



# Culture Builds Communities

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# Implementation: Methodologies for Conducting a Successful Capital Campaign

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**Don Chalmers, President, SparrowHawk Consulting and Managing Member, ThunderHawk LLC**, brings nearly 50 years of experience as a community development professional to the SparrowHawk team. A skilled facilitator, Don has worked with Tribes, Colleges and Universities, other governments, non-profits and their governing and volunteer boards, and planning committees. His career includes successful Tribal and other multi-million-dollar capital fundraising projects, cultivation of major gifts from individuals, facilitation, training and strategic planning. For many years Don has been an Adjunct Member of the Faculty at The Evergreen State College, teaching *Doing the Business of Non-Profits Through Grant Writing and Fundraising* and *Becoming a Change Maker: Learning and Acting Locally and Globally* in the Evening and Weekend Studies Program of The Evergreen State College. Don serves on the Boards of the Five Rivers Foundation (Co-Chair), Cangleska Tiyospaye Wakan (Chair), and the South Sound Maritime Heritage Association (Chair) among others. He holds a law degree from the University of Oregon.



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During this presentation we will cover:

Key Capital Campaign implementation activities:

including preparing staff and volunteers,

developing compelling publications,

executing a public relations/media campaign,

approaching donors and acknowledging them, and

conducting successful special events, including the Grand Opening.



Effective  
Campaign  
Planning means  
having all the  
tools you need in  
place.

Examples include:

1. Organizational Review
2. Community Assessment
3. Master Planning
4. Representative, Informed Board
5. Contemporary Strategic Plan
6. Feasibility Studies
7. The 3 Ps: Infrastructure
8. Campaign Plan
9. Business Plan



# The 3 Ps of Campaign Infrastructure

- Policies and Procedures
- People
- Publications

# Let's take a more detailed look and Policies & Procedures



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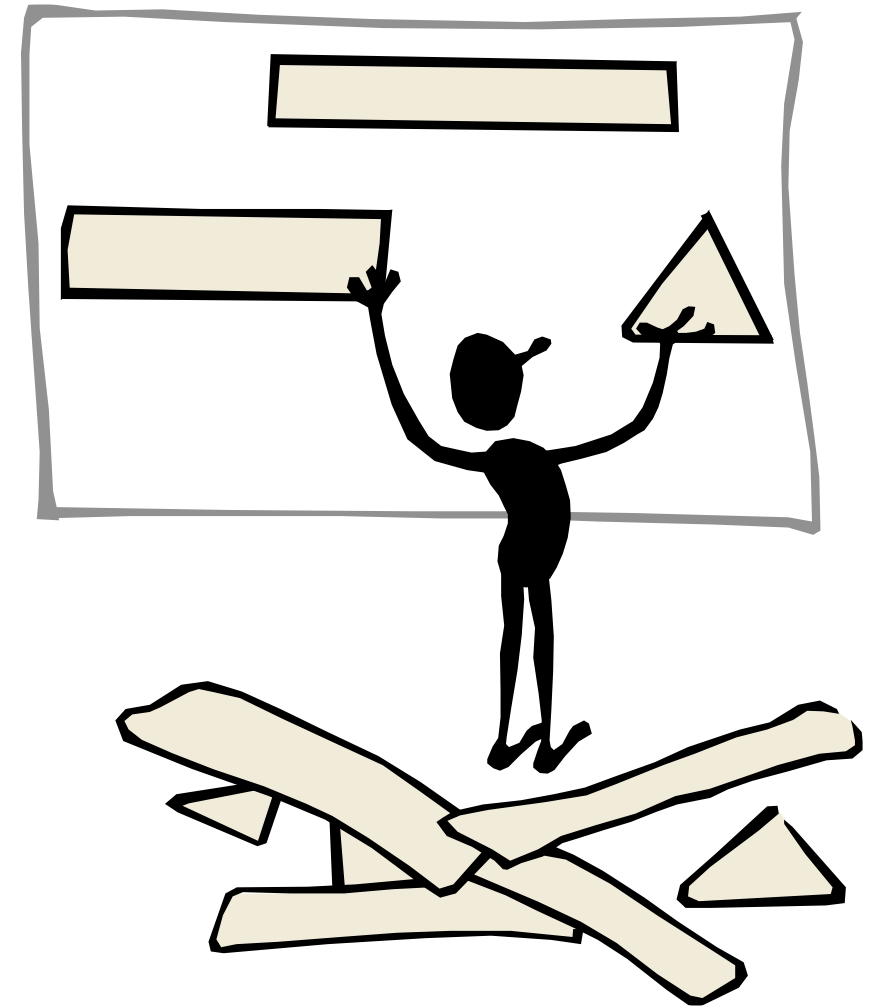


# Getting your Campaign Up and Running



# Campaign Plan

A dynamic blueprint for the campaign.





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# Start With the Plan

- Goal
  - Components – Capital, Program or Comprehensive?
  - Constituency Goals
- Key Constituencies
  - Board/Past Board
  - “Alumni”
  - Members
  - Customers
  - Community

# Sample Campaign Plan

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- Requirements for a Capital Campaign 3
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- Financial Systems for the Campaign 6
- Policies and Procedures 7
- Campaign Publications 7
- The Case Statement 7

# Sample Campaign Plan (continued)

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- Major Events 14
- Supporting Events 15
- Phase 5 — Post Campaign

# Create the Campaign Timetable

## Case/Materials development

- Project description and impact
- Recognition opportunities
- Policies

## “Quiet” phase for major donors

## Board/Insider phase

- Leadership, staff

## Public Announcement

## Public Phase

- Community
- Foundations, Corporations

## Conclusion/Celebration

- Recognition

# Your Case for Support

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- Key principles to integrate:
  - Help donors to “think big” by giving them an inspiring vision
  - Focus on the impact and beneficiaries
  - Distinguish your organization as uniquely qualified to deliver the impact
  - Use external “credentials” when possible

Case  
Statements:  
Helpful  
documents for  
use in building  
a case  
statement

- Mission statement and the need addressed by the organization
- Identity/history of the organization and its service delivery area
- Vision statement
- Environmental Assessment if available
- Summary of area(s) of need for the funds to be raised by the campaign such as:
  - program support
  - new programs
  - new building(s)**
  - administrative/operating needs, current and future
  - endowment
  - matching funds for future or pending grants

Case  
Statements:  
Helpful  
documents for  
use in building  
a case  
statement  
(cont'd)

- Indicators for success of organization in the long term such as:
- Plans for operations and future funding
- Mechanics (financial plan/budget) of organization
- Campaign plan outline: How and what to contribute
- Special campaign fund and/or “Friends of” organization
- Types of gifts accepted: cash, real estate, art, in-kind contributions, etc.
- Acknowledgements?
- Major gifts and naming opportunities
- Graphics standards and logo/art files as b/w or electronic
- Copies of any recent PR/advertising/fundraising materials



# Build your Volunteer Corps

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- Board leadership
- Campaign leadership
  - Volunteers, co-chairs
  - Campaign committee
- Orientation
  - Campaign plan
  - Cultivation/solicitation training
- Management and Support
  - Meeting and reporting
  - Staff Assignments



# Sample 4-Page Case Statement



**Project Team**

The Tribe has established a team composed of staff and volunteers representing the Tribe, the Kitsap Regional Library, and members of the community at large. Together these dedicated team members bring over 100 years of experience in community development, tribal cultural affairs, education, and library services to the House of Knowledge Complex. The Tribe has also retained professional campaign counsel, Sparrowhawk Consulting Company, of Olympia, Washington to assist in the fundraising effort. In accordance with the Port Gamble S'Klallam Tribe's commitment to community involvement, the project will include regular opportunities for Tribal members and those from the broader community to continue their participation in its development.

**How You Can Participate**

The Port Gamble S'Klallam Tribe has established a special bank account for the campaign. Donations can be made to the House of Knowledge Fund, and may be designated to one or more of its components. Gifts can be made in any of these ways: cash, VISA/MasterCard, matching gifts, real estate or securities.

Donors may have a portion of the project named for themselves, a loved one, or any organization or company they designate. House of Knowledge components available for naming opportunities may include the items listed below. The Tribe would be happy to discuss naming arrangements with you or your professional advisors.

All donors will be recognized in an honor registry kept at the Longhouse for Tribal members and visitors to see. Contributions are tax-deductible to the fullest extent of the law and will be used to support Port Gamble S'Klallam Tribe's campaign for "The House of Knowledge."

**Naming Opportunity Examples**

Longhouse Main Hall	\$500,000
Career & Education Classroom	\$115,000
Career & Education Technology Center	\$105,000
Career & Education Legacy Circle	\$100,000
Elders Dining Room	\$100,000
Library Meeting Room	\$35,000
Library Children's Area	\$25,000
Longhouse Exhibits & Archives	\$20,000

**Port Gamble S'Klallam Tribal Council**

Ronald G. Charles, Tribal Chairman  
 Harry Fulson III, Vice Chair  
 Betty DeCoteau, Treasurer  
 Marie Hebert, Secretary  
 Bruce DeCoteau, Councilman  
 Floyd Jones, Councilman

**House of Knowledge Steering Committee**

Senator Datto Murray, Honorary Chair  
 Ron Charles, Port Gamble S'Klallam Tribal Chair  
 Marie Hebert, Cultural Resources Department  
 Laura Ives, Port Gamble S'Klallam Youth Department  
 Mike Jones, Community Member  
 Oliver Jones, Community Member  
 Laurie Mattson, Project Manager  
 Sheryl Scott, Director, Port Gamble S'Klallam Career & Education Department  
 Robin Cameron, Kitsap Regional Library  
 Heather Carrell, North Kitsap School District  
 Suzanne Jones, Little Boston Library, Branch Manager


**For further information please contact the Port Gamble S'Klallam Tribe  
 Laurie Mattson, Project Coordinator  
 (360) 297-2646**

## Xčnatx

# S'KLALLAM

### HOUSE OF KNOWLEDGE

### OUR HERITAGE



*"When Grandmother and Grandfather were young...*

Stories circled Longhouse fires  
 becoming one with the memories  
 of centuries of children  
 who would one day retell them as Elders.

*...S'Klallam words were with us like the wind..."*

Our People danced history in ceremonies,  
 narrated landscapes with totems.  
 We had only to look around us to know  
 where we had come from and who we would always be:  
 The Strong and Clever People.

## OUR FUTURE

# Role of Volunteers

- Uniquely qualified for:
  - Initiating/strengthening relationships with top prospects
  - Soliciting large gifts
- Sharing knowledge about prospects
  - Philanthropic interests, decision makers, timing and approach, family/business considerations, etc.
- Collaboration in strategy development with fellow board members and development staff
- Participation in introductions, cultivation activities, solicitations, stewardship

# Infrastructure Considerations

## “Who’s going to do it...?”

- It’s a numbers game
  - Goal – prospects – solicitations – follow-up – gifts
  - Staffing and resource allocation for maximum results
  - Outsourcing and purchased services
- Role of the CEO and Board

## Communications

- Frequency and content
- Paths and players

# Marketing/PR



Objectives



Message



Audience



Modality



Evaluation

Marketing Need Not Be Expensive!



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- Community Gatherings
- Reader Boards
- Service Clubs
- Faith Communities
- Non-Profits, e.g. Vets Groups
- Established Outlets, Weekly Tribal Newsletter, e.g.
- Others?

# Prospect Management

## Identifying prospects

- Current donors and friends
- Prospecting with your board, campaign council

## Prioritizing prospects

- Capacity, readiness, solicitor match

## Strategy development and implementation

- Standards – actions, participants, materials, etc.
- Visual progress

# Campaign Cultivation Activities

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- Focus on the vision
- Create unique experiences
  - Don't rely just on words and pictures
  - Give prospects something to touch, walk through
  - Create “standard” tours, presentations, etc.
  - Show off your own experts
- Implement activities “On Demand”
  - Only when prospects are ready



# Use graphics to help share the vision



# Approaching Funders™ Training

# Prioritize

- Approach your most friendly funder first
- Certain prospects may be able to contribute a larger amount than others on the list
- Initial contributions have a way of encouraging others to give as well

# Identify Your Team for Each Request

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## + Factors to Consider:

- Your relationship with the prospect
- Your comfort level
- Whether a team might be more persuasive

# Organize Your Visit

- ✦ Call for the appointment far in advance
- ✦ Be clear why you're asking for the appointment
- ✦ Find a comfortable place and time for the visit
- ✦ Send materials in advance of the session



# Getting Ready for the Meeting “Become the Funder”

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Review donor guidelines, propensities, and history

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Carry out needed research and other preparation

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Develop your talking points

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If working with a team meet a little in advance of the prospect meeting to go over the agenda



# The Meeting



Take time to help the prospect feel comfortable and relaxed



At the appropriate time introduce the topic of the “Building for Cultural Resurgence” Campaign



Lay out the basics of the Campaign



Ask for questions or comments

# The Meeting

- ✦ Be sure to address common concerns regarding the campaign:
  - In general, how are the campaign and capital projects going?
  - Why do you consider my organization or me an appropriate prospect?



# The Meeting

- How will the funds you are requesting be used?
- Who else is being asked to contribute?
- Has the Board and Tribal Council and/or other members of the project contributed and to what degree?



# The Meeting

- ✦ If the response is positive or neutral:
  - Ask the prospect to consider a gift of a specific dollar amount
  - Avoid at all costs asking for “whatever you can do”

# The Meeting

- ✦ If the response is negative:
  - Don't feel compelled to make a request
  - Work to address any objections

# Follow-up

- ✦ Always follow up on prospects that need “more time to think about it”
- ✦ Calendar those follow-up calls to remind you to re-contact those prospects
- ✦ Send thank-you notes regardless of the outcome of the meeting

# Other Campaign Considerations

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## Maintain

### Maintain enthusiasm

- Can be a “long haul” with disappointments
- Keep your volunteers positive and enthused

## Share

### Share success stories-do “Updates”

- With Board and leadership, campaign volunteers, staff and donors

## Stay

### Stay focused

- Avoid adding new priorities

# Other Campaign Considerations

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## Donor Needs

Donor Acknowledgement is Key

- Donor Wall; Named Rooms?
- Keep Tribal Culture in Mind

## Keep

Keep Donor Relations in Mind for the Future

- With Board and leadership, campaign volunteers, staff and donors

## Fun

Have Fun!

# Special Events Can Contribute to Your Campaign!

- At least 6 months in advance
- Why this event? Raise Funds/Share Information
- Venue?
- Audience?
- Costs?
- Price?
- Make them a source of continuing support!



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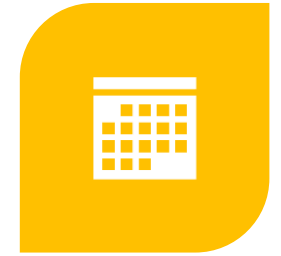
# Grand Opening and Other Key Events



BE AWARE OF CULTURAL IMPERATIVES OF YOUR TRIBE OR VILLAGE-CONSULT THE ELDERS



ENGAGE AND INVOLVE THE YOUTH



FOLLOW THE 6-MONTH RULE!



INCLUDE AND ACKNOWLEDGE DONORS



INCLUDE TRIBAL LEADERSHIP IN THE PLANNING PROCESS AND THE GRAND OPENING, OF COURSE



HAVE A MEDIA PLAN AND ASSIGN STAFF TO IMPLEMENT IT- PREDETERMINE KEY MESSAGING



# Q & A

- Thanks!
- For further information: Don Chalmers at [don@sparrowhawkco.com](mailto:don@sparrowhawkco.com) or
- (360) 280-0511



# Culture Builds Communities

Thank you for watching this tutorial. If you have questions, please email [president@atalm.org](mailto:president@atalm.org).

To view helpful resources, visit [www.atalm.org](http://www.atalm.org)