

**Advancement, Strategic
Planning, Feasibility Study,
and Capital Campaign**

PRESENTATION PROPOSALS

By



By Mark Filips, President
VisionWorksCo.com
402.999.2970/ 888.948.1113
markf@VisionWorksCo.com

GREETINGS FROM MARK FILIPS

Dear Friend,

VisionWorks Fundraising is a group of fundraising specialists with years of experience conducting hundreds of:

- Strategic Planning Processes
- Advancement Audits
- Feasibility Studies
- Capital Campaigns

As we get requests each year for presentations on various topics, we offer you these Presentation Proposals for your consideration. If you see something here that you believe may be useful to your members, and you would like us to make a presentation(s) at an annual or regional conference, we would be most happy to share our experiences and wisdom with you.

Please consider contacting me for further information if you wish.

Sincerely,

Mark Filips

President

402.999.2970

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WHO IS VISIONWORKS?

- Professionals who have worked their whole careers doing stewardship, development, planning, and capital campaigns
- Specialists in helping organizations and communities turn their visions and plans into reality through strategic planning, feasibility studies, capital campaigns, and advancement program guidance
- A team with experience directing capital campaigns and fundraising efforts
- Mark Filips has directed 300+ capital campaigns and indirectly advised on another 1,000+ capital campaigns
- **A group that outperforms all other capital campaign companies**

10 Keys to Capital Campaign Success!

Introduction: An organization only has one chance to get a capital campaign right. There are no do-overs. This presentation, with discussion, aids, and questions/answers will focus on the keys to capital campaign success.

Purpose: Briefly cover the key elements for capital campaign success
Allow questions and discussions after each element presented
Give participants a better sense of what's needed for campaign success

For: Presidents, Boards, Leaders, Presidents/Principals, Development Directors

By: Mark Filips
President
VisionWorks Fundraising
Omaha, Nebraska
markf@VisionWorksCo.com
402.999.2970

Outline: 10 Keys to Capital Campaign Success!

This presentation, with discussion, aids, and questions/answers will focus on the keys to capital campaign success.

1. **Involve Key Groups of People in the Development of the Vision** – A capital campaign is based on your community’s vision or plans. Involve a good cross-section of your people. Make sure to involve your major donors, respected leaders, influencers, various groups impacted, and your staff in the planning process.
2. **Compelling Vision** – Winston Churchill once said that bold visions have the power to stir the blood. Be bold and dream big! People will make sacrifices for those projects that are life-saving, life changing, and impactful.
3. **Allow Sufficient Time for the Dream to Take Hold** – After you have gone through your visioning process, you must “cast” your vision. Share your dreams and plans with the community in every way possible.
4. **Strong Leadership** – Whether you are a pastor, principal, president, or leader, your enthusiastic support of the vision is critical. If you are on fire, your people will be on fire, too!
5. **Conduct a Feasibility/Planning Study to Assess Support** – A study assesses support for your plans from key donors, leaders, and influencers. It also allows you to plant seeds to increase major gifts and it allows you to gather information on donor interest.
6. **Influential Campaign Leaders** – You will eventually need to build a Steering Committee. Select leaders that are 1) positive and supportive, 2) major donor prospects, 3) prominent in the community, and 4) respected by others.
7. **Allow for Significant Time in Prayer and Reflection** – After your capital campaign has begun, you will want to give the people sufficient time for their prayer, reflection, and response. Sufficient time yields the largest gifts!
8. **Seek Large Gifts and Lots of Gifts** – A campaign needs two kinds of gifts to be successful: large gifts and lots of gifts. The largest gifts should contribute make-up 35-50% of the financial total. “Lots of gifts” will come from every member of your community.
9. **Sufficient Pledging Opportunities** – All parts of your community must be given ample opportunities to pledge. Whether through major gift approaches, pre-commitment gatherings, or large-scale commitment weekends, you want to give people as many opportunities as possible to pledge.
10. **Strong Fulfillment (Pledge Collection) Effort** – Pledges made are not pledges received. Simple pledge collection will raise 85-95% of your pledges. A strong and thorough fulfillment effort, employing the four things that can increase your pledge collections can increase your pledges up to 125% or 150% of your total.

Strategic Planning

Introduction: The future will not be like the past. To succeed in the present and the future, organizations must PLAN to succeed.

Purpose: To make a case for long-term planning
To answer some basic planning questions
To cover the steps in getting ready for a planning process

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By: Mark Filips
President
VisionWorks Fundraising
Omaha, Nebraska
markf@VisionWorksCo.com
402.999.2970

Outline: Strategic Planning

To succeed today, organizations must gather their stakeholders and create a plan.

The future will not be like the past. More and more today, organizations need to be engaged in what's called strategic or long-term planning. In years past, organizations could rely on loyalty and inertia to power them forward. No more! Today, many people, especially the young, have greater choices with regard to whom they give their attention and how they spend their time and money.

Organizations with strong missions, visions, and plans have the highest levels of performance and success! A master plan is key to 1) setting a direction, 2) creating excitement, 3) attracting people and financial resources, 4) forming a culture, and 5) unifying the community.

Now, with some idea of what mission/purpose and vision/goal statements are, how can you start creating these for your church, school, or organization? Here are some simple ideas to start your process.

- 1) Gather your staff, committees, community leaders, and members together for a series of gatherings/working meetings.
- 2) Make a plan to determine the mission, the vision or goal statements for each area, and the approximate steps and timelines to accomplish each goal.
- 3) Keep it modest! Three to five goals (for the next five years) in each area of organizational life may be enough!
- 4) The master plan or strategic plan collects the goals and steps for each area of organizational life.
- 5) For each goal, make sure to have project leader or person responsible, an approximate timeline, an approximate budget, and approximate space, facilities, and materials requirements.
- 6) Ratify this as an organization.
- 7) Re-visit the master plan every quarter for the next five years.
- 8) If you are serious, seek professional counsel to lead you through the visioning process and creating a step-by-step, five-year master plan.

Outline: Strategic Planning, Cont'd

What is Strategic Planning?

Why do Strategic Planning?

What kinds of goals does a Strategic Planning Process seek to identify?

A strategic planning process seeks to implement goals that are S-M-A-R-T.

- S – Specific – target a specific area for improvement
- M – Measurable – are quantifiable
- A – Assignable – specify who will do it
- R – Realistic – state the goals which are achievable and challenging, but that can be realistically given available resources
- T – Timely – specify when the steps and result(s) can be achieved

What does a Strategic Planning Process look like?

Phase I – PRELIMINARY PLANNING - “Planning to Plan” - (4-6 weeks)

Phase II – ASSESSMENT - “Where did we come from? How are we doing?” - (4-6 weeks)

Phase III – DEFINING GLOBAL DIRECTION - “Where do we want to go?” - (4-6 weeks)

Phase IV – DEFINING THE STEPS (Strategizing) – “Steps to achieve our dreams”

Phase V – FINALIZE THE PLAN – “Agreeing on the plan” - (4-6 weeks)

Phase VI – Plan Implementation (3 to 5 years)

Steps from Planning to Feasibility Study to Capital Campaign

Introduction: How does an organization get from making its plans through study process and campaign process to implementation of its plans?

Purpose: To lead participants through from planning to capital campaign completion, and beyond
To take them through the simple steps
To answer questions as we go along

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President
VisionWorks Fundraising
Omaha, Nebraska
markf@VisionWorksCo.com
402.999.2970

Outline: Steps from Planning to Feasibility Study to Capital Campaign

A well-planned capital campaign can unleash great potential, volunteer involvement, and generosity that go well beyond the financial results of the capital campaign. Most pastors and leaders, after surfacing the needs and creating the vision/plans have deep anxiety about the next steps. These next steps can be mystifying to them, but to an experienced consultant or company, they should not be.

The general outline from creating your plans to implementation of your plans will include:

- **Finalizing the Plan** – Through a formal or informal planning process or facility study, you will be able to create your vision and long-term plans.
- **Conducting a Feasibility Study** – A feasibility (how much can we raise?) or planning study (how will we raise it?) will involve interviews with 30-50 key financial donors and the parish leaders and influencers.
- **Finalizing Vision** – The results of the interviews and focus groups will help you to fine-tune your plans to include the things that are well-supported and to remove, if necessary, the things that are controversial.
- **Digesting the Results of the Study** – Church leadership usually needs a little time, usually not very much time, to digest the results and feedback of the study. This feedback will help you craft your vision, your capital campaign team, and your campaign calendar.
- **Deciding to Go Forward with a Capital Campaign** – If the need is real and the informal or formal planning process was open and inclusive, then, usually, the next step is to move forward with a capital campaign.
- **Capital Campaign Design** – After deciding to move forward with a capital campaign is been made, the pastor and leadership along with the campaign professional; design the campaign. Design includes campaign chairs, campaign teams needed, campaign calendar, etc.
- **Capital Campaign Chairpersons** – As the campaign is being designed, three to five chairpersons must be recruited to oversee the 10 to 14 teams/sub-committees. The chairpersons should be prominent, well-thought-of, successful, friendly people.
- **Capital Campaign** – The capital campaign will include five phases: 1– Preparation, 2 – Information, 3 – Stewardship Reflection, 4 – Commitment, and 5 – Pledge Fulfillment.
- **Pledge Fulfillment** – Pledges made are not pledges fulfilled. A thorough one-year and three-year pledge fulfillment plan must be created, with the help of your consultant, not only collect the pledges but to keep the financial results going higher!
- **Implementation of Plans** – Church, school, or organizational leadership, with the assistance of a Building Committee, if necessary, will begin to implement the plans.

Writing an Urgent Vision or Case Statement

Introduction: Key ways and different ways to write a case statement.

Purpose: Explore the basic elements of a case

Provide samples of various cases

Discuss and answer questions along the way

Sample cases and guides on writing provided

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President

VisionWorks Fundraising

Omaha, Nebraska

markf@VisionWorksCo.com

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Outline: Writing an Urgent Vision or Case Statement

A capital campaign begins with an inspirational, well thought out and sound Vision or Case Statement of Need. Everything flows from this Vision or Case Statement! We distinguish between Case and Case Statement. Very simply, a Case may answer the question, “What are we doing?” The Case Statement tries to answer the question, “Why should we care?” Obviously, the Case Statement should be urgent, compelling, persuasive, inspirational, and convincing.

The things you want to cover in your Case Statement are:

- 1) Mission – What is your community’s purpose?
- 2) History – Give a very brief history of your community and how the people of your community have been faithful to that mission over the years.
- 3) Your Problems, Challenges, Needs Opportunities Now – What are your A) Difficulties, Problems, Challenges, or Needs or B) Opportunities now?
- 4) Your Solution – What is the solution that your leadership has come up with to face your A) Problems, Difficulties, Challenges, or Needs or your B) Opportunities?
- 5) Your Financial Plan – Based on your solutions or answer to your needs,
A) What are the component costs of each of your projects and
B) How will you finance them? (Capital campaign(s) over the years, money in the bank, sale of land, or loan from the bank...)
- 6) Call to Action – You’ve communicated your mission, your faithfulness in the past, your problem, and your solution. Now is it time to call people to action! A successful capital campaign consists of “big gifts” and “lots of gifts.” Now it is time for everyone to pray, consider, get involved, and give sacrificially and generously!

Sample cases and guides on writing provided

Explore the basic elements of a case

Provide samples of various cases

Discuss and answer questions along the way

A Leader's Role in a Capital Campaign!

Introduction: Key roles of a leader in a capital campaign.

Purpose: Simply review key elements of a leader/director's role in a capital campaign

Discuss and answer questions

Provide suggestions for assistance

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By: Mark Filips

President

VisionWorks Fundraising

Omaha, Nebraska

markf@VisionWorksCo.com

402.999.2970

Outline: A Leader's Role in a Capital Campaign!

A successful capital campaign begins with the spiritual leadership of the pastor. What are some key attitudes, decisions, and actions of the pastor in the campaign process that will foster success?

- **Timely Development of a Plan** – Whether it is a strategic plan or a facilities study, the pastor and the church leaders want to keep driving the plan forward. The planning process needs to involve some experts, the church leaders, and representatives of key groups and it needs to be open, collaborative, and sufficiently reflective. The process needs to keep moving forward, but it does not need to be rushed.
- **Being Involved with Key Decisions** – As the planning process moves forward, there will be times when decisions must be made. Sometimes making these decisions can be very difficult. But if the Holy Spirit and experts and key leadership groups have been involved all the way along, a path will emerge. Some churches avoid decisions, and this guarantees the status quo and no movement forward. As one writer says, “When decisions are made, new energies are released, and the next steps emerge.” Making decisions that are for the long-term benefit of the whole community will usually be very appealing to people.
- **Making a Decision for a Feasibility or Planning Study (“study”)** – With any sizable and important project, it is necessary to do a study. A study involves 30-50 key donors in personal interviews and the leaders of the church in one or several focus groups. Studies share information about the plan, build excitement, answers lots of questions, and gets donors and leaders thinking about larger gifts and involvement in a capital campaign. The pastor and leaders will need to decide to move forward with a study, as well as provide the names of key donors and leaders. If the leaders of the church support your plans, the chances are that your campaign will be a success.
- **Making a Decision for a Capital Campaign** – If two-thirds to 95% of your key donors and church leaders support your plans, then the capital campaign is a go. In the midst of the study, the study professional will be able to tell with opinions are supportive of moving forward. With these impressions in place, the pastor and leaders can confidently decide on the next step – a capital campaign.
- **Selecting Chairpersons** – After the decision is made to move forward with a capital campaign, the pastor and key leaders should begin thinking of three to five good chairpersons or chair-couples who will recruit the key team/sub-committee leaders and oversee the mechanics of the campaign for the pastor.

Outline: A Leader's Role in a Capital Campaign!, Cont'd

- **Other Involvements of the Leader in the Capital Campaign** – Once the entire steering committee is recruited and the various teams' projects are undertaken, the pastor needs to focus on:

Communication – From steering committee training onward, the pastor will want to dedicate at least five-to-ten minutes in key organizational meetings each month to sharing the vision and campaign details.

Writing of Key Letters – Of course, there will be key letters (templates of which are provided by the fundraising professional) for newsletters, brochures, and fundraising packets.

Key Lead Gift Visits – For an overwhelming financial result, visits to key donors will be necessary. The director always gets the largest gifts. So, the director's role in these visits will be crucial. The visits are opportunities to share the vision and invite donors to join in the vision.

Capital Campaigns: How Much Can We Raise?

Introduction: Different rough estimates and ways to determine what could be raised in a capital campaign.

Purpose: Review the key determiners of capital campaign potential
Discuss a feasibility or planning study
Discuss and answer questions as we go along
To point out resource and assistance options

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By: Mark Filips
President
VisionWorks Fundraising
Omaha, Nebraska
markf@VisionWorksCo.com
402.999.2970

Outline: Capital Campaigns: How Much Can We Raise?

An organization that is captivated by a vision and decides on a capital campaign always asks, “How much can we raise?” The following guides will be helpful in answering that question.

1. An organization can raise 2 – 6 times their annual income. Some organizations have raised up to 18 times their annual incomes with especially mission-driven, inspiring visions! But the financial result is dependent on many things, such as vision, spirit, leadership, strong major gifts effort, plenty of focus and attention, consistent messaging, plenty of pledging opportunities, etc.

2. What is the nature of a project? There is a hierarchy when it comes to enthusiasm for different projects. The hierarchy of support is:

- New buildings or programs (2 – 6 times annual income)
- Land purchases (2 – 4 times annual income)
- Significant new addition, major renovations (2 – 6 times annual income)
- Scholarships, tuition assistance, new programs (2 – 3 times annual income)
- Endowments (1 – 2 times annual income)
- Debt reduction (1.5 – 2 times annual income)
- A formal or informal feasibility study must be done to determine the financial goal

3. Demographics – The demographics of a community are important.

- How many supporters do you have? How big is your potential base of support?
- What percentage of households supports your organization over the course of a year?
- Is the community younger, middle-aged, or older?
- Is your organization a lower, middle income, upper class, or mixed neighborhood?

4. Financial Potential

- What was the total organizational income in the last year? The last three years?
- Has a capital campaign been run before? When?
- What is the potential for \$50,000, \$100,000, \$500,000, \$1,000,000 gifts, and larger?
- What kinds of high-income earners do you have in the community?

5. Giving History

- What is the average gift per household?
- Who has given? What was given to previous campaigns?
- Is stewardship an emphasis?
- Higher per capita records of giving will often raise more than organizations with lower per capita giving.

6. Director, Lay, and Staff Leadership

- Do the directors, board members, lay leaders, and staff support the vision? The capital campaign?
- Who in the organization supports the project? Who is against it? How influential are supporters and non-supporters?
- Can the director, board members, etc., give full-throated support to the vision and campaign?

Outline: Capital Campaigns: How Much Can We Raise?, Cont'd

7. The Spirit Within

- Is the community united and one?
- Is the community positive about and excited by the vision, the goals, and the project?
- As Winston Churchill once said, “Bold visions stir the blood!” Is the vision big, bold, live-saving, life-changing, worthwhile, and compelling?

As you've read, a successful capital campaign's financial goal is dependent upon many factors. An organization can raise 2 to 6 times its annual income and up to 18 times its annual budget – depending on the above factors. **For most projects and definitely for larger projects, a separate feasibility or planning study is necessary.**

Capital Campaigns: Can We Do Them Ourselves?

Introduction: Thoughts on in-house capital campaigns.

Purpose: Review the keys to campaign success
Review the pitfalls of do-it-yourself campaigns
Discuss, answer questions, and point to resources

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By: Mark Filips
President
VisionWorks Fundraising
Omaha, Nebraska
markf@VisionWorksCo.com
402.999.2970

Outline: Capital Campaigns: Can We Do Them Ourselves?

Once a community has decided to pursue its dreams and launch a capital campaign, a question arises in some quarters, “Should we hire a fundraising professional, or should we attempt to do it ourselves?” This is a fair question considering some organizations have advancement professionals on staff and have a great deal of lay talent. As someone who has worked on the staff of non-profits; been trained in stewardship, development, and capital campaigns; and worked on 300+ campaigns, I will offer you an answer and some points to consider.

The short answer is, “**Don’t attempt to do a capital campaign by yourself!**”

- 1) **You only have one chance!** It is never easy raising money. An organization has only one chance to get it right. From the beginning, you must give it the **very best effort possible** to reach its goals. There are no do-overs. Once a campaign misses deadlines, loses momentum, and bogs down – it is finished. And this failed campaign will have a lasting effect on your organization and community.
- 2) A capital campaign is a complicated project with many moving parts and sub-specialties. These campaign aspects include leadership, strong case, design calendaring, timing, print, visual, lead gifts identification and solicitation, mid-tier gifts, weeks of ongoing communication, membership pledging, and three to five years of pledge collections. A successful professional must have knowledge and years of experience with all these aspects of a campaign.
- 3) A capital campaign consultant should be a trained professional with the experience of directing many capital campaigns. This vast experience gives him/her the **ability to identify opportunities and overcome obstacles**. And every organization has issues and obstacles to address and overcome. An experienced professional has seen his/her share of challenges.
- 4) **An experienced, fundraising professional should be able to raise you at least 2X to 4X the amount you could raise on your own, sometimes even more!** That increased value will pay for itself many times over.
- 5) In 25 years I have only seen one small, wealthy, organization successfully raise most of the money it needed on its own! They raised most of the needed \$165,000, though not all, because the director went to visit each of the 60 donor-member personally.
- 6) I know of another organization that wanted to raise \$3 for a social hall-gym. They raised \$1.5 million, on their own, though area professionals knew they could have raised \$3 million-plus. And their dream was never realized, as the beautiful social hall was essentially turned into a steel gym.

Outline: Capital Campaigns: Can We Do Them Ourselves?, Cont'd

- 7) After finishing one capital campaign, one campaign leader said to me, **“Either you hire a consultant, or you do it the wrong way!”** I used to think that was a bit strong, but now I see how true it is.

- 8) **In the beginning a community a community worries about its fees; in the end, it worries about how much money it raises!** A few dollars saved in the beginning can mean hundreds of thousands and millions lost in the end. A community can “Trip over dollars picking up dimes!”

- 9) Every career requires its own skill sets, training, and years of experience to become skillful at it. This fact is true of all occupations – waiters, chefs, bakers, plumbers, teachers, fundraising consultants, architects, construction managers, accountants, lawyers, doctors, etc. These days, attempting these things ourselves can produce colossal failures. You will raise much more money and save yourself headaches, embarrassment, and failure by hiring an experienced capital campaign consultant.

Great Cases, Great Campaigns!

Introduction: Construction a vision or case.

Purpose: How do we construct a vision or a case basket?

Review the building of a case

Discuss, answer questions, and point to resources

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By: Mark Filips

President

VisionWorks Fundraising

Omaha, Nebraska

markf@VisionWorksCo.com

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Outline: Great Cases, Great Campaigns!

Organizations have big dreams and plans that, from time to time, need to be funded by a capital campaign. For a successful capital you need to start with a great case!

Where does a great case come from? Ideally, your vision, plans, or case follow a formal or informal planning process. Many organizations go through a planning process and come up with some exciting plans, projects, and needs. Other organizations have had pressing needs for 10, 20 or 30 years. Sometimes there isn't much need for a formal planning process when the needs are apparent to everyone. Some organizations have their cases thrust upon them. The organization's campus is 50 years old, it is in need of major renovation, and it is apparent to all.

So, the case can come from a planning process or a long seen need, or it can be thrust upon you. It really doesn't matter how it develops as long as your leaders are on board, you can demonstrate the need, and your people will support it.

What are the most exciting cases or projects? As you'll come to learn, some cases and projects are more exciting than others. Very simply there is a hierarchy of things that people they will support. The hierarchy of projects is: 1) new buildings, 2) campus modernizations, 4) new and important programs, 5) various significant maintenance projects, 6) tuition assistance, 7) debt reduction, and 8) endowments.

How should we think of our case? Think of your case as a basket of projects that you are offering your people. Have things in the basket that can excite people, if possible. Have things in the basket that most significant groups can support. Mix and match the projects. For example, your case may be renovation, some building improvements, and some debt retirement. Or it may be a new gym, a STEM lab for the school, and some maintenance projects. You get the idea. Your case basket can have three to five main groupings in it.

How do we know what our people will actually support? Most all organizations should do a formal (with a report) or informal feasibility study. In a feasibility study, we interview 30 to 50 individuals and couples and some focus groups. Through these activities your people will tell us what excites them and what they will support. An outside company, such as VisionWorks, interviews your key donors and leaders to get their objective, unvarnished opinions. And once they tell you, listen to them. If they tell you they support A and B, but not C, put A and B in the basket. If they tell you they support traditional renovation but not the contemporary plan, go with the traditional plan. Following their advice will make all the difference to the success of your capital campaign.

What if we "must" include something unappealing in the case? If you have a \$50,000 monthly mortgage bill and that must be the main component of your case, then there are ways to make that more compelling. We will help you craft your exciting message. One way to turn something such as debt reduction into an exciting case element is for the organization to ask, "What are the things we can do with an additional \$50,000 a month? What new programs could we add?" Asking these questions means an organization **must** begin to engage in real planning. Do you, for example, want to add a fantastic youth program, or outreach program, or elder care program, or parish nurse-clinic, or food pantry, or job-interviewing program, etc? Loans must be repaid, but we can excite and inspire people --- if we have a plan!

10 Q&As About Successful Capital Campaigns

Introduction: Reviewing the keys to successful capital campaigns.

Purpose: Review commonly asked questions about capital campaigns

Provide time for discussion and Q&A

Point to resources

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President

VisionWorks Fundraising

Omaha, Nebraska

markf@VisionWorksCo.com

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Outline: 10 Q&As About Successful Capital Campaigns

These are some capital campaign questions we have seen over the years.

How do we know if we need a capital campaign? If 1) your projects are more than 1X your regular yearly income, 2) you can't pay for the project(s) with savings, and 3) you don't anticipate other kinds of income to cover the cost of the projects, then you most likely need a capital campaign.

How often can we run a capital campaign? You can run a capital campaign every three years, but be aware that there can be some fatigue or drop-off. We have seen organizations run five capital campaigns in a row. Your capital campaigns will be more successful if you add new elements to your case each time you conduct a capital campaign.

How much money can we raise? Good question. A feasibility study ("study") will tell you what can be raised. VisionWorks likes to set three (small, medium and large) financial goals: 1 – Celebration Goal, 2 – Challenge Goal, and 3 – Transformation Goal. In a study, we will interview your top donor prospects and leaders. With these interviews and focus groups, and our experience, we can tell you how much can be raised. Depending on the vision, we have seen organizations regularly raise two to six times their yearly giving. And some exceptional campaigns have raised 10 to 18 times yearly giving.

Does an organization need a feasibility study? Generally, yes. The bigger the vision, the more complex the funding, and the more necessary the funds, the more important a study.

How long does a feasibility study take to conduct? For many organizations, six to eight weeks is usually sufficient. For larger organizations, a study can take three to six months.

What does a study provide us? A study provides you with all kinds of **information**, which is the basis of a successful campaign. Without a study, an organization is flying blind. A study:

- 1) Pre-informs/sells your key donors and leaders
- 2) Tells you what key donors think of your vision and gives you time to improve your plans
- 3) Plants seeds for larger gifts: \$100,000 gifts can turn into \$500,000 gifts and \$1 million gifts can turn into \$2 million gifts
- 4) Tells you who other large donors might be
- 5) Provides names of good chairpersons and team leaders
- 6) Tells you when to prepare for and launch the campaign
- 7) Provides concepts and language to craft your message and hit your target

Can we do other fundraising while doing a campaign? Yes, most organizations have to continue their normal fundraising. But when an organization runs a capital campaign, the capital campaign must be the priority for that period.

Outline: 10 Q&As About Successful Capital Campaigns, Cont'd

What are the characteristics of a successful campaign? A successful campaign needs: 1) a good vision, 2) realistic and yet challenging financial goals, 3) enthusiastic leadership, 4) an optimal calendar, 5) a very strong major gift effort, 6) plenty of information and publicity, 7) plenty of opportunities to pledge, and 8) a strong pledge fulfillment plan.

How long does it take to run a campaign? The campaign's length depends on the organization's size. For most organizations, it is around five to six months. For larger organizations, it can take nine months to eighteen months.

Is professional guidance necessary? Yes! You only have one chance to get it right. There are no do-overs. A friend of mine at a large non-profit likes to say, "You either hire professional counsel, or you fail." Strong – yes, but true. A professional will raise you **at least two to four times** what you can raise on your own. And he/she will help you overcome the obstacles you will face. The increased money raised and the expert counsel provided will more than pay for themselves!

10 Keys to a Successful Advancement Program!

Introduction: Important elements in a successful advancement program.

Purpose: Review key elements for basic advancement success

Provide discussion and Q&A

Point to resources

For: Presidents, Boards, Leaders, Presidents/Principals, Development Directors

By: Mark Filips

President

VisionWorks Fundraising

Omaha, Nebraska

markf@VisionWorksCo.com

402.999.2970

Outline: 10 Keys to a Successful Advancement Program!

1. Create a Blue Ribbon Foundation Board or Advancement Council – Simple fundraising has not been able to keep up with the growing needs of many organizations. A comprehensive Foundation or Advancement Program is necessary for many today.

Start by creating Blue Ribbon Foundation Board or Advancement Council, a body that will oversee the various activities of your Advancement Committees. Recruit leaders who: 1) share the mission, 2) are respected and prominent in community, 3) are people of means, and 4) see the bigger picture. The Advancement Council should: 1) meet quarterly, 2) stay abreast of organizational and Foundation/Advancement Committee activities, 3) give oversight and support to the various Foundation/Advancement Committees, and 4) provide long-range planning for the future.

2. Create Advancement Committees – With the Advancement Council as the overseer, create committees to implement the work of the Advancement Program: 1) Major Gifts, 2) Estate Planning, 3) Annual Fund, 4) Marketing, 5) Student Recruitment (If you have a grade school or high school), and 6) Planning.

3. Create a Major Gifts Committee – Major donors are always important to an organization, to a campaign, and to fundraising. In order to engage your major donors you must have a relationship with them. Your relationship with your major donors involve 1) friendship and 2) information. Identify your 50-100 major donors (more if you can), and engage them regularly for informational lunches, dinners, and socials.

4. Create an Estate Planning Committee – In the next 20 years 25+ trillion dollars will be transferred from one generation to the next. If your organization is not making your case for support, you will be left behind. Form an Estate Planning Committee and hold periodic Estate Planning Workshops for your organization's members, supporters, friends, and alumni.

5. Create an Annual Fund Committee – Create an Annual Fund Committee to oversee all the fundraising activities that occur each year. These activities need to be planned, coordinated, and improved upon for maximum effectiveness.

6. Create a Marketing Committee – Create a Marketing Committee to communicate with the various segments (publics) of your organization. Your publics include such groups as major donors, organization leadership, staff, members, parents, students, alumni, civic leaders, and business leaders.

7. Create a Student Recruitment Committee (Schools) – The committee can sponsor on-site events throughout the year such as open houses, scholastic contests, Buddy Days, various summer camps... This is in addition to media campaigns involving radio, TV, social media, billboards, mailings, literature...

Outline: 10 Keys to a Successful Advancement Program!, Cont'd

8. Create a Planning Committee – Create a Planning Committee that coordinates a 1, 3, and 5-year plan for your Advancement Council and committees. Your plans can include the activities your committees will be involved in, various targets/goals, and ways to improve.

9. Review Advancement Council and Committees Plans Each Year – Planning is the key to a successful Advancement Program. Planning moves everyone efficiently toward the attainment of goals. In fact, good planning on the front end will reduce time, energy expended, and costs on the back end.

10. Consider an Advancement Review – Advancement Programs can benefit from 1) Outside Assessments, 2) Board Orientation, 3) Strategic Planning, and 4) Advancement Program building.

Major Gifts: The Key to Capital Campaign Success!

Introduction: Cultivating major donors in preparation for a successful capital campaign.

Purpose: Review importance of major donors
Discuss ways to include donors in the complete process
Discuss ways to identify and evaluate donors

For: Presidents, Boards, Leaders, Presidents/Principals, Development Directors

By: Mark Filips
President
VisionWorks Fundraising
Omaha, Nebraska
markf@VisionWorksCo.com
402.999.2970

Outline: Major Gifts: The Key to Capital Campaign Success!

One of the most important keys to capital campaign success is the strong support of your lead donors or major donors, and many people overlook them! There are a good number of people who believe that a successful capital campaign is only a matter of distributing a good brochure and commitment card, after which the gifts will come flowing in. That is just not true, no matter how good your project is. As one organization director told me, “Mark, if that were true, we’d all be doing it, we’d all be successful, and we wouldn’t need you!”

The **personal approach** to the major gift prospects gets the ball rolling for the whole campaign. **A successful lead gifts effort will raise 35-50% of the financial goal for small and medium-sized campaigns and 50-75% of the financial goal for larger campaigns!** As a fundraising truism goes, “For every dollar you can raise through a letter, you can raise \$10 through a phone call, you can raise \$25 through a party, and you can raise \$50 through a personal visit.” There will be fewer people contributing major gifts (five, six, or seven-figure gifts), but a successful major gifts effort is essential to a capital campaign’s financial success.

The cultivation of major donors needs to start as early as possible. Consider involving major donors in these key moments of your process:

- Involving major donors in the strategic planning process by asking for their ideas and feedback
- Having a special lunch with them to ask their opinions on the plans and get their feedback
- Giving you major donors leadership positions in the strategic planning, feasibility study, and capital campaign processes
- Considering sincere friendship-building activities with the major donors such as lunches, cocktails, and dinners
- Conducting special capital campaign information gatherings with major donors
- Implementing a major gifts solicitation strategy during your capital campaign, which will include:
 - A) Identification of major donors
 - B) Evaluation of major donors
 - C) Recruitment of major donor solicitors or gift seekers
 - D) Meeting with major donors to share the vision, answer questions, and make the “ask”
 - E) Tracking all gift seekers through the solicitation process
 - F) Providing ample thanking opportunities for major donors

The Importance of Feasibility Studies to Capital Campaign Success!

Introduction: Feasibility studies are essential to assess donor support and to cultivate major donors.

Purpose: Review what a feasibility study is, key elements of a good study
Review key benefits of a study
Discuss and provide Q&A

For: Presidents, Boards, Leaders, Presidents/Principals, Development Directors

By: Mark Filips
President
VisionWorks Fundraising
Omaha, Nebraska
markf@VisionWorksCo.com
402.999.2970

Outline: The Importance of Feasibility Studies to Capital Campaign Success!

From time to time every organization must consider a capital campaign. And to lay the groundwork for a successful Capital Campaign, they SHOULD consider a Feasibility or Planning Study (formal or informal). A feasibility study tells you how much you can raise; a planning study tells you how you will do it.

A Feasibility or Planning Study (“Study”) should be considered if:

1. The case is still unknown to a large number of people, especially major donors
2. An organization is considering a large project(s)
3. The organization’s plans are not well known
4. An organization does not know how people feel about the proposed plans or case

A Study will help you:

1. **Strengthen relationships** with major donors and solicit their feedback
2. **Assess the opinions** of the case or plan
3. Provide you information to **set a realistic yet aggressive financial goal**
4. Raise the **financial giving sights**
5. Surface **major donors**
6. Surface the names of **campaign Steering Committee members**
7. Discover good dates and bad dates to **create an optimal campaign calendar**
8. Create **excitement and momentum**
9. Instill a **sense of gratitude**
10. Instill **greater peace of mind** in the parish leaders

A capital campaign is usually implemented after a study has “tested” the vision and the financial goal. The length of time it takes to run a campaign can be around from six months to eighteen months, depending upon the size of the organization, and includes:

- Design and Preparation Phase
- Silent Phase – Major Gifts Phase Public
- Information Phase
- Commitment Phase
- Pledge Fulfillment (Three to five years)

Review what a feasibility study is, key elements of a good study

Review key benefits of a study

Discuss and provide Q&A

Estate Planning: Simple Steps to Success!

Introduction: Preparing and implementing a simple but effective estate planning program.

Purposes: Review Estate Planning/Legacy Societies
Provide simple how-tos for Estate Planning/Legacy Societies
Provide Q&A and discussion

For: Presidents, Boards, Leaders, Presidents/Principals, Development Directors

By: Mark Filips
President
VisionWorks Fundraising
Omaha, Nebraska
markf@VisionWorksCo.com
402.999.2970

Outline: Estate Planning: Simple Steps to Success!

If your organization doesn't have an Estate Planning Program or Legacy Society, then you really need to consider them soon. They're easy to set up. They're important for the strength and growth of your organization. And if you're not receiving these bequests, someone else is! Take a look at these basic facts and you'll see why you need an Estate Program/Legacy Society. Simply stated, estate planning work obtains the gifts; legacy society work keeps and grows the gifts!

The largest gifts to an organization, any organization, come through estate bequests!

THE AVERAGE *UNSOLICITED BEQUEST* IS \$35,000; THE AVERAGE *SOLICITED BEQUEST* IS 200,000! LARGER BEQUESTS COME THROUGH ACTIVE SOLICITATION.

90% of estate gifts are given through simple bequests.

From 1998 to 2052, a minimum of \$41 trillion will be transferred from one generation to the next. (Scherisch, 2000)

Of 20,000 donors over age 50, less than 9% have an estate plan. (James, 2006)

Here are some simple steps:

- Talk to your Director about forming or strengthening an Estate Planning/Legacy Society.
- Educate yourself about the simple basics; the lawyers know the rest.
- Recruit a leadership committee of five, ten or twenty passionate people.
- Ask the leadership committee to take the step of naming your organization in their wills. Once they've indicated you're in their wills, you have a Legacy Society! A Legacy Society is simply a group of people who've indicated that you're remembered in their wills.

- **For the Estate Planning Program, do at least the following:**
 - 1) Send three letter mailings and brochures per year with a postcard to let you know if you're in their will. Always put your organization's legal name in easy to find places.
 - 2) Hold one or two estate planning workshops per year.
 - 3) Talk about your Estate Program/Legacy Society at every board or committee meeting and every event possible.
 - 4) Make sure an ad for Estate Bequests and your legal name is in every communication sent out by your organization.

- **For the Legacy Society, do at least the following:**
 - 1) Mail personal cards on all birthdays and anniversaries.
 - 2) Have a Legacy Society social or soiree or appreciation once or twice a year.
 - 3) At each appreciation, let donors know of your future plans and solicit their feedback.
 - 4) **Consider Active Solicitation or Outreach for the largest bequests!**

Fundraising and the Importance of Saying “Thank You”

Introduction: The importance and benefits of saying thank you.

Purposes: Relate real story of missed thank you opportunity

Discuss attitudes toward acknowledgement and thanking

Review ways to thank donors

For: Presidents, Boards, Leaders, Presidents/Principals, Development Directors

By: Mark Filips

President

VisionWorks Fundraising

Omaha, Nebraska

markf@VisionWorksCo.com

402.999.2970

Outline: Fundraising and the Importance of Saying “Thank You”

A Story of the Importance of Saying Thank You

Several years back I was directing a capital campaign for a large organization. The organization had a good case, an excellent leadership team, and a director who understood the importance of lead gifts to a successful campaign.

The Lead Gift Team went through the process of identifying the lead donors to the campaign. There was a man named Tony, who had given \$1 million to the organization’s previous capital campaign. With Tony’s continued involvement in the organization and another inspiring case in front of them, the Lead Gift Team assumed that Tony would be supportive of this new campaign.

The solicitors went over their plans to meet Tony, the elements of the case that they were going to highlight for him, and their “ask” for \$1 million. The day came to meet Tony, and everything was going well. The solicitors felt sure that Tony would make another gift of \$1 million. The solicitors made the ask and waited. To the solicitors’ surprise, Tony turned them down. Why? Tony went on to recount that no one had bothered to thank him for his \$1 million gift to the previous campaign. If they couldn’t thank him for the previous gift, they were not going to get another! The \$1 million gift was lost because of a failure to thank the donor.

As amazing as it seems, some CEO’s, principals, directors, pastors, and presidents don’t feel that it is necessary to thank people. When I’ve heard the directors of organizations mention that they won’t thank donors personally by signing thank you notes, or by some other means, I often ask myself, “Why?” And I confess, I still don’t understand this attitude. Are they too proud to say thank you? Is it too much effort? Do they feel it weakens them? Do they believe that people “owe” them their gifts? Who knows?

Let’s try to be as clear as possible, it is important to thank people, in as many ways as possible, as often as possible!

Outline: Fundraising and the Importance of Saying “Thank You”, Cont’d

Some Ways of Thanking Donors

- 1) Handwritten and personally signed thank you notes.
- 2) Coffees, lunches, dinners or cocktails of gratitude. We spend a lot of effort to solicit gifts. Why not spend some effort to say thank you?
- 3) Have those impacted by donations – children, scholarship beneficiaries, service beneficiaries, or members – write a personal thank.
- 4) Record a short video message.
- 5) Have children draw or color personal thank you notes and just sign their first name.
- 6) Walls of Remembrance for large and small gifts.
- 7) The naming of pavilions, wings, entrances, conference centers, gyms, meeting rooms, gardens, windows, furnishings, and towers.
- 8) Periodic printing of names of donors to various projects.
- 9) Include a photo of people being impacted and holding a thank you sign.
- 10) Be specific about who is being helped and how the gift is being used.

It is right to thank donors. It is courteous to thank donors. Thanking donors continues to build the bonds of friendship and interest. Consider dedicating a portion of your schedule, or a staff person or volunteer, or a group to the task of thanking and remembering donors. Thanking donor will even lead to future gifts as Tony’s story shows.

10 Keys to Successful Boards

Introduction: Recruiting, training, and keeping The importance and benefits of saying thank you.

Purposes: Review importance of boards and councils
Review 10 key elements of successful council building
Discuss and offer Q&A

For: Presidents, Boards, Leaders, Presidents/Principals, Development Directors

By: Mark Filips
President
VisionWorks Fundraising
Omaha, Nebraska
markf@VisionWorksCo.com
402.999.2970

Outline: 10 Keys to Successful Boards

What are some keys to effective Foundation Board? Read on...

1. Effective Nominating Committee – The nominating committee should be well organized, have a clear sense of recruiting priorities as well as expectations for individual board members especially in the area of fund-raising.

2. Enlist Board Members Who Share Your Vision – It is important to recruit Board members who already support the organizations purpose and vision for the future. This is not the time to work to make converts. This doesn't mean that over the years prospective Board members can't be groomed, but bring them on board when they are ready and supportive.

3. Recruit Board Members Who Work Well with Others – It is important to recruit Board members who have healthy personalities, who work well with others, who are amiable and friendly, who know how to communicate with others, and who know how to compromise and work things out amicably with others. Try to avoid abrasive, problematic personalities.

4. Recruit the Most Prominent, Successful People Possible – The Board members are the key representatives of your Foundation. Recruit the best people possible. Recruit busy, self-starting, productive, and successful people.

5. Recruit Big Thinkers – Every Foundation or Advancement Program and organization can grow more and do more. Enlist Board members who see the opportunities for growth.

6. Enlist Board Members Who Can Open Doors – Board members can open doors to prospective donors, to leaders in the community, and to greater numbers of volunteers. Recruit connected and social Board members.

7. Orient Board Members – Once Board members have been recruited, take a morning, evening, day, or a weekend for orientation. Review the organization's history; its mission, vision, values, and strategic plan; review the Foundation's main activities; introduce them to other key staff members; and share with them the strategic plan for the future.

8. Rotation Plan – There should be a rotation plan in place to bring new Board members on every year. A Board member term could be for three years, with a maximum of two three-year terms. In a rapidly changing world, rotation of Board members brings new people, new ideas, new perspectives, and new connections.

9. Large Enough Board – While it is difficult to specify an appropriate size for all boards, in general, a board should range in number from 10 to 20 members. You need enough members to form the core of the committees and, in general, share in the other work of the board. We also need sufficient numbers to reflect the desired diversity in the board as well as assure the range of viewpoints that spurs innovation and creativity in board planning and decision-making.

10. Plan, Plan, Plan – The main job of the Board is to guide and oversee the Director and Foundation Team, raise money to benefit the organization, open doors to new donors, and support the Foundation strategic planning process.

8 Key Summertime Development Activities!

Introduction: Summertime is a great time for development professionals to make plans and prepare for the new fiscal year.

Purposes: Review key summertime activities of Development Offices
Provide time for discussion/Q&A

For: Presidents, Boards, Leaders, Presidents/Principals, Development Directors

By: Mark Filips
President
VisionWorks Fundraising
Omaha, Nebraska
markf@VisionWorksCo.com
402.999.2970

Outline: 8 Key Summertime Development Activities!

Summertime is a great time for your organization's development and fundraising program to evaluate the past year's activities and plan for the upcoming fiscal year. Use your time well by doing these following activities:

- 1. Update Your List of Publics and Supporters** – Your “publics” are those people or groups who have some kind of interest in seeing your organization succeed. You can consider your publics your circles of supporters. Update the contact information of such publics as your: A) Boards and committee members, B) Staff, C) Volunteers, D) Current members, E) Alumni or previous active members, F) Neighbors, G) Local business leaders, and H) Local political leaders. Each of these groups should be communicated with periodically.
- 2. Evaluate and Plan** – Review all your activities for the previous year and make plans for the coming fiscal year in these areas: A) Development Oversight Board, B) Alumni, C) Annual Fund (All the fundraisers you do each year), D) Marketing/Communications, E) Estate Planning, F) Major Gifts, and G) Recruitment. Review what worked and what didn't. Dream about what you'd like to add. Consider what you need to oversee and what can be delegated to other groups or volunteers.
- 3. Development Oversight Planning** – Your Oversight Board keeps you focused on the main tasks of your development program and supports its overall efforts. Spend a retreat day or weekend with them, your staff and your volunteer leaders in coming up with the master plan for the upcoming year. With the previous year's plan in hand, you may ask: What worked well? What do you want to keep? What do you want to eliminate? What should you add?
- 4. Alumni** – Evaluate your past alumni events and consider what you might add in the way of new alumni activities. Consider activities that build alumni ties to your organization and that raise money in support of your organization.
- 5. Annual Fund** – Most churches, schools, and organizations have many fundraisers. They are important for your organization's support. But they are also important because they tie so many volunteers and supporters to your organization! Create your Annual Fund calendar for the upcoming fiscal year that includes such things as: fundraisers: fundraising letters, phone-a-thons, development dinners, raffles... Consider what is vital for your office to oversee and what can be delegated to competent volunteers.
- 6. Estate Planning** – Sad to say, the estate planning component of many organizations and development programs is the least developed of many development efforts. But it can also be the most impactful! Many organizations do a fantastic job in this area. Create your estate planning calendar that involves letters and pamphlets, workshops, Legacy Society enrollment drives...
- 7. Marketing and Communications** – What kinds of communication and marketing activities are you employing now: newsletters, electronic newsletters, newspaper articles, radio, TV, billboards, Twitter, Facebook...? Review what you're doing, make your plans for your various communications activities, and calendar your activities for the year. Employ all methods possible, but do not neglect one-on-ones and group meetings.

Outline: 8 Key Summertime Development Activities!, Cont'd

8. Major Gifts – As a Major Gifts Committee, identify your top 25 or 50 or 100 supporters and make plans during the year to meet with them on a regular basis for cocktail hours and breakfasts, lunches or dinners to build the bonds of friendship, receive their input, and share your organization's plans and dreams with them.

8 Fundraising Strategies for the New Year!

Introduction: The New Year is an important time to make your plans for your advancement and fundraising activities for the year.

Purposes: Review major fundraising initiatives for New Year
Flesh out initiatives
Provide time for discussion and Q&A

For: Presidents, Boards, Leaders, Presidents/Principals, Development Directors

By: Mark Filips
President
VisionWorks Fundraising
Omaha, Nebraska
markf@VisionWorksCo.com
402.999.2970

Outline: 8 Fundraising Strategies for the New Year!

- 1. Cultivate Your Major Donors** – Identify your top 50-100 major donors prospects. Hold periodic gatherings (breakfasts, lunches, cocktail hours, and dinners) to: A) Get to know your major donor prospects, B) Form a relationship with them, C) Inform them of your plans and successes, and D) Determine their interests.
- 2. Major Gifts Fund Drive** – Do you have a major project in mind? Do you need to buy some land, build, renovate, establish a new ministry, establish a scholarship fund...? Consider presenting your sizable and bold special project(s) to your major donors and ask them to prayerfully consider an investment in the vision/project.
- 3. Capital Campaign** – If you do strategic planning and are interested in growing your community, then at some time you will need to consider a capital campaign. Possible projects could include land acquisition, new buildings, building expansions and renovations, endowments, ministry programs, scholarship funds, debt retirement... A bold vision, good campaign leadership, and a well run capital campaign can yield three to six times your income, or more!
- 4. Inaugurate a Fundraising Gala** – Organize and plan a large gala that includes financial sponsors, a social hour, an elegant dinner, a speaker and/or entertainment, and a silent auction. Sell tickets for individuals and tables. And consider dedicating the proceeds each year to a specific program or project.
- 5. Send Out Quarterly Fundraising Letters** - Each quarter send out a short letter highlighting your plans and accomplishments and a Wish List of 10 items ranging from \$25 to \$25,000. Include a donor card and envelope.
- 6. Sponsor an Estate Planning Workshop** – Depending on the size of your community, consider one, two or three Estate Planning Workshops a year. Plan an hour-and-a-half long meeting with 30 minutes of light refreshments and an hour long panel presentation by the director and an accountant, a financial representative and an attorney. Close with a strong appeal from the director that asks everyone to remember your community and its mission in a portion of their estate plan.
- 7. Establish a Legacy Society** – To establish a Legacy Society, use your newsletters or website and from the estate planning workshop to determine who has remembered your organization in their wills. Then, two to four times a year, hold special Legacy Society gatherings (breakfasts, lunches, cocktails, and dinners) to update the members on your community's dreams, goals and plans.
- 8. Consider an Advancement Review**– An outside review of your advancement program can increase its effectiveness by reminding you of your vision and mission, suggesting the addition of new teams and activities, modifying or discontinuing struggling efforts, and creating actionable plans for the future.

8 Keys to Successful Organizations!

Introduction: There are all kinds of groups and organizations doing amazing things throughout the country. Some are more successful than others. What are the elements of a successful organization and development program? Here are some of the keys.

Purposes: Review key elements of any successful development programs

Discuss, Q&A

Point to resources

For: Presidents, Boards, Leaders, Presidents/Principals, Development Directors

By: Mark Filips

President

VisionWorks Fundraising

Omaha, Nebraska

markf@VisionWorksCo.com

402.999.2970

Outline: 8 Keys to Successful Organizations!

There are all kinds of groups and organizations doing amazing things throughout the country. Some are more successful than others. What are the elements of a successful organization and development program? Read on for the answers.

1. A Compelling Vision – All successful organizations need to have a vision that they can share with others. And the vision must be expressed in the most compelling terms possible. What's your group's purpose? Now put flesh on it. Paint a picture of the outcomes your group produces. If you're a college prep school, then your mission may be to help young people reach their highest potential spiritually/emotionally, intellectually, socially and physically/athletically. Paint a picture of what successful outcomes look like in all of those areas. Or, give examples of young people who've grown and changed spiritually, intellectually, emotionally, socially and physically through your programs. What do your success stories look like if you're a school, a church, an environmental organization, a family support organization, a civic organization...?

2. Plan, Plan, Plan – An organization that wants to be successful and have a future must plan. What is your overall goal? What are your sub-goals? What are the steps you can take in the next one, three and five years to reach your goals? Include all segments of your organization in your planning and goal setting. And after you've created your plan, revisit it monthly, quarterly and yearly.

3. A Quality Product – Successful organizations must aim for the creation of quality “products” and outcomes. Whether those products are software programs, cars, graduates, healthy families, sustainable environments, vibrant cities or... What are you creating? How can you improve your product/outcome? How can you move from your current level to a higher level? What are the steps to higher quality outcomes?

4. Expert Management – Well-run organizations need visionary leaders and effective management. Are your leaders good at communicating with the public? Are they able to “cast the vision” and remind everyone of your lofty goals? Are they able to inspire and mobilize others toward the achievement of those goals? Are they respectful and enlightened in their leadership? Are they good and efficient stewards of all the organization's human, physical and financial resources? Good leaders are respected, inspire others, are humane, provide for the harmonious working of the members, oversee the quest for excellent products, services and outcomes, and are good stewards of all the resources at their command.

5. Broadcast Your Successes Stakeholders – Effective organizations need to trumpet their successes and report to all their stakeholders. Who are your stakeholders? They are the people interested in your work and outcomes. If you're a school, your stakeholders may be: students, parents, prospective parents, grandparents, alumni, donors, major donors, community leaders, business leaders, and more. Communicate with all these groups regularly through mailings, newsletters, electronic newsletters, annual reports, informational meetings, and more.

6. Build Relationships – Leaders and organizations must build strong relationships with your stakeholders and donors. As you relate to your stakeholders and donors, you will want to know who they are, their stories, their gifts, their stakes in your organization and its outcomes, what lights them up, and how they can share their gifts with your cause.

Outline: 8 Keys to Successful Organizations!, Cont'd

7. Ask for Support – All your efforts at sharing your vision, planning and goal-setting, producing quality “products” and outcomes, managing well, and telling your story prepare you to ask for financial support. Know your donors. Know what lights them up. Know their financial capacity. And don’t be afraid to ask for gifts! If you’re too shy to ask, rest assured there are a dozen people behind lined up and ready to ask them for their gifts.

8. Thank Creatively and Often! – Thank your supporters and donors – all of them – in as many ways as possible. Never take anyone for granted! A true story will suffice. I was working with an organization its second capital campaign. A man made a \$1 million gift to the first campaign. Naturally, the leaders of the organization thought that the donor would be interested in another million-dollar gift. The leaders of the organization went out to meet him and asked him a million dollar gift. He turned them down instantly. Why? You guessed it. He turned them down because – incredibly – he was not thanked for his first million-dollar gift. Through notes, public acknowledgements, dinners, phone calls, cards from children, special mementoes... make sure to thank everyone for their gifts.