage of the high-quality information and expertise now readily available. 

¹ topnonprofits.com/lists/100-nonprofit-management-degrees-by-state/

Ask the Campaign Expert

By Amy Eisenstein and Andrea Kihlstedt

After working on dozens of campaigns, certain patterns become obvious. However, if you've only experienced one or two, or if you've never done one, campaigns can seem mysterious. We asked campaign experts to share some campaign "truths" they've learned over the years to help demystify the process. Here's what they told us.

1. HOW DO YOU KNOW IF AN ORGANIZATION IS READY FOR A CAPITAL CAMPAIGN?

All the consultants we asked told us that they look for staff and leadership to have a clearly articulated mission and vision for how the campaign fits into the overall organizational mission. They need to be able to tell a compelling story about how the campaign will transform the organization and the people it serves.

The consultants also expect an organization to have an overall plan for the campaign. That includes things like how it will "staff up" for a campaign, as well as a campaign budget and timeline. Of course, the organization doesn't need a complete plan, but it should have a general and realistic sense of where it wants to go and how it might get there.

On budgeting:

"It's important to remember that a great deal of money will be spent in getting ready for the campaign before any cash actually comes in. I want to know if the client has sufficient cash on hand to pay for a feasibility study, donor and prospect cultivation, materials, consultants' fees, additional staff, etc.," says Cassandra George Ramos, of Wind and Water Consulting.

On staffing:

"The key staff (the CEO and the vice president of development) should commit to remaining with the organization for the term of the campaign. Since they are often the keepers of the vision and the donor relationships, it gets very difficult to run a successful

capital campaign if these key positions experience turnover," says Xan Blake, of The Blake Partnership.

On donors:

"The first question I ask an organization is 'Do [you] have a sufficient number of prospects with capacity and inclination?' I look for roughly 10 donors who will contribute 50 percent of the money in a capital campaign. Given that it takes four to five prospects to yield one donor, I expect a successful client to have 40–50 prospects that have the capacity and inclination (determined through an assessment of the donor relationships, wealth screening, giving history, etc.) to make a leadership gift," Ramos says.

2. WHAT ARE SOME CHARACTERISTICS YOU LOOK FOR IN A CAMPAIGN CHAIR?

All the consultants we asked agreed that campaign chairs need the following (in no particular order):

1. personal commitment to the project
2. financial capacity to make a significant gift (not necessarily the lead gift)
3. follow-through ("do what they say they'll do")
4. enthusiasm, optimism, and the capacity to be motivational, a team player, and a leader
5. a willingness to share the vision with others and ask them to join in

"These characteristics do not always present in the same person, which is why co-chairs are often useful," says Peter Heller, of the Heller Fundraising Group.

3. WHAT ARE THE THREE MOST COMMON CHALLENGES ORGANIZATIONS FACE WHEN GETTING READY FOR A CAMPAIGN?

There are many challenges organizations face in getting ready for a campaign. Our experts boiled it down to two key categories.

Lack of Experience

A lack of experience leads to anxiety and fear, which often make people too timid when they set their campaign goals. A lack of experience will impact how you establish a plan and create a budget and timeline. It also may influence how you communicate the case for support to donors and community members.

According to Blake, “The anxiety and fear that can come with launching such a significant fundraising effort is often a major challenge. Most organizations run campaigns about once a decade or less. Therefore, the staff in place at the time a capital campaign is being considered is often not the same staff that ran the last campaign, so it is very difficult to feel confident in knowing where to start and how to be successful.”

One of the most important things to do when considering a campaign is to involve board members, key community leaders, and organizational supporters early in the planning process. Be sure to listen carefully to their feedback and incorporate it into the case for support and campaign plan.

No Cultivated Major Donors

Amy Varga, of The Varga Group, says it’s important for organizations “to face the realities of not having invested enough in developing their relationships with their donors over the years. They often want to take relationships that have been modestly attended to and go from there to major-gift status overnight.”

One thing you can do to help get ready is create a gift range chart and corresponding depth chart, listing the likely prospects for each giving level. This process will help you determine whether you have the donor base to support the campaign goal you’re looking to achieve.

NEXT STEPS FOR YOU

Here’s a list of the things experts recommend you do before launching a capital campaign:

1. Develop a draft case for support, a vision for your campaign.
2. Get your board on board.
3. Identify potential lead donors.
4. Identify a campaign chair or co-chairs.
5. Create a general campaign plan, including a budget and timeline.
6. Identify and plan for additional staffing needs.

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Affordable and Effective: The New Role of Campaign Consultants

By Amy Eisenstein

Virtually no development directors have extensive experience leading capital campaigns. That's because most organizations begin campaigns only once every 10 or 20 years, so even seasoned, longtime development staffers have minimal experience planning and running campaigns from A to Z.

Since campaigns are such high-stakes fundraising endeavors, few board or staff members feel confident “winging it.” And, until recently, the information needed for leading successful capital campaigns had not been readily available to development professionals.

As a result, organizations have relied extensively on experienced consultants to guide them through campaigns from start to finish. And even though the cost of engaging a full-service consulting firm is high, when looked at relative to the amount that can be raised through a campaign, a consultant has seemed like a good investment.

But now, with a massive shift that is taking place in the way people communicate and access information, it's wise to take a closer look at capital campaign consultants and determine what you need them for and what you might do on your own.

THE OLD CONSULTING MODEL

In the traditional model, capital campaign consultants guide organizations through the entire campaign process. Consultants are on-site frequently, attend meetings, and advise staff and campaign leaders in person. They spend full days on site, sometimes several days per month. Some consulting firms even place staff members full time in the development office to manage the campaign.

NEW, LESS COSTLY CONSULTING MODELS

But now, with more organizations doing campaigns—and doing them more frequently—some organizations don't find it necessary to hire a full-service campaign consultant. With more experienced staff members, organizations are reconsidering just what they need an outside consultant for and what they can do themselves.

Not only are organizations rethinking their practices but consultants are also changing the way they do business to take advantage of the easy and effective ways of communicating virtually. Today, there are still some aspects of the work that require consultants to be in attendance, but much of what they do can be handled virtually through conference calls and video conferencing.

Considering the costs of time and travel, changing the consulting model can significantly reduce campaign costs.

HOW YOU CAN BENEFIT FROM “A LA CARTE” CAMPAIGN CONSULTING

A host of new technologies, information access, and sharing options are now available to you for your capital campaign. In addition to virtual meetings, you can collaborate on and share documents, get excellent up-to-date information and examples, and have easy access to well-organized, professional information.

Consider using a consultant as a coach or guide, instead of having them run your entire campaign from start to finish.

As a result, rather than relying entirely on a full-service campaign consultant, you can pick and choose where an outside capital campaign consultant will be most helpful. You can use consultants on an “a la carte” basis, in which you contract for the specific aspects of the work where their expert status will make the biggest difference, and in areas where you don’t have enough in-house experience.

You should consider, for example, using outside consultants for:

- feasibility studies
- developing a case for support
- solicitation training

These three aspects of a campaign are difficult to handle in-house. Experience and outside objectivity can make a huge difference in the results.

You might also work with a consultant as a coach or guide through an ongoing series of video or conference calls. As outside experts, they may be able to cut through some of the political complexities at your organization. Not only that, they can help you stay on track as well as provide reassurance and confidence that you are headed in the right direction.

Brian Holmes, CEO of Xponential, Australia’s leading capital campaign firm, says, “We’re changing the way we work with organizations on capital campaigns, taking full advantage of the new technologies to make sure our clients get the best expertise most efficiently.”

“DO-IT-YOURSELF” SAVES YOU TIME AND MONEY

DIY (do-it-yourself) is all the rage these days. People are getting the information they need for many areas of their work and personal lives from a variety of sources. From self-diagnosis on WebMD to tax preparation on TurboTax and even creating legal documents with LegalZoom, you are likely to first go to the web for the information and expertise you need. It’s often faster and almost always less expensive than hiring a professional.

Now, the information and materials you need for a capital campaign are also available online. And in addition to the myriad of tools and resources on the web, there’s now a streamlined, step-by-step service to help you conduct a campaign with you in the driver’s seat.

Over the past year, I worked with campaign expert Andrea Kihlstedt to create a comprehensive online toolbox for capital campaigns. The Capital Campaign Toolkit is the first all-inclusive capital campaign online resource that was specifically designed with the DIY trend in mind. It serves as a road map and guide for people leading capital campaigns. It also provides all the tools, templates, worksheets, timelines, and resources you’ll need for your campaign.

HOW TO APPLY A MIX-AND-MATCH APPROACH TO YOUR CAPITAL CAMPAIGN

You might think of a capital campaign as your organization’s Mount Everest. You would never attempt a climb without a map, the right tools, and probably a guide.

The Capital Campaign Toolkit doesn’t replace the need for consultants, but it does put you in control of your own capital campaign. Add to that outside consultants when you need them, and you’ll have an efficient, cost-effective way to get the materials and guidance you need for a successful campaign.

To learn more about how this mix-and-match model could be the perfect fit for your next capital campaign, visit capitalcampaigntoolkit.com.

YES, YOU SHOULD LEAD YOUR CAPITAL CAMPAIGN TO SUCCESS

You are the culture of your organization. You know your donors. You should be in the driver’s seat. When it comes to leading a capital campaign, you simply need the confidence to move forward and the ability to say where and when you need outside expertise.

Too often, organizations put their campaigns in the hands of strangers. While consultants bring years of experience and expertise to many aspects of a campaign, they don’t live and breathe your mission the way you do.

Use consultants where and when you need them for the outside expertise they have. Consider using a consultant as a coach or guide, instead of having them run your entire campaign from start to finish. This is your campaign. You’ve got this! 

Data-Driven Fundraising with Steve MacLaughlin of Blackbaud and Ross Hendrickson of Bloomerang

By Ken Jones

Is it me or are there a lot of organizations doing campaigns right now? A successful campaign often happens when an organization focuses on supporters with a strong pre-existing connection to the organization.

However, many organizations lack established relationships with their key supporters or are unaware of them. Generating a list of potential campaign supporters is the most important part of campaign planning and a struggle for too many organizations. For organizations that lack established relationships with their key supporters or are unaware of them, creating a data-driven fundraising culture is the first step in successfully planning for a future campaign.

In my view, there are three pillars to a data-driven fundraising culture. The first pillar is the availability of supporter data that is accurate, comprehensive, and usable. The second pillar is a rigorous environment where fundraising results and supporter behavior are

constantly questioned, analyzed, and probed. The third and most elusive pillar is the infrastructure that enables a thoughtful combination of data from varied sources, revealing patterns and trends that will inform the organization's approach to boost revenue and strengthen relationships. External intelligence often drives this third "big data" pillar.

An organization with a data-driven fundraising culture is often an organization powered by technology. To learn more about our sector's journey to change cultures to be more data-driven, I was excited to have the chance to have **Steve MacLaughlin**, Vice President of Data & Analytics at **Blackbaud** and **Ross Hendrickson**, Co-Founder & CEO at **Bloomerang** weigh in with their

Do you think nonprofits that are less data-driven raise less money than those that are more data-driven? Why?

MacLaughlin: Data-driven organizations perform better than those that are not data-driven. And by that, I mean the entire organization, not just the fundraising results. This is about how the fundraising, grants management, fee-for-service, programs, advocacy, operations, engagement, communication, and everything in between boost the overall performance of the entire nonprofit by being more data-driven. The simple test is to take two people within the organization and provide one of them with data-informed insights and give the other person nothing. Which professional is likely to achieve better results in the long term? Now apply that across the entire organization.

Hendrickson: No. The nonprofits that raise the most money are the ones that build relationships with supporters. They make phone calls and schedule in-person visits. When looking at our data, we see an eight-point increase in supporter retention for organizations that have meaningful one-on-one interactions with supporters compared to ones that do not. Nonprofits can and should use data to help influence which likely supporters to engage with and when, but not at the expense of picking up the phone or speaking with a supporter face-to-face.

What mistakes do organizations make in using data to try to find supporters?

MacLaughlin: The biggest mistake is not using any data at all. This is followed by using the wrong data. Then there is the mistake of not using the right data at the right time with the right supporters.

Hendrickson: Just because someone has the capability to give an amount determined by data doesn't mean the relationship is there to justify that ask. Some mistakes are in trusting the data too much—relying on the data and assuming you don't have to do the basics of building relationships.

What does “big data” look like for the small nonprofit? Why should data even be on their radar?

MacLaughlin: I would argue that data is more important to a smaller nonprofit than a large one. Let's use this fundraising example: If a larger nonprofit that raises \$50 million per year misses out on a gift opportunity of \$100,000, then it's not a major impact. If an organization that raises \$1 million a year misses out on that same \$100,000 gift opportunity, then it can have a very big impact.

Hendrickson: Small nonprofits need to know what the trends are more than bigger organizations. Smaller organizations can benefit from looking at trends in aggregate across other organizations within a similar space. It may be as simple as knowing why some supporters lapsed or increased or decreased. That might start a conversation around the organizational process changes needed.

thoughts about harnessing data to drive results for nonprofits. The goal was to learn how the thought leaders at the top fundraising technology firms think about data, because they shape how many nonprofit organizations apply it.

I started by asking them a simple question: How can we get more nonprofits on board with a data-driven fundraising approach? Hendrickson hopes that as more organizations benefit from a data-driven approach, their success will inspire others to join in. “As early adopters [of data-collecting software solutions] tell stories, other people will see the value of it,” he says.

MacLaughlin sees a need for tactical changes in outdated fundraising practices that were developed before today's systems and computerized analytics were available: “We're going to need changes to leadership and culture to shift our focus from decisions driven only by opinions to more data-informed decisions.”

CONCLUSION: THE ART AND SCIENCE OF DATA

Having the right data, and the ability to analyze it, is the science. The art of fundraising is knowing how to use the data to make strategic decisions that help supporters become more invested in the nonprofit organizations

they give to. “Are we using these insights to focus on recurring giving or to change our communication with supporters? Are we engaging in the appropriate ways with midlevel supporters to build those relationships over time?” MacLaughlin asks.

“Data provides liberation from the fear that we can't change,” says Hendrickson. An organization that makes a change based on the information it collects can rest easy knowing that the data will continue to inform decisions. “You've got to write it down and track the data to know if it made a change for you or not. Keep iterating,” says Hendrickson.

Ultimately, a campaign is a tactic to mobilize supporters, grow revenue, and firmly position an organization for the future. Employing the three pillars of a data-driven fundraising culture long before a campaign should help your organization identify and prioritize the key relationships that need to be nurtured well in advance of a campaign solicitation. 



Ken Jones is a thinker, entrepreneur, community advocate, and radio personality. He is the co-founder of Above Goal, a technology company that specializes in fundraising strategy. Ken is a recovering capital campaign consultant.

Six Important Lessons Learned About Capital Campaigns

By Lisa Fitzgerald Slinkard

Capital campaigns are built on a clear vision of what's ahead. And St. Anne's Episcopal School in Delaware used the question of what the future looked like as a way of engaging their most important stakeholders.

In 2015, as the school was approaching its 15th anniversary, Head of School Peter Thayer, trustees, and staff asked, "What will the next 15 years look like for our school?"

They conducted a series of conversations with their nearest and dearest donors about a campaign and its priorities, even though the ideas were still evolving. They knew they wanted to support and retain their excellent faculty, keep their doors open to talented students, and stretch students academically, and they wondered if they would be able to raise the money to build a new music room too.

They discussed two scenarios—building or no building—presenting each idea as a possibility. They hosted small discussion groups of parents, grandparents, and community members. They also spoke with some donors individually. And they had an important, early conversation with a local foundation that could possibly provide a significant first major gift.

After their initial conversations with donors, they hired campaign consultant Xan Blake of The Blake Partnership to conduct a feasibility study. In the study, they tested a goal of \$1.6 million. Blake spoke with many of the donors who had participated in the planning process. The results were encouraging, and the campaign took off.

When all was said and done, they raised \$2.44 million and were able to create a new multipurpose room and raise money for programs and scholarships, as well as launch a legacy gift program.

The board and campaign committee ended the campaign on a high, excited that their hard work and purpose had been so successful.



SIX TIPS ABOUT CAPITAL CAMPAIGNS FROM LISA SLINKARD, DEVELOPMENT DIRECTOR AT ST. ANNE'S EPISCOPAL SCHOOL:

1. Engage in Pre-Campaign Planning: I cannot stress enough the importance of pre-campaign planning. Start engaging donors way before you do a feasibility study. If we had not had conversations with donors about our vision and priorities early in our planning process, these donors would have learned about the campaign for the first time during their feasibility study interview. They might have been offended that we had not included them in the conversation earlier. They had valuable ideas to share in shaping our plans.

2. Dream Big and Ask for What You Need: In planning for a campaign, don't be afraid to ask for what you need most and to dream big. The worst-case scenario would be to spend your and your volunteers' time and energy on your campaign and then at the end realize you left out an important priority for your organization.

3. Matching Gift Challenges Work: Nothing motivates your community more than a matching gift challenge with a deadline. We had four matching gift challenges throughout the campaign. The first two challenges were directed to our board and campaign committee to launch the campaign, one was directed to grandparents from a fellow grandparent, and the final commitment was from a trustee asking other trustees to consider a second gift to get us to our goal.

4. Engage Donors in Your Campaign: Never underestimate the cultivating effect of a donor being a volunteer on a committee. And, such a donor/volunteer is most likely to make a second gift commitment to get you over the finish line because they are deeply invested in the campaign's success.

5. Ask for Legacy Gifts: Capital campaigns are a great time to ask for legacy gifts. In conversations with donors, it was very natural to ask them to consider a "forever" gift that would leave a legacy at a school they loved. We learned that while we are a young school, many donors had

already included St. Anne's in their estate plans or would consider creating a legacy gift—if we just asked them.

6. Campaigns Are For Impact: We embraced the Engagement Tool model of Nick Fellers (co-founder of For Impact). We created a donor engagement tool to use in face-to-face meetings with donors to ask their permission to engage in each level of the conversation. It also helped us ask donors to consider supporting us in three ways (today, tomorrow, and forever [through a planned gift]). 



Lisa Fitzgerald Slinkard is a certified fundraising executive who has been working in the nonprofit sector since 1994, serving such diverse organizations as Public Broadcasting, the Corporation for National Service AmeriCorps Program, the Episcopal Church, and independent schools. She is passionate about philanthropy, the arts, and providing access to quality education for all.

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Big Apple Greeter Launches a Bequest Challenge Campaign

By Andrea Kihlstedt



Photo by David F. Ross.

Not enough time to work on planned giving? Does it slip to the bottom of your to-do list because you know the money isn't likely to count toward this year's fundraising numbers?

With the help of philanthropist Bob Ross, Big Apple Greeter in New York City has found a way to make planned giving have immediate fundraising results.

Big Apple Greeter is a small organization that pairs volunteer greeters with people from all over the world who visit New York City. Greeters share their passion for the city with visitors for a few hours, for free, giving them a unique, personal experience.

Bob Ross loves being a Big Apple Greeter. So last year, he found a special way to help with the group's fundraising, launching a special campaign to encourage volunteer Greeters to put the organization in their wills.

Bob offered to write a check for \$500 to Big Apple Greeter every time a donor put the organization in their will. With this simple offer, Bob made planned giving have immediate cash return that will count toward the current year's fundraising goals.

Bob wanted to make it as simple as possible. The terms of his challenge are easy: "The Janet Ross Fund will immediately contribute \$500 to Big Apple Greeter when you or anyone you know makes us a beneficiary

in [a] will." All a donor needs to do is send Big Apple Greeter a pledge form indicating their commitment.

Big Apple Greeter welcomed the idea. They started small, inviting their board members to participate. Then they sent an email to their "family" of 300 volunteer Greeters, inviting them to take part in the challenge.

In the first month, they got 23 responses. Those early responses generated \$11,500 from the Janet Ross Fund for the operating budget. Though the long-term income from the bequests is harder to calculate, if the bequest commitments average \$25,000 each, these early responses will amount to more than \$500,000 in longer-term gifts.

Alicia Pierro, executive director of Big Apple Greeter, knows that the early responses are just "the tip of the iceberg." Big Apple Greeter has long and strong relationships with its volunteers, and she's confident that people will want to participate in Bob's bequest giving challenge.

Bob is eager to get even more return on his philanthropic investment. He believes that people who put Big Apple Greeter in their wills will be more likely to give in other ways. He plans to encourage each participant in his bequest challenge to become an annual donor as well.

Bob became a full-time philanthropist when his wife, Janet, died of brain cancer. They had managed their money carefully, and Bob's philanthropy now follows that pattern. He does everything he can to make his philanthropic investments have as big an impact as possible. That's why he has become so committed to seeding the bequest challenge fund. 



Photo by Sherry Ott.

The Power of Radical Commitment for a Wildly Successful Capital Campaign

By Andrea Kihlstedt

I walked into the office of Alison Kear, executive director of Covenant House Alaska (CHA). She was dialing the phone. As she waited for an answer, she grinned at me, a grin that said, “Watch this.”

I was about to witness the extreme persistence and radical commitment that fueled the capital campaign that funded the new building for Covenant House Alaska.

When the person she was calling picked up, Alison introduced herself and explained that one of the children at Covenant House Alaska needed help immediately.

“I’m sorry,” the woman on the line said. “We can’t help you now.” Alison gently asked to speak with the woman’s manager. Once again, she got rebuffed. The manager wasn’t available.

Alison continued: “I’ll tell you what,” she said, in a friendly voice, “I’m going to call you every 15 minutes until you connect me with your manager. We’ve got a problem here that needs to be solved today.”

I had the good fortune to advise the capital campaign that raised more than \$25,000,000 for CHA’s new building. Alison’s commitment and persistence set the stage for that campaign, but here are 10 more reasons it was so successful.

1. **Early Donor Engagement:** Long before the campaign, CHA had done an excellent job of establishing and building relationships with foundations, businesses, and individuals throughout the community. These relationships had been carefully nurtured. So when it came time for a campaign, Alison and her team could open the right doors.
2. **Clear and Inspiring Plans:** They had a building plan and a campaign plan that made sense and were inspiring.
3. **Informed Staff:** The key staff members made it a point to educate themselves about capital campaign fundraising. They went out of their way to find out what they needed to know.
4. **Effective Teamwork:** They built a great team to work on this project and help with the campaign. Everyone who worked on the project was fully engaged and excited.
5. **Committed Volunteer Leadership:** They enlisted excellent campaign co-chairs who could reach deeply into the community, creating a sense of the inevitability of success.
6. **Attention to Detail:** There was nothing too big and no detail too small for the attention of the development director. She was involved in every aspect of the planning and the campaign.
7. **Clear Communication:** They communicated well with the board, the steering committee, and the gala committee. As a result, everyone felt they were on the same team, and that team was going to do something special for the kids who come to Covenant House Alaska.

For Alison, “no” is only “no” for a minute. When something doesn’t go just as planned, she sees it as an opportunity to get creative.

Photo by Andre Horton.



8. **Focus on Mission:** They never lost sight of who the campaign was really for—the kids! At every opportunity, they highlighted the importance of how the new building would help the youth they serve.
9. **Radical Persistence:** “No” was always seen as the first step toward “Yes!” They weren’t afraid of hearing “no.” In fact, in their view, being turned down set up a reason for ongoing contact. That positive, can-do approach infused everything in the campaign.
10. **Immediate Stewardship:** They took great care of their donors. A donor’s gift didn’t end the contact with that donor. In fact, it was just the beginning. They made their donors feel so good about giving that word spread and others wanted to get involved.

Covenant House Alaska’s fundraising success stems from a deep and abiding belief that the work they do is vitally important. To fully understand Alison’s commitment, try joining her in Anchorage, Alaska, next November for the annual “Sleep Out,” when she and nearly 40 area CEOs will actually sleep outside to experience a bit of what it’s like to be on the streets in the cold. You’ll never see homelessness through the same lens after this experience. 