



Capital Development Workbook

**Your Guide to Sustained Major Gift
Fundraising Success**



Capital Development

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Organizing Principles

Do you want to have a more successful major gifts program for your camp?

Wouldn't you like to have major donors who are ready to answer the call when you have an unexpected opportunity to transform your camp?

Your **Capital Development Workbook** is designed to help you gain an enlightened practitioner's understanding of the capital development process and to help you build or strengthen your capacity to acquire major gifts. The goal is gifts that, in and of themselves, make a difference for your camp. The process is called capital development.

The first section, Core Frameworks, provides the conceptual framework that establishes the context for building your capital development program. For the seasoned fundraiser or non-profit executive, it provides a quick, comprehensive review of the fundamentals that make fundraising successful. For a newer fundraiser or non-profit executive, it gives you a compact look at the fundamentals that will help you frame and implement your program.

The second section, Process Management, presents the step by step "mechanics" you need to put your capital development process into practice. Each step is accompanied by a model chart to let you get started immediately. The charts create the system that allows you to focus on the actions that you need to be taking to grow your capital gifts program and manage the prospective donors that are at the heart of the process.

Successful capital development depends on systematically identifying those prospective donors whose high net worth will enable them to make gifts that can transform your organization. The ongoing identification and qualification process is so important that your guide devotes the third section to providing a model identification process for your use.

Each section will conclude with responses to some frequently asked questions.

After the frequently asked questions in section three, you will find a section on special considerations. These are really frequently asked questions that require a bit longer answer than traditional FAQs related to capital development.

- How can I evaluate my camp's capital development potential?
- What can I get out of a feasibility study and what should I do to prepare for one?
- What should I expect from my mentor or a fundraising consultant?

The Capital Development Workbook is itself a work in progress. Please send questions, comments and stories of your progress to ***hs2consulting@aol.com***.



What Is Capital Development?

Capital development is the interrelated set of activities used to secure **gifts that are of the size needed** to insure your camp will have the people, programs and facilities needed for success.

For discussion purposes, a “capital” gift is defined as a gift of \$100,000 or more given to support a specific priority project. Ideally, such gifts will be paid outright but can also be paid over a period of two to five years.

Capital gifts support priorities that contribute directly to the development of the camp’s asset base:

- New or renewed facilities
- Endowments
- Creation of new programs or positions.

Capital development is a sustained activity that avoids the ups and downs that are frequently experienced with traditional campaign cycles. While capital development has greater visibility when a major gifts campaign is in public mode and may be less visible in private mode, it is no less intense. The critical assumption about capital development is that **it never stops!**

Creating a successful capital development program is the single most important investment your camp will make in creating a productive, sustained future of major gift philanthropy for your camp.



Capital Development Workbook

Part 1: CORE FRAMEWORKS



Core Framework #1: Guiding Principles

Focus on High Net Worth Prospects. The first maxim in capital development is that an organization and its staff can spend a lot of time changing attitudes, but they cannot create wealth. Capital development requires that the organization invest heavily of time and resources identifying, qualifying and engaging HNW individuals to acquire gifts of the size needed for success. Capital gifts are not acquired effectively through casual or sporadic efforts.

All gifts are not equal. Developing a table of needed gifts is an essential exercise that reminds us constantly that without gifts of the level indicated, the fundraising venture's potential for success is greatly reduced. For example:

- To raise \$15.0 million for a capital priority you will need:
 - » One gift of \$3.0 M
 - » Two or three gifts of \$2.0 M
 - » Four or five gifts of \$1.0 M
 - » Five to eight gifts of \$500,000
 - » Ten or more gifts of \$100,000

Variations in the actual makeup of the gifts received will occur but the basic shape of the table and the underlying philosophy are always present.

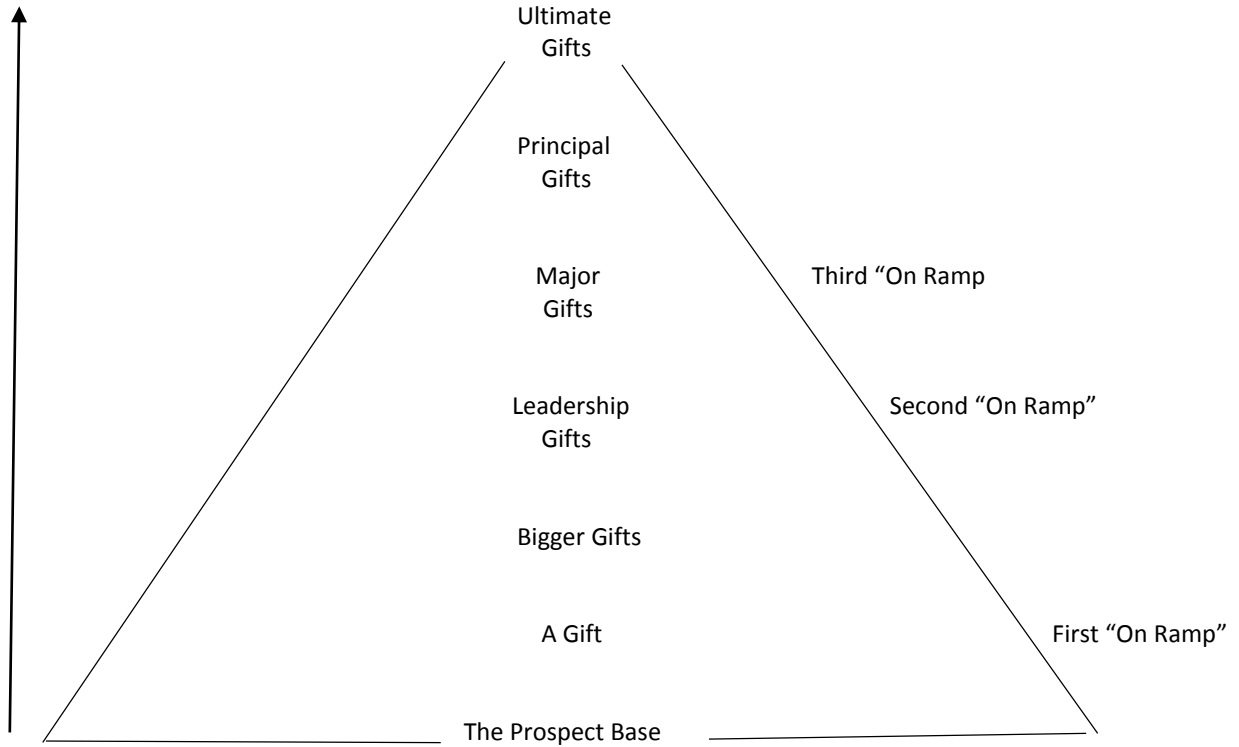
Successful capital fundraising starts at the top. Acquisition of one or more upper level principal gifts validates your campaign's agenda and sets the standard for others to give. Once success is assured, organizations often invite all their alumni, friends and supporters to give and share in the enthusiasm of an important project well done.

Follow the Process. Successful capital development follows five basic steps:

1. Select priorities for capital development with care. Capital development priorities should:
 - a. Affirm and advance your camp's mission
 - b. Reflect your camp's core values
 - c. Make a difference in the quality of the camping experience and the impact that it has on campers
2. Identify high net worth individuals who have the capacity to make gifts of the size that insure success
3. Qualify those prospective donors by understanding the nature of their wealth, their relationships, interests, philanthropic history, etc.
4. Develop an individual plan for engaging those prospective donors to prepare them for a capital gift ask. Determine who is to ask who, for what and when.
5. Make the solicitation! HNW donors want to make a difference and they are looking to you for leadership and counsel.

Core Framework #2: The Basic Fundraising Process

The traditional approach to fundraising. The process is bottom-up to develop a broad base of support and provide a ladder for prospect development



Primary Goals

- Acquire new donors (N per year)
- Get donors to give regularly (90+% retention)
- Get donors to give more (10% of prior year upgrade to larger gift)
- Establish a secure base of leadership donors (\$1,800 or more – five-year goal of N)
- Feed the major gifts process (identify and cultivate the 5%)
- Communicate, communicate, communicate!

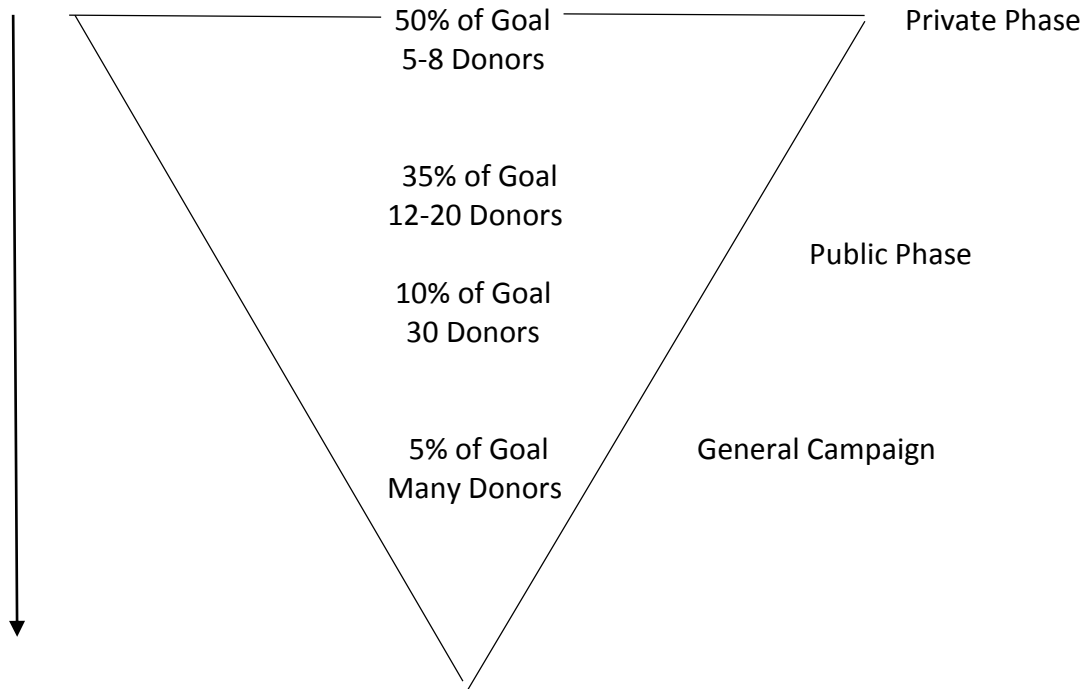
Table of Needed Gifts: Short-term goal -- \$225,000 per year

The table of needed gifts for current support fundraising is flatter and broader than that for capital development because it depends on smaller gifts from much, much larger numbers of donors.

# Gifts	Gift Size	Gift Total	Cumulative Total	
3	\$18,000	\$54,000	\$ 54,000	Personal
6	\$ 5,400	\$32,400	\$ 86,400	Ask
10	\$ 3,600	\$36,000	\$122,400	
20	\$ 1,800	\$36,000	\$158,400	
35	\$ 1,000	\$35,000	\$193,400	
40	\$ 540	\$21,600	\$215,000	"Media"
Many	Up to \$ 180	\$10,000	\$202,000	Ask



Core Framework #3: Capital Development Turns the Process on its Head



Primary Goals

- Elevate Your Camp to a position of a “prized” philanthropy among the communities it serves
- Keep Your Camp competitive in terms of facilities, programs and people
- Maintain a posture of capital development readiness at all times

Table of Needed Gifts: Three-to-five Year Goal -- \$7,600,000

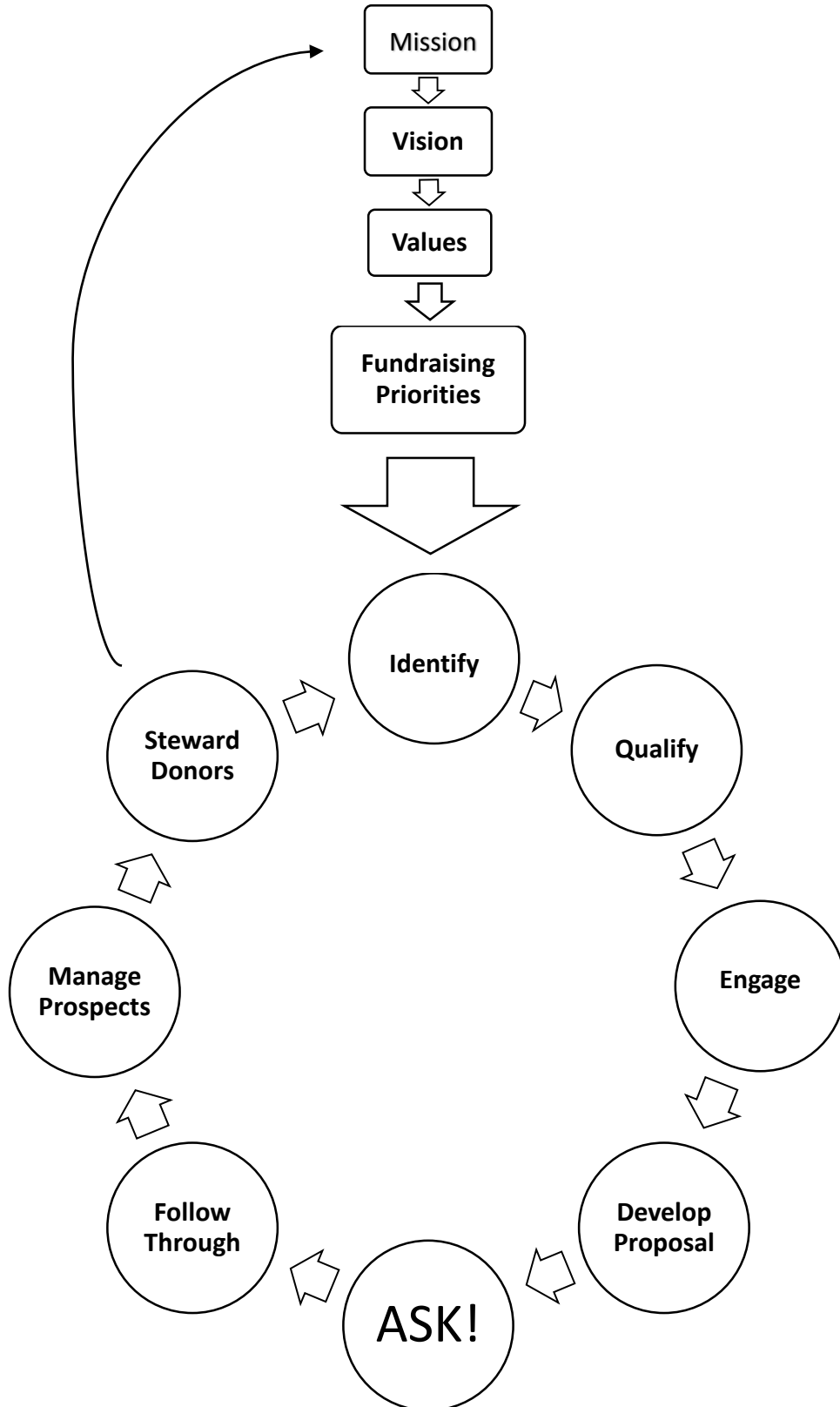
The table of needed gifts for capital development is much sharper and less broad because capital fundraising success depends on very large gifts from a very small number of donors.

# Gifts**	Gift Size	Gift Total	Cumulative Total
1	\$1,500,000	\$1,500,000	\$1,500,000
2	\$1,000,000	\$2,000,000	\$3,500,000
3	\$ 500,000	\$1,500,000	\$5,000,000
4	\$ 250,000	\$1,000,000	\$6,000,000
8	\$ 100,000	\$ 800,000	\$6,800,000 (89%)
10	\$ 50,000	\$ 500,000	\$7,300,000
12	\$ 25,000	\$ 300,000	\$7,600,000

Prospect to Gift Ratios**

- Mature fundraising programs need 1.5 prospects for each gift of \$500,000 or more and 2.0-2.5 prospects for all other capital gifts
- Start-up fundraising programs need 3.0 prospects for each gift of \$500,000 or more and 4.0-5.0 prospects for all other capital gifts

Core Framework #4: The Cycle of Successful Prospect Management





Definitions: The Prospect Management Cycle

Mission: The impact that your camp has; why it is important; the benefits of success

Vision: Your aspirations for your camp's future; what you want your camp to be in the future

Values: The characteristics you want in your people and programs

Fundraising Priorities: The privately funded resources you need to support your people and programs and achieve your mission

Identify: Find the individuals and organizations who have some reason to relate to your camp and that have the financial resources to make major gifts

Qualify: Elicit the information about your capital gift prospects that you need to develop a plan for prospect engagement

Engage: Get your prospect involved in your camp's life, values and aspirations

Proposal: The discipline of writing out who will ask whom for what and why; the development of the case for support for use with each individual capital gift prospect

ASK: Invite the prospective donor to change your camp and positively advance its capacity for mission by supporting the development of its people, programs and / or facilities

Follow-through: Capital gift requests are rarely answered immediately; follow through on any needed action identified in the solicitation meeting; constant attention over time to continuing to build your camp's relationship with the prospective donor

Manage Prospects: Develop a systematic approach to maintaining your prospect relationships and keeping the gift discussion process active and timely

Steward Donors: Maintain the relationship with your donors, keep them involved and make certain that they are not only well thanked but also aware of the difference their gift(s) make



Core Framework #5: The Capital Development Cycle

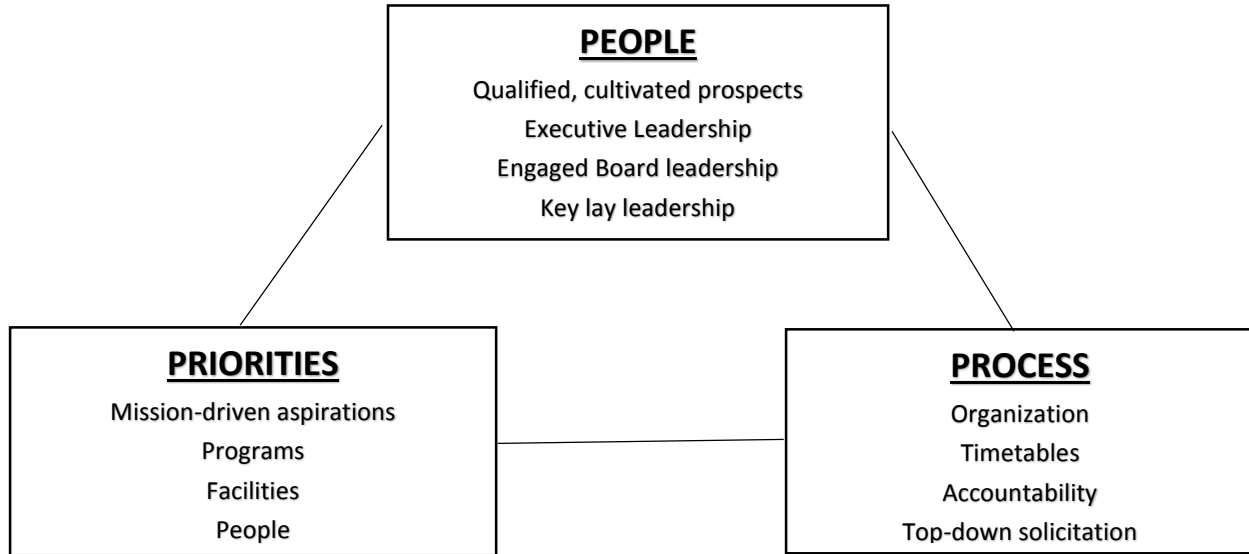
Successful capital development, the systematic ongoing acquisition of major gifts that support your camp’s growth and development is a sustained process. At the same time, there is a cyclical nature to the process that adds energy and focus and keeps it fresh. That cycle starts with the creation or renewal of your strategic plan – your ongoing roadmap into the future. The cycle gives you natural way -points to assess progress on priorities, identify new directions and keep the relationships among your people and your programs fresh and alive.

Action	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Strategic Plan	/////	//	//	//	//	/////
Priorities Development	/////	//	/	/	//	/////
Case for Support	/////	//	/	/	/	/////
Prospect Identification	////////////////////////////////////		//	//	//	/////
Feasibility		/////	/	/	/	/
Prospect Cultivation	////////////////////////////////////					
Solicitation	/	////////////////////////////////////		///		///
Donor Stewardship	////////////////////////////////////					
Public Awareness	///	//////// //////////////////////////////////				///

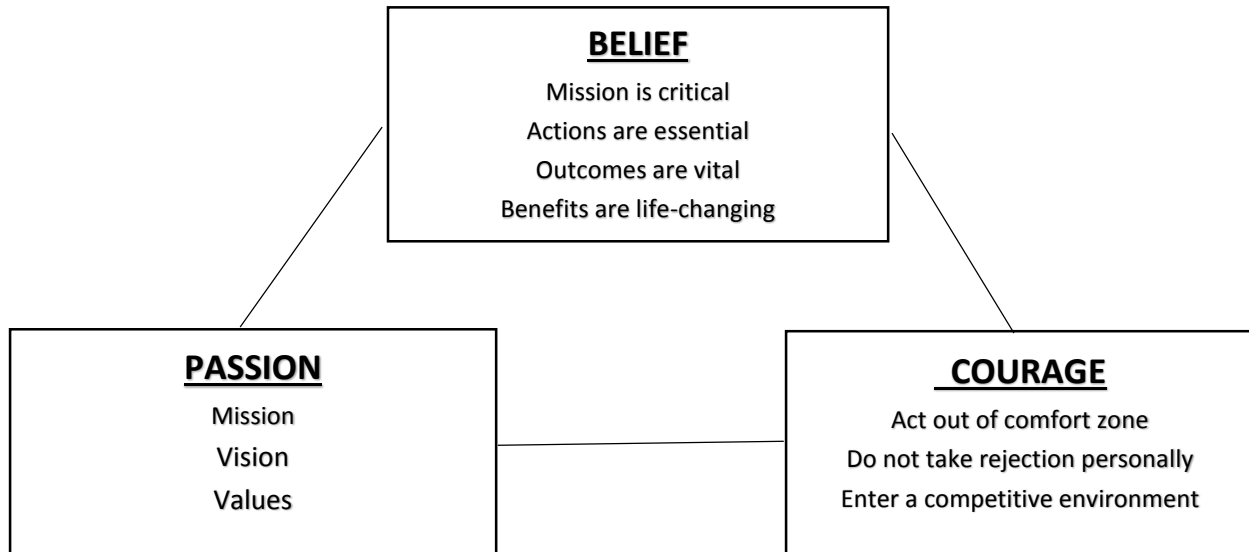
The Cycle repeats itself every six-to-seven years – or, perhaps, even every two or three years depending on your level of success. Campaigns rarely follow the predicted course – there is no hard and fast template, yet, viewed in retrospect, the developmental sequence is almost always apparent.

Core Frameworks: Frequently Asked Questions

What are the technical keys to success?



What are the human keys to success





Capital Development Workbook

Part 2: PROCESS GUIDE



Remember Your Guiding Principles

Focus on High Net Worth Prospects

Follow the Process

- Articulate your mission, vision and values
- Establish your priorities for philanthropy
 - Identify high new worth prospects
 - Qualify those prospects
 - Establish individual engagement plans
 - ASK for an investment in the future
 - Follow through with your prospects
 - Steward all donors
- Maintain your capital gift process at all times

All gifts are not equal

Successful capital development fundraising starts at the top



Step 1: Establish Your Priorities For Philanthropy

Capital development is an intense, intentional fundraising process concentrating on the identification, qualification, cultivation, solicitation and stewardship of high net worth donors with the financial capacity to make gifts of \$100,000 or more to meet Your Camp's highest priority developmental objectives. For discussion purposes, we will assume that the capital gift goal is \$8 – \$15 million to be received over a three to five year period. Securing gifts to meet a goal of this magnitude requires constant, disciplined focus on the capital gifts process.

Capital Gift Priorities:

- Your aspirations for growth and development grow out of your mission, vision and values. Establishing clear, compelling priorities is essential to success. Involve prospective donors and key volunteers in this process from the very beginning to create a sense of energy and ownership
- Capital development is the primary vehicle for providing the extraordinary resources that empower Your Camp to fulfil its mission. Engage your capital gifts prospects in conversations about your people, your programs and the impact they have on camper's lives, the lives of their families and the communities they represent. Discussions of the resources you need to succeed will follow naturally.

Short-term goals for your capital development program:

- Establish a high net worth prospect list, cultivate that list intensely and develop a disciplined program of principal gift solicitation.
- Secure cash and commitments for Your Camp's most immediate developmental priority(ies)
- Create immediate "wins"

Longer-term Goal:

- Institutionalize a systematic capital gifts program that positions Your Camp, on a timely, sustained basis, to fund its extraordinary needs for people, programs and facilities now and, as needs and opportunities emerge, in the future.



Step 2. Identify High Net Worth Prospects

Set Up Your Master Capital Gift Prospect List

Your capital development prospect list should contain the names and basic information about individuals who have the capacity to make gift of \$100,000 or more. This list will always be dynamic. Each year you will add prospects and each year you will take some off.

- Each prospect will have an information profile that contains as much detailed personal and financial background as possible.
- Each prospect will have an individual plan for cultivation with anticipated timetable leading to solicitation
- Progress with each prospect will be tracked on a Prospect Tracking Form; “Your Capital Development Top 100” list will be reviewed regularly by your Capital Development Leadership Team.

Q: How do I identify high net worth prospects?

A: The answer to this question is so important that your *Capital Development Workbook* dedicates an entire section to it. But here are a couple of quick pointers before you go any further.

- Look at your current donor lists. Who are your top 100 donors in terms of their lifetime giving? Who has given you a gift of \$1,000 or more? Who has given to you every year for at least ten years, regardless of the amount?
 - Run the lists to answer these three questions and sit down with two or three lay leaders who know the world of wealth and ask them, “Who on this list do you think could give our camp \$100,000 or more if the purpose was right and they were favorable disposed?”
 - Or you could ask your lay leaders to assess the individuals on your lists in response to the question, “Who on these lists could give our camp a really big gift if they made our camp one of their top three philanthropies for a period of three to five years?”
- You should consider using a public records search vehicle like Wealth Engine or Donor Search to evaluate the people in your data base. The information you get will be quite remarkable. You can then make lists of the top rated individuals and repeat the process above.
- As you identify prospective donors, enter them on your master list (see the next step) and start moving them through the capital development process.
- Remember, these are people who have the financial potential to make a major difference in your camp’s life and for whom, most of them at least, believe that what your camp does is important.
- Follow the process with the utmost respect, dignity and confidentiality for each prospective donor. Each is different and each is worth your very best efforts.



Capital Development: Step 3 – Qualify Prospective Capital Gift Prospects

The more you know about each of your prospective capital gift donors, the better your chances of developing a successful approach to engaging their interest and securing their support. As you get information about “Who?” can make a difference in terms of capital giving, you should also be listening to and asking for the information that helps you better understand each of your prospective capital gift donors. Chart 2 gives you a simple but effective way to organize your information gathering process.

As you move further into the capital development process, your prospective donors themselves will become primary sources of information. Learn to use three questions effectively:

- “What do you think?” is perhaps the most engaging question you can ask. You want to know what your lay leaders think about your priorities, what they think about your plan of action, what they think about potential donors, what they think about what they think! What do you think is a wonderful open ended question that lets you gather all sorts of information to help you do your job of capital development better.
- “What would it take?” “What would it take?” brings the conversation into a much sharper, more personal focus. For example, What would it take to get you more involved? What would it take to get Irving and Ruth more involved? What would it take for you to ?
- “If then?” There are few questions better than “If then?” because “If/then” allows you to propose a possibility and explore how the person with whom you are talking might enter into the enterprise. For example, “If Irving and Ruth were to get interested in making sure no potential camper was left out for financial reasons, then what might they do?”

Effective listening, effective information gathering is an art. Learn to listen with the ears of your heart as well as your head. Be listening for what is meant as well as what is said. Be patient and let those with whom you are working take their time.

Keep all of your qualifying information up to date. Learn who your best sources are and keep them well cared for.



Chart 2 – **CONFIDENTIAL** Individual Capital Gift Prospect Qualification Form

Name	Planning Information	Special Considerations
Address		
Contact Information		
Familial Information		
Relationship / Networking Information		
Financial Information		
Interests		
Volunteer Activity		
Philanthropic Activity		
Relationship(s) to Our Camp		
Other Information		



Capital Development: Step 4 – Develop Individual Cultivation and Solicitation Plan

One of the axioms of good organizational development is that people are more likely to support decisions that they have helped make. The greater the level of engagement your capital development prospects has with your camp, the more likely those prospects are to make transformative gifts.

The creation of effective plan for cultivating your prospects is very much an individual by individual effort. Using the information you gathered as you qualified your prospects, develop a plan of action for engaging each prospect. Action steps can be described as **primary** or **secondary**. Primary action steps are those that you take to be in the forefront of your prospect's attention. Examples of effective primary actions steps include:

- Membership on the board of directors or a board committee or task force
- Attendance at board meetings
- Individual meeting with the chief executive/camp director or board chair
- Involvement in strategic and capital planning
- Invitation to make a special presentation for the board or a group of alumni
- Requests for advice and counsel on specific issues or initiatives

You may be able to project two or three primary action steps in advance – always keeping in mind that your will review your cultivation and solicitation plan in light of each interchange that you have with your capital development prospects.

Secondary action steps are those actions that are part of group activities or undertakings. Secondary action steps include:

- Invitations to annual meetings or attendance at alumni or camp shabbats; when a capital development prospect accepts one of these invitations, it may provide opportunity for a primary action step as well
- Personal notes from campers, camp staff and executive staff; you want your prospects to feel very much a part of the life of your camp and the impact it has on campers, staff and families
- Sending annual reports, summer videos, etc. with a personal not – not as part of a mass distribution

Chart 3 provides a sample form for use in planning your cultivation and solicitation action steps.

Good capital prospect development is always on the lookout for effective ways of involving high net worth donors. Capital Development Notebook Entry #1 provides an outline for using your camp's master plan or strategic plan as a focal point for primary action that has the added advantage of getting small groups of your capital prospects together and generating mutual energy and interest.



Capital Development: Form 3: Individual Prospect Development Action Planning Form

Name _____ Capacity Code _____ Readiness Code _____

Address _____

Contact Information _____

Long Term Goal _____

Immediate Goal _____

Plan Overview _____

Key Contacts and Special Considerations _____

Overview of Action Steps

Action Step

Timetable



Capital Development Notebook # 1

Executive Advisory Series: A Sample Strategy to Engage High Net Worth Prospects

Goals

- Provide an ongoing vehicle / forum for Your Camp to draw key leaders and high net worth prospects into creating the camp's future
- Establish a platform to facilitate follow-up and sustained engagement
- Create a cadre of well-informed advocates who can assist with all phases of capital development

Format

- Breakfast, lunch meetings, cocktails, small group dinners
- Strategic Agenda Briefing sent to participants in advance
- Welcome and introductions
- Director provides executive summary with emphasis on mission and vision
- Board Chair / Director guides discussion
 - What do you like best about our plans?
 - How would you strengthen them?
 - Who else would you suggest we include in the EAS series?
 - Do you have other thoughts and suggestions?
- Board Chair / Director does micro summary, thanks participants and hands out tchotchkes.

Frequency

- Minimum of three per month

Follow-up

- Courtesy note within the week
- Backstop with posting on web and monthly Director's communique
- Staff follow up with key participants
- Keep relationship maps up to date
 - Look/listen for opportunity to establish Capital Development Task Force



Capital Development: Step 5 – Implement the Engagement Plan

You should have a three to five-person capital gifts committee or task force that regularly monitors progress and assesses the direction and timing of future action steps. The capital gifts committee/task force should include the camp director, board chair, primary development officer and one or two additional volunteers. The camp's executive staff should review progress on at least a month by month basis and have the full committee/task force review the list at least quarter by quarter.

A wise development officer once remarked that prospect development is the art of making the right things happen. Plans are only as good as their execution. Once a cultivation and solicitation plan is in place, responsibility for implementation should be clearly assigned. Form 4 provides an effective way for making certain that expectations for the action step have been clearly defined and the responsibility and time frame for the action have been clearly established.

The principal staff member or board member responsible implementation of the cultivation and solicitation plan should make certain that a call report form is completed as soon as possible after each action step takes place. Form 4 provides a guide for call reports. Each completed action step should prompt a review of the relationship between the prospect and your camp and guide the next step in the plan.

The temptation is to trust memory in the cultivation process but experience underscores the need for keeping accurate records and keeping the prospect development process moving in a timely and effective manner.

Caution! Good engagement plans are the road map for creating a lively, positive relationship between your camp and your high net worth prospects. In the process, relationships develop between the prospective donor and the camp director and other key staff. It is important to remember that the goal of the relationship is high financial value support of your camp, not friendship. High net worth individuals understand why your camp is showing them special attention and will be evaluating not only the dreams and aspirations you have for your camp but also the quality of your personal attention. When strong personal relationships develop over time, it is important to keep them consciously compartmentalized so they do not interfere with the cultivation and solicitation process.



Capital Development: Form 4 – Action Assignment Card

Assigned to _____

Date _____

Prospect _____

Due Date _____

Goal _____

Action Requested _____

Background _____

Result _____

Next Step(s) _____

Signature _____

Date _____



Capital Development: Form 4 – Action Assignment Card

Assigned to _____

Date _____

Prospect _____

Due Date _____

Goal _____

Action Requested _____

Background _____

Result _____

Next Step(s) _____

Signature _____

Date _____



Form 5: Call / Action Step Report Form

Name _____

Address _____

Contact Information _____

Donor Development Goal _____

Date / Location Scheduled _____ Time _____

Purpose / Goal of Visit / Action _____

Outcome _____

New Information _____

New Prospects / Referrals _____

Next Step(s) _____

Date _____ Staff / Volunteer _____



Capital Development: Step 6 – Ask for the Gift!

As a result of the cultivation process, your high net worth prospects should have a clear concept of what you are trying to accomplish, why and the benefits that will be generated by your success. As a result of the process, you should have a good understanding of your prospective donor's interests, values and attitudes toward your camp. ASKING is an intentional act that articulates the desired expectation you have for your prospect to make a financial commitment that has transformative potential for your camp.

The conversation about a potential game changing gift is a personal, face to face conversation. When you set up the appointment for a capital gift solicitation, you should let the prospect know that it is to be a conversation about an opportunity to make a profound difference in your camp's life and its capacity to serve your campers.

How do you know when to ask? Your prospects will frequently tell you when to ask. They may express great interest about a project or opportunity. They will sometimes say, "What can I do?" You may have reached a point where there is nothing more you can do unless you get the question, "Would you consider ...?" out on the table. Remember, the goal of the enterprise is to secure financial support for your camp at the level needed to accomplish your goals. You are asking for an investment in your camp and, through your camp, an investment in the Jewish future.

The best solicitations are usually made by a team, typically the camp director and the chair or a member of the board of directors. Such a team provides peer influence and project validity but it also provides two sets of eyes and ears to process the conversation, respond to questions and prepare next steps.

Once you have asked for a transformative investment, the prospective donor knows that you anticipate that they will make a major investment in your camp – if not now, then in the future, if not for this project, for a different project that helps create an exciting future.

Once you have asked for the gift, say no more. Listen with the ears of your head and your heart to what the prospective donor has to say. You will rarely learn more about your donor than when he/she/they respond to your request. Only rarely will you get "Yes!" in the solicitation conversation. Capital gift requests may take months to be resolved. Prospective donors often want to know more about a project. They may have questions about the timing of the project and/or the structure and timing of their gift.

Allowing the prospective donor to set the stage for the conversation will give you invaluable insight into their thought and values. It sets the stage for you to follow up on the conversation and be an active participant in the gift negotiation process. You may encounter objections or requests for clarification or information that will require timely, disciplined responses on your part. Assume the best and be prepared for each individual conversation that grows out of your solicitation.

A Few Quick Q & As: What do you do when the prospective donor says:

“I/we never thought about giving this much to the camp.”

We understand that this is a very large request but this is a time of very great opportunity and we hope that you will be part of helping us create an exciting future for the camp and our campers.” Then, stop and listen – remember, you are getting the information you need to maximize your potential for success, either now or later.

“That is more than I/we can possibly give.”

Would it help if you could make the gift over a two or three year period?”

“I/we can’t possibly make a gift like that right now. We are already committed to the max. We understand and appreciate your generosity to others. Your philanthropy is important to the community. If we were able to develop transitional funding, based on your commitment, we could defer the start of your giving. Would you like for us to explore what might be done?”

“This is an interesting project but I obviously will need to talk to my spouse/family about such a commitment”

We certainly expect that you would talk with your spouse/family. This is an opportunity that will transform our camp and we appreciate your serious consideration. Is there additional information that we could provide to help you with your conversations?”

“This is an interesting project but I’m just not sure it’s a project for me?”

We appreciate your consideration. What could we do to possibly increase your interest?”



Capital Development: Step 7: Follow Through and Follow Up

High net worth donors and high value capital gift requests require personal, immediate, disciplined follow through. Responding to requests for additional information provide opportunity for natural, personal follow up that allows you to find even more out about the prospective donor.

If you have not presented a formal proposal, it might be one of your immediate follow up steps. Requests for additional information should be fulfilled quickly and, if possible, delivered in person.

You should have a draft gift agreement for your prospective donor and her/his/their advisors to review and sign once agreement on the gift has been reached.

Your best prospective donor is the donor who has just made a big gift. Honoring commitments that you have made in the negotiation process should be done quickly and without prompting by the donor. Timely, effective gift related transactions are the next important step in cultivating future gift giving



Capital Development Workbook

Prospect Screening Initiative

Prepared For:
Jane B. Screener

December 2015



The Campaign for Our Camp **Confidential Prospect Screener's Guide**

Table of Contents

Key Volunteer Letter

Strategic Overview

Guide for Screeners

Prospect Screening List



November 2, 2015

DRAFT LETTER FROM KEY VOLUNTEER TO PROSPECTIVE SCREENERS

Ms. Jane B. Screener
1234 Springaire Road
Reston, VA 00000

Dear _____,

Over the past year, our camp's executive and board leadership have engaged in an intense period of strategic planning that culminated in the preparation of an energizing, forward-looking plan for camp growth and development. The first section of this guide, our strategic overview, will, I hope, give you a clearer sense of what our emerging aspirations for our camp are all about. Realizing these aspirations will require programmatic, human and physical resources beyond those generated by camp fees and annual fundraising.

As we prepare our plan to conduct a capital campaign for our camp, I am asking that you help us by participating in a confidential prospect identification project. We know that the financial success of a significant capital campaign will depend on our ability to identify and engage those people who, in and of themselves, can make pace-setting gifts – gifts that can change the game.

I hope that you will agree to work, in confidence, with me and our JCamp180 mentor, to identify those individuals who can provide the private resources for the people, programs and facilities that will insure our camp's capacity for mission for years to come. Please accept when one of our capital development task force members calls to set up an appointment for a confidential conversation. Be assured that there is no obligation beyond helping us with this most important step in our preparation. I am available any time to answer questions and I welcome your comments.

Thank you, in advance, for helping us prepare for a wonderful next chapter in fulfilling our vital mission for the Jewish Community.

Sincerely yours,

Walter Green
Capital Development Task Force Chair



The Campaign for Our Camp: A Strategic Prospectus

For almost 50 years, Our Camp has provided a premier summer camping experience for Jewish youth. Each year campers at our camp experience the *ruach* that is at the heart of our camp experience. They are engaged by a well-prepared staff in dynamic programs that make the summer a joyful, life affirming experience. They also experience ongoing innovations in programs, additions to the physical setting and enhancement to the spirit of the camp that keep their experiences fresh, fun and exciting.

As Our Camp builds on its record of success, it does so understanding that it is operating in the most challenging camping environment in its history. The camp's leaders recognize the inherent need to stay focused on the camp's mission of transforming the young lives that come into their care. They also strive to maintain the best of the camp's traditions while embracing a commitment to renewal and innovation that keeps the camp an attractive, contemporary choice for new generations of campers. Executive staff and the camp board are also grounded in the knowledge that summer camp is the single most effective experience campers can have to foster the self-confidence and personal growth that lead to a lifetime of active Judaism.

Commitments to the Future

In the past five years, Our Camp has:

- Used annual camper and parent survey assessments to enhance and strengthen the camper experience and provides new horizons for camper engagement
- Taken an assertive role in staff leadership development to provide the well-prepared, energized staff that maximize the camper experience
- Invested over \$3.0 million to upgrade housing for our professional and supervisory renovated camper cabins, improved outdoor worship space and upgraded our crafts center
- Doubled the amount we are providing for financial aid in order to make camp accessible for every qualified camper.

Working with its lay leadership and its JCamp180 mentor, Our Camp has developed a master plan for growth and development that rests on six fundamental commitments:

1. Our Camp will build on its outstanding record of success in fulfilling its mission of forming committed, active Jewish youth and fostering a new generation of Jewish leaders.
2. Our Camp will retain and enhance existing programs and add new programs in which campers learn new skills and are guided by excellent teachers, mentors and skill staff.
3. Our Camp will strengthen its already strong program of staff development and provide the human and physical resources that take it to a new level of performance.

4. Our Camp will be a primary choice when Jewish youth and their families are seeking a positive, joyful, meaningful Jewish experience.
5. Our Camp will provide the facilities that support and enhance robust, quality programs.
6. Our Camp will provide ongoing opportunities to engage Jewish youth in a camp setting and promote the opportunity to learn Jewishly by living Jewishly year-round.

Program Development for the Future

Our Camp will insure that its programs are up-to-date, attractive and focused on camper growth, skill building and leadership development.

- Additional emphasis will be placed on the role of outstanding mentors, role models and subject matter experts.
- Particular attention will be given to the growth and development of
 - . Recreation, fitness and nutrition
 - . Visual arts
 - . Aquatics
 - . Outdoor adventure
- Avenues will be sought to provide year-round opportunities for camper growth and leadership development with special attention to collaboration with religious schools.
- Financial aid funding will be increased to insure that no camper is denied access to the Our Camp experience based on financial limitations.
- Even greater attention will be given to the results of camper and parent satisfaction surveys to strengthen program growth and development.

Staff Development for the Future

Our Camp will provide an even greater focus on staff preparation and continuity to insure the most beneficial outcomes for each of our campers.

- Our Camp will invest significantly in creating a Machon Leadership Program that will be a cornerstone for staff development and provide preparation for our counselors in training.
- Our Camp will add a Machon educator and make certain that the use of outstanding mentors and role models will be a central element for Our Camp's overall program and for the Machon program in particular.
- Our Camp's program of staff development will emphasize leadership skills and team-building and promote the integration of knowledge and skills into staff practice.
- Staff development will become a year-round process for even more unit heads, counselors, coaches and specialty instructors.

Facilities Development for the Future

Our Camp will provide modern, updated and expanded program facilities and staff housing that support its programs and attract and retain high quality faculty, staff and subject matter experts. Anticipated facilities development includes:

- An indoor recreation, fitness and nutrition center that will emphasize lifelong health and wellness, creates opportunities for additional sports skills programming, and open up new opportunities for camp-wide programming.

- A Machon village Center that provides the educational, recreational and living space for Machon leadership participants.
- An apartment-style Faculty/Alumni Center that provides housing for up to 15 Jewish educators and specialty and instructional staff.
- Expanded aquatics facilities that strengthen both educational and recreational opportunities for all campers.
- A new visual arts center that provides space for visual arts, painting, photography, computer graphics and exhibition of camper work.
- Renovation of the camp's health center.

Estimated Costs for Our Camp's Master Plan

Program Category	Facilities	Programs	Core Strength
Mentors, role models and area experts	\$2,300,000	\$ 600,000	\$1,500,000
Recreation, fitness and nutrition	\$2,000,000	\$ 450,000	
Machon and staff leadership	\$1,500,000	\$ 300,000	\$ 500,000
Visual Arts Center	\$1,500,000	\$ 500,000	
Aquatics Center	\$1,200,000	\$ 300,000	
Health Center	\$ 450,000		
Financial Aid Endowment			\$2,000,000
Estimated Investment	\$8,950,000	\$2,150,000	\$4,000,000
		\$15,100,000	

A Vibrant Partnership for the Future

For the past three years, Our Camp has been working hard to develop regional lay leadership teams in each of its primary service regions. The results have been dramatic as lay leaders have assisted in meeting a financial challenge grant from JCamp180, strengthened the camp's public relations and marketing efforts and broadened the awareness of Our Camp's needs and opportunities among alumni, parents and friends.

- Sustained attention will be given to developing strength and depth for regional leadership teams and/or program-specific advisory groups.
- Increased lay leadership activity will be focused on
 - Camper acquisition
 - Promoting the value of the Our Camp experience
 - Facilities and program improvements
 - Scholarships and financial aid
 - Constituent and congregational relations
- The camp board will continue to pursue opportunities to contribute to the above activities and strengthen its own capacity for service.

Success and the Jewish Future

The successful implementation of Our Camp's Master Plan will insure that the **Our Camp Experience** will continue to produce outcomes that last a lifetime for campers, their families

and their communities. In fulfilling the goals of the Master Plan, Our Camp will increase its capacity to:

- Provide a unique “envelope” for campers and staff to live into the best versions of themselves!
- Energize campers and give them self-awareness and self-confidence that position them for a lifetime of rewarding Jewish living.
- Instill values and commitments that help develop a new generation of Jewish leaders!
- Enrich lives, strengthen families and support healthy Jewish communities for generations to come!



The Campaign for Our Camp **Confidential Guide for Prospect Screeners** December 2015

The Purpose

Every prospective giver and every prospective gift is important, regardless of the size of the gift. Successful capital fundraising, however, requires that we place our initial attention on the identification, qualification and engagement of donors who have the financial capacity to make “pace-setting gifts” – gifts of the size needed for success. Confidential, one-on-one prospect screening is essential to the implementation of an effective pace-setting gifts program. **Thank you for agreeing to be part of this process!**

The Task

The screening list provides you with the name and address of potential pace-setting donors. We are asking you to meet, in confidence, with a task force member to review a list of individuals that may have the capacity to make a significant gift. The question that should guide your thinking is, “If Ruth, or Paul or Paul and Ruth together made Our Camp their top philanthropic priority for a three-to-five-year period, how much do you think they could give?”

We understand that the information you provide is based on your best knowledge and judgement. For this reason, we have asked several people like you – people who have knowledge of the people in the Our Camp community – to review the list and contribute to our knowledge base. The capital development task force will consolidate the information gained and make their best estimates about the prospective donors’ *capacity to give*, their *areas of interest* and their *readiness to give*. **The information that you provide is never shared outside the campaign planning team.**

Reviewing the Prospect List

The confidential screening list that you have is a compilation of individuals within the broader Our Camp community who have made significant contributions in the past or been identified as having “capacity to make a significant gift.” For this stage of the campaign, we are focusing on individuals who have the capacity to make gifts of \$50,000 or more.

There are XXX names on the list. It will probably take you about an hour to complete your review. As you review the list and identify individuals about whom you have information to share, please use the following guide:

1. Place a **Prospect Screening Code (PSC)** in the first column next to the individual’s first name, using the following codes:
 - **A:** I believe this person could make a gift of \$1,000,000 or more
 - **B:** \$500,000 or more

- C: \$100,000 or more
 - D: \$50,000 or more
 - E: I can't suggest a gift level but think this person has pacesetting gift capacity
2. In the last column, "Notes," make any additional comments about individual prospects that you think would be helpful to the review and qualification process. For example:
- Two income family – both high wage earners
 - Inherited/family wealth
 - Just sold family business
 - Recently lost parent / spouse / other significant person
 - Good friend of _____
3. Who else would you suggest to review the list that you think could/would provide helpful information for this process? (Please jot down in margins or note section.)

There is also room for you to add names that may occur to you – this is not a complete list and we may well have missed someone who might help.

A Note about Capital Campaign Fundraising

Capital development (high net worth fundraising) will allow Our Camp to dream and accomplish far more than it can that if it depends solely on the annual fundraising campaign. Capital fundraising follows a logical cycle with variations for each individual prospective donor.

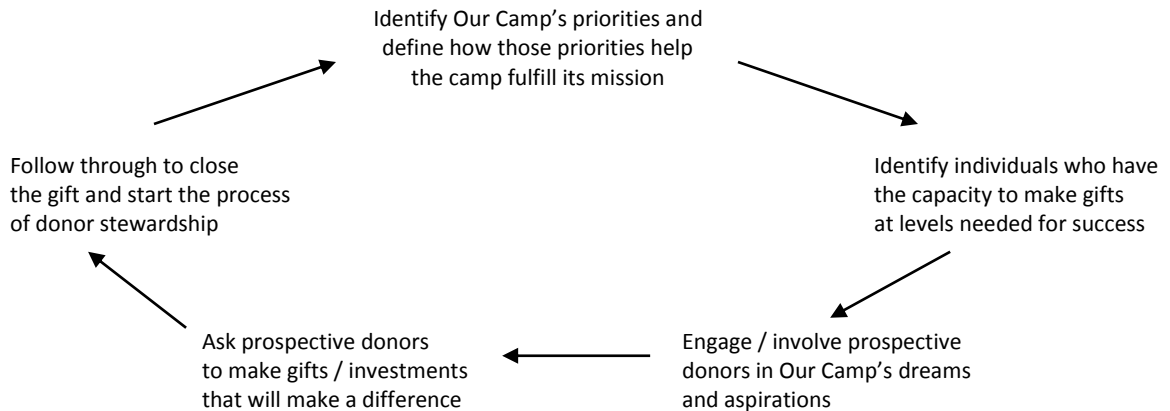


Table of Needed Gifts

A Table of Needed Gifts is a helpful guide that suggests that without gifts of the approximate size and number indicated, the capital fundraising program will have difficulty reaching its goals. While the campaign goal has not been set, the following table exhibits the size and number of gifts needed for success with a \$15,000,000 capital campaign.

Table of Needed Gifts
\$15,000,000 Capital Campaign**

# Gifts	Gift Size	Amount	Cumulative Total
1	\$3.0 M	\$3,000,000	\$ 3,000,000
2	\$2.0 M	\$4,000,000	\$ 7,000,000
3	\$1.0 M	\$3,000,000	\$10,000,000
4--6	\$500,000	\$3,000,000	\$13,000,000
10 or more	\$100,000	\$2,000,000	\$15,000,000

** As part of the capital development initiative, all alumni will be asked to significantly add to their annual gift in order to produce a major increase in the annual fund for excellence

Next Steps

After the prospect identification and qualification initiative is complete, the capital development task force will begin the process of engaging and cultivating prospective pace-setting donors. We will have a series of individual and small group meetings with prospective donors, to share our strategic agenda and discuss the impact a successful campaign will have on Our Camp's growth and development and its capacity to build an even more dynamic future. We will follow cultivation activities with one-to-one conversations to talk about gifts to the campaign. Our goal is to complete the pacesetting gifts phase by the end of NNNN. Obviously, with gifts of the size and impact we are talking about, the follow-up to this initial work may well extend for some time.



Capital Development: Frequently Asked Questions

How do I KNOW what's possible for my camp to raise?

There is no certain predictor of fundraising success. We have to rely on our camp's mission and impact as the motivating sparks and then work the fundraising process with diligence, energy and creativity. However, there are a couple of approaches that can help you have the confidence you need to move forward.

Analyze Your Data

If you have used Wealth Engine or a similar process to evaluate your data base, add up the potential of all donors rated as having the capacity to give gifts of \$25,000 or more. Then ask, "If these estimates are wrong by 50%, do I still have the potential to meet my goal?" We know that the numbers in this research are reasonable reliable, so, if we assume an error factor of 50% and we are still in the ball park, we can get to work.

Do the Numbers

If you don't have Wealth Engine type data, look at your known prospect base and ask, "Do I have enough prospective donors at each level to feel confident about getting the number of gifts at the level we need for success?" That is, if you are a mature program, do you have 2-3 donors with the capacity to give at each level? If you need three gifts of \$1.0 M or more, do you have five or six prospective donors at this level? If you are in a new or emerging capital development program and need three gifts of \$1.0 M or more, do you have 10-12 prospective donors at this level?

Assess Perceived Readiness

List your prospective major donors and, beside each one, the gift potential. Then rate how ready you think that prospective donor is to make a gift of that size. Use a scale for your ratings – .1 if they are highly unlikely to ever make such a gift up to 1.0 if you are certain they are ready to make a gift of this size. Add up your total gift value if you were to bat 1.000 and multiply that number by the average readiness rating.

What about a feasibility study?

The goal of a feasibility study is to help you understand the attitudes and opinions that will help you conduct a successful capital gifts program. Within that context, a feasibility study can help you develop a conservative sense of what you might raise. More effectively, a feasibility can be a key strategy in helping you develop the readiness of your primary capital gift prospects. A feasibility study will only be as effective as the quality of the list of prospective donors and leaders that you develop.

What should I expect from a fundraising consultant?

Feasibility

- Thoughtful planning tailored to the needs and history of the Cohen Camps
- Careful, collaborative selection of the interview pool
- Top of the mark interviews and reports
- Insightful data to assist in developing cultivation and solicitation plans
- Expansion of the qualified prospect pool and identification of prospective campaign leaders

- Effective relationships maps to guide next steps
- Timeliness
- A sound, non-cookie cutter report

Fundraising

- Thoughtful planning tailored to the needs and history of the organization
- Disciplined time tables for prospect development and campaign implementation
- Effective management of the cultivation and solicitation schedule
- Insightful guidance for campaign material and proposal preparation
- Top of the mark coaching for the chief executive, development director and campaign volunteers
- Assistance with board development as an outgrowth of campaign activity
- A no-nonsense, non-cookie cutter approach
- Timeliness

Evaluating Capital Development Potential

Analyze Your Data

Donor Search and Wealth Engine are tools for narrowing the field of search in the prospect identification process. If we assume that the camp in question needs to raise \$12.0 M, we start by taking the assessment vehicles findings at their face value. Then ask the question, “What if the rating is wrong by 50%?” The table indicates that the camp has 304 potential donors rated as having the financial capacity to make gifts of \$10,000 or more. If, worst case, both numbers are wrong by 50%, we have 150 prospective donors with the capacity to give \$5,000 or more, some, much more.

A set of numbers for illustrative purposes could look like this:

Gift Capacity	# Prospects	Potential Value	Cumulative Value	50% Model
\$1,000,000	3	\$ 3,000,000	\$ 3,000,000	\$ 1,500,000
\$ 500,000	3	\$ 1,500,000	\$ 4,500,000	\$ 2,250,000
\$ 300,000	12	\$ 3,600,000	\$ 8,100,000	\$ 4,050,000
\$ 200,000	30	\$ 6,000,000	\$14,100,000	\$ 7,050,000
\$ 100,000	146	\$14,600,000	\$28,700,000	\$10,850,000
\$ 75,000	55	\$ 4,125,000	\$32,825,000	\$ 2,062,500
\$ 50,000	49	\$ 2,450,000	\$35,275,000	\$ 1,275,000
\$ 40,000	5	\$ 200,000	\$35,475,000	\$ 100,000
\$ 30,000	1	\$ 30,000	\$35,505,000	\$ 15,000
				\$17,752,000

Takeaway: It is reasonable to assume that a goal of \$12.0 M is achievable. It is time to assertively begin the process of cultivation and solicitation.

Assess Perceived Readiness

Effective prospect identification and qualification involves two critical components:

- **Capacity:** successful capital campaigns require high net worth individuals with the financial capacity to make gifts at the level needed to meet financial goals.

- **Readiness:** successful capital campaigns also require high net worth individuals who are engaged with the organization and hold it in high enough regard to make investments at the levels needed to meet financial goals.

Readiness can be assessed on a % continuum: from 10% (highly unlikely to ever give at a significant level) to 100% (has personally indicated the readiness to make a significant gift). If we assume that 10% of the illustrative table’s qualified prospective principal gift donors have a readiness level starting at 10%, a “worst case” analysis of the prospect pool would look like the following:

<u>20% of Potential Value</u>	<u>Readiness Level</u>	<u>Qualified Value</u>
\$7,100,000	50%	\$ 3,550,000
\$7,100,000	40%	\$ 2,840,000
\$7,100,000	30%	\$ 2,400,000
\$7,100,000	20%	\$ 1,600,000
<u>\$7,100,000</u>	<u>10%</u>	<u>\$ 710,000</u>
		\$11,500,000

Takeaway: It is reasonable to assume that a goal of \$12.0 M is achievable. It is time to assertively begin the process of cultivation and solicitation.

