Required Reading for Running a Capital Campaign
Preparing for a Campaign

By TED GROSSNICKLE, CFRE
Senior Consultant and Founder

Thoughtful planning for a campaign is more important than it has ever been. The pressure to meet increasingly high expectations is real, establishing ambitious but realistic goals is more critical than ever, and yet resources to do so are seriously constrained or questioned.

If you believe a campaign is in your future, think about how well your organization can answer these key questions:

1. Do you have a strategic plan and have philanthropic priorities been identified?
2. Can you articulate your vision and plans in a donor-centered case for support that outlines key campaign components and corresponding funding levels? Can you describe how things will be different if the funds are raised?
3. Is there consensus and commitment by your board and key institutional stakeholders for these campaign components?
4. Is the board ready to support a campaign and does it understand its role?
5. Have you assessed your internal readiness for the rigors of a campaign and do you have a road map based upon sound strategy for campaign success?

To help your organization set realistic goals, develop the plans to meet them, and engage volunteers and colleagues in achieving them, consider these key steps in preparation for a campaign:

• **Strategic planning** ensures that your organization has a long-term vision and outlines the steps to take to achieve it. Effective strategic planning should also include a process to engage everyone on your leadership team, your board, and a broad array of constituents. This unified approach allows everyone to move forward together for the future of the institution, working toward the same vision.

• **Board preparation and education** allows your board members to actively think through the realities of a campaign and clarifies their intent to actively “own” and support it.

• **An advancement audit** provides an objective overview of current strengths and areas for improvement in the advancement program. Advancement audits should have both qualitative and quantitative components, including confidential, structured interviews with staff and volunteers as well as a quantitative analysis of previous fundraising data and benchmarking against peer institutions. An audit will identify key opportunity areas and critical issues likely to help or hinder your fundraising efforts. It also offers an action plan for strengthening your advancement program and provides a solid base for campaign success.

• **Case statement development** provides an opportunity to share and test major campaign themes in a persuasive, concise, easy-to-read document. It helps you to state your organization’s case for support in an emotionally compelling and factually convincing manner that demonstrates the campaign and the organization to be a sound philanthropic investment. A preliminary case for support will be used to test your organization’s aspirations during a feasibility study and it helps you have early conversations with key lead donors.

• **A feasibility study** tests your organizational vision, its highest aspirations, and its campaign goals with top prospective donors and identifies key motivations for philanthropic investment. It gives you not only a recommended campaign goal, but just as importantly, a campaign structure, timetable, and action plan for moving forward with a campaign.
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How a Nonprofit Motivated Staff to Give to a Capital Campaign

By TIMOTHY SANDOVAL

Many fundraisers say getting impressive gifts early in a campaign can spur further donations and build momentum. And who better to tap at the outset than those closest to your organization?

That’s how fundraisers at the Children’s Hospital of Philadelphia Foundation started the quiet phase of their $100 million drive for a new outpatient care facility, raising more than $20 million from hospital executives, board members, and some key donors before soliciting other employees and the broader public. As they moved from one group of contributors to the next — from executives to board members, for example — they touted gifts from the previous donors as a sign the campaign was going strong.

The tactic helped secure the campaign’s signature donation: a $50 million naming gift from the family of Alan and Constance Buerger, who founded Philadelphia-area life-settlement company Coventry First, which buys seniors’ life insurance policies.

“I was able to demonstrate to that family that the campaign was really moving forward,” said fund-...
that we’ve got significant momentum,” said Stuart Sullivan, chief development officer for the hospital, which is a roughly $1.8 billion giant with thousands of employees who provide patient services and conduct research.

Children’s Hospital launched the public phase of the drive a few months after the Buerger pledge was announced in mid-2013 and is 96 percent of the way to its goal for the 700,000-square-foot building, now called the Buerger Center for Advanced Pediatric Care. Five floors of the 12-story facility are already open.

The campaign holds lessons for other nonprofits on the importance of getting a fundraising drive off to a quick start and the value of soliciting people with a strong connection to your institution, like staff and board members.

Sullivan and Ingrid Heim, a consultant brought on to help manage the campaign, spoke about it in interviews with *The Chronicle* and at the 2016 Association of Fundraising Professionals conference.

**Starting With Executives**

Many development teams go to board members first to contribute to a capital campaign, but Sullivan took a different approach, first soliciting 25 of the institution’s executives. He thought the leaders’ gifts could act as a catalyst for trustees, who often have deeper pockets.

Sullivan was direct with executives, visiting each of their offices to solicit donations.

“I said, ‘The expectation is that you will make a gift to this campaign,’” Sullivan said. “I kind of bare-knuckled a bit.”

All of the executives were willing to give, he said, and some made five-figure gift pledges. In total, they gave a little more than $1 million.

“That really made a statement,” Sullivan said. “That enabled me to then go to the trustees and say, ‘Look, we’ve already cobbled together a million or so dollars just from the executive leadership. Now we need you to step up.’”

**Board Gives Big**

Sullivan approached all of the hospital’s roughly 30 trustees personally. Some made seven-figure pledges, including the chairman, who encouraged the development chief to tell other trustees about his contribution.

The hospital also solicited some of its larger donors, focusing on those who might personally benefit from the project — like people who had children — or who had a strong connection to the hospital in another way.

In total, executives, board members, and donors gave roughly $20 million during the silent phase, with trustees pledging the most.

“Getting the board and executive-level buy-in was really critical for us to frame this as a No. 1 institutional priority,” said Heim, the consultant who advised on the campaign.

**An Employee Cabinet**

While fundraisers were soliciting gifts from the leadership and board, the hospital was also working on a drive targeting employees, including doctors, nurses, administrators, and information-technology staff. At the time, the work-force giving rate was only about 3 percent annually, and the average employee gift was around $275. The development staff was determined to get higher participation for the capital campaign.

One of the first steps was starting an “employee campaign cabinet” of roughly
30 people who volunteered to help promote the campaign to their colleagues. To get the group started, development staff recruited employees they already had relationships with, then asked department heads to identify people they thought might want to participate. Heim said she wanted volunteers to be the public face of the employee drive, with fundraisers and administrators taking a back seat.

“It really was about getting that buy-in and having those folks really be our ambassadors for this campaign from the outset, so it wasn’t just people like me and Stuart,” Heim said.

Sullivan said department heads and managers had tried to solicit gifts from staff in previous campaigns. “We wanted to approach it from exactly the opposite perspective and for this to be very much a volunteer-driven campaign,” he said.

The cabinet developed a slogan for the campaign — “Let’s Raise the Roof” — and approved T-shirts and other marketing materials. Cabinet members also led presentations about the campaign at staff meetings.

**Holding Launch Event**

The hospital held an all-day launch event to signal the start of the employee campaign in April 2013, most of it in the atrium of the main hospital building and the cafeteria. The cabinet members and other volunteers took questions about the building project and staffed information tables. Others provided entertainment. A Beatles cover band made up entirely of doctors played a set in the cafeteria, while laboratory technicians held a “fashion show” in which they modeled outfits made from materials in their lab.

The week of the event, development staff sent mailings to employees promoting the campaign.

**Ease of Giving, Incentives**

To make giving easy, employees could have both big and small contributions deducted from their paychecks. Fundraisers tried to emphasize how even large gifts could be made manageable through deductions over time. “We really broke down the math,” said Heim.

The hospital also offered incentives. For instance, employees’ names were placed permanently on an “employee giving wall” when they made a gift of any size, Heim said. Those on staff who made larger gifts could get their names on rooms and other parts of the building.

**Raising the Bar**

Seven percent of employees gave to the campaign, raising $1.4 million from employees in 2013, more than double the average annual staff giving rate. The in-house tactics gave the campaign an additional jolt before the launch of the public phase, Heim said. Another benefit: The campaign got employees in the habit of giving to the hospital and helped fundraisers learn strategies to solicit staff that they will continue to use.

“We raised the bar,” Heim said. “People thought about giving $1,000 to their work for the first time ever.”
How Mayo Clinic Raised Nearly $3.8 Billion

By HEATHER JOSLYN

MAYO CLINIC got into the campaign business late, but it’s made up for lost time.

In February, the charity announced it had raised $3.76 billion during a drive whose quiet phase began in January 2010. The campaign, “You Are ... The Campaign for Mayo Clinic,” exceeded its $3 billion goal one year early.

Support came from 530,000 donors representing 99 countries and all 50 states. It fueled the opening of a medical-school campus in Scottsdale, Ariz., the expansion of one in Jacksonville, Fla., research into medical techniques that replace or help regrow damaged cells and organs, research into health-care delivery, and more.

Making the accomplishment more impressive: It was only the second sustained philanthropy campaign launched by Mayo Clinic, which was founded in 1914. And the campaign came hard on the heels of the organization’s inaugural effort, launched in 2005. That drive, designed to support operating costs, aimed to raise $1.25 billion in seven years; it raised $1.35 billion in five.

Changes loom at Mayo Clinic: Its president, Dr. John Noseworthy, who helped stabilize the organization’s finances during his seven-year tenure, has announced plans to retire at the end of 2018.

On the occasion of wrap-up of the latest campaign, Cheryl Hadaway, who became chair of the organization’s department of development in 2011 after years in other jobs at the organization, talked to The Chronicle about the secrets of the drive’s success.

Cheryl Hadaway says the Mayo Clinic has hired new fundraisers at a steady pace and continues to do so.
First of all, congratulations on the campaign. When did you know that things were going to go as well as they did? Was there a turning point?

When we made our announcement in May 2014, we felt we were experiencing very good success with the campaign, and we were certainly seeing opportunities and that the campaign was going to accelerate toward the end of the campaign. And that, in fact, happened.

Was there any concern internally that back-to-back campaigns might result in donor fatigue? What prompted the decision to do them back to back?

An important point is that the prior campaign was the first campaign Mayo Clinic had ever had. For our benefactors, that was really new for them; it was new for the institution. As we were really seeing continued acceleration and decided to continue with that. We did consider whether there would be benefactor fatigue, but there was not.

A key point is that the funding priorities for that second campaign were launching initiatives at Mayo Clinic that would have a direct impact on patient care. And our benefactors, 85 percent of them are grateful patients. So the launching of a campaign, or continuation into a second, was inspired by the work we had accomplished and the impact on the patients of Mayo Clinic, and beyond Mayo.

You have more than half a million benefactors. Can you talk about how you went about trying to attract support that broadly?

We engage primarily with our patients. I would say our response is very similar to peer institutions. It follows that 80-20 rule (in which 80 percent of a campaign’s money comes from 20 percent of supporters). But we had great response, really, all across the continuum, with gifts of all sizes. Our patients are tremendously inspired by the care they received, and they wish to give back.

The middle of the pyramid — meaning gifts from about $100,000 to about $5 million — we were able to double the response from benefactors at that level. We doubled the number of gifts compared with the previous campaign.

You had just had a campaign in 2010. Did you add more fundraisers for the second campaign?

We started a strategy in the first campaign and continued in the second to just gradually build our team over time.

Did you have a lot of turnover after the first campaign? Sometimes people leave when one finishes.

No.

Were there any challenges with hiring for such a big campaign?

One of our strategies is the steady pace of hiring. We don’t really have a start-and-stop. We’re kind of in a constant mode of doing that activity. That’s designed intentionally. If an individual expresses interest in joining our team, we always have the opportunity to consider them. And we’re always out there looking for highly qualified individuals. That strategy has worked very well for us.

The campaign saw some very big gifts: Richard Jacobson, $100 million in 2011. Robert and Patricia Kern gave more than $67 million in 2014. Any good stories behind those gifts that you’d like to share?

Kern has a remarkable grateful-patient history with Mayo Clinic, from when he
was a child. He continued his relationship with Mayo Clinic throughout his life, along with Kern. Kern passed on last year, sadly. But they have been exceedingly engaged grateful patients of Mayo Clinic and really saw the outcome of their generosity in terms of impact on patient care. And they have global impact on health care. They inspired us to name a Center for the Science of Health Care Delivery after them.

Kern’s an engineer, and he really understands intuitively the value of applying engineering and design concepts to health care to create a more efficient, high-quality, value-based delivery of health care. With that investment by the Kerns, Mayo Clinic was able to launch that new center that today, in less than a decade, has become a national resource for that kind of activity in health care.

**Did the organization do anything new in terms of stewardship during this campaign?**

Well, we have very rich history of stewardship. That’s probably the most critical part of our fundraising cycle. We probably didn’t do anything novel, but what we did was keep an aggressive pace of keeping our benefactors informed of how their gifts were being utilized and engaging them in that activity.

Meaning, for example, with the Kern Center, on an annual basis, Kern met with members of the center and was kept informed on what was happening.

We also seek their guidance and their advice. We try to keep our benefactors an active part of the gift activity.

**What’s next? Is there another campaign on the horizon? Are you going to focus on retaining the folks that you’ve been able to hire during this campaign?**

In terms of our staffing, we will continue to grow our staff. In terms of the campaign, no determination has really been made about that.

Dr. Noseworthy has been very clear in his communications about Mayo Clinic; it is in a very stable financial position. We’re focused on continuing the work underway, but we’re also going to be focused on some pretty aggressive capital initiatives that will require pretty significant philanthropic support.

The campaign may have ended, but there’s still a lot for us to do. We will continue just like we’re in campaign mode.

*The interview has been edited for brevity and clarity.*
$500-Million Campaign Reveals New Fundraising Might for National Park Foundation

By HEATHER JOSLYN

Tourists gather at the North Window Arch at sunset in the Arches National Park near Moab, Utah, one of more than 400 sites that stand to benefit from the National Park Foundation’s successful fundraising drive.
Will Shafroth leans across a conference table, mimicking an exhausted marathon runner straining to break the finish-line tape. He’s trying to convey how hard the fundraisers at the organization he leads, the National Park Foundation, had to work to keep up the pace of its first-ever capital campaign.

Donors were so responsive that the 50-year-old nonprofit’s board kept moving the goalposts, from $250 million to, eventually, double that.

“Hey guys, come on! Give us a break!” Shafroth exclaims, acting out his team’s frustration with the ever-moving target.

The fundraisers must have gotten a second wind. On Tuesday, the foundation, which previously had never raised more than $25 million in a year, announced it has exceeded the goal, with more than $515 million collected so far. The five-year campaign, tied to the centennial of the national-park system, will wrap up at year’s end.

At a board meeting at the Grand Canyon last October, Shafroth says, the foundation began looking past the current campaign, pondering a big question: “What do we need to do as an organization, to prepare for the next big thing?”

**Corporate Support**

The $500-million goal was hit in March, Shafroth says, thanks in part to some very pleasant surprises: a handful of megagifts, and the growth of corporate revenue.

“The performance of our corporate fundraising turned out to be a lot more than we thought,” says Shafroth, who joined the foundation as president in 2015. Partners like American Express, the Hallmark Channel, the health-insurance giant Humana, the food manufacturer Nature Valley, the outdoor retailer REI, and the railroad company Union Pacific stepped up with support.

Donations by corporate partners have brought in about $90 million, nearly 18 percent of the campaign’s total. Before 2013, the foundation brought in no more than $5 million in corporate support annually, says Scott Anderson, its senior director for communications.

“Normally, corporate giving for an organization like ours would be 8 percent — and that would be on the high end,” Shafroth says.

He adds, “We’re starting to see corporations come to us. People recognize the value of the brand of the national parks.” All the more remarkable, because the foundation holds corporate partners to strict gift-agreement guidelines when it comes to public recognition. As Shafroth puts it, “Nobody’s getting a big banner.”

Instead, corporations touted their support through a variety of media campaigns.

Nature Valley produced a commercial for its granola bars that featured hikers saying what spending time outdoors gives them. Humana’s messages focus on senior health care and the importance of exercising; the company has also created virtual-reality videos that show people exploring specific parks. Union Pacific created a video for the campaign that emphasizes the role the railroad played in building and enhancing national parks.

The process of working with corporate donors has been “iterative,” Shafroth says. “Our team will spend a day or two with them, understanding their values and their priorities as a company. And then we brainstorm with them.”
Individuals and family foundations have given two of every three dollars the campaign has raised, for a total of $330 million. The drive has raked in millions from major donors, including $18.5 million from the financier David Rubenstein; $30 million from Burt’s Bees co-founder Roxanne Quimby ($20 million for an endowment and $10 million in inholdings, or privately owned parcels within parks and other public land); and a total of $95.7 million from two anonymous donors.

Rubenstein, who specializes in “patriotic philanthropy,” earmarked his 2016 gift for restoration and enhancements at the Lincoln Memorial. In addition to her cash gift, Quimby donated 87,000 acres in Maine’s North Woods, land valued at roughly $70 million, for the creation of a new national monument, a transformational gift Shafroth calls “Rockefeller-esque.” To raise a half-billion dollars, the National Park Foundation invested heavily in direct marketing. It paid off: Direct-response donors grew by an average of 23 percent each year since 2013, Anderson says. The nonprofit expanded its major- and principal-gifts staff from four to six fundraisers, to aid with stewardship. “We want to be a first-in-class stewardship organization,” Shafroth says.

The foundation-relations staff grew from one to three employees. Foundations have provided $80 million, more than 15 percent of the campaign’s take to date.

Shafroth credits the foundation’s board with setting the bar high with its ambitious goal, and with making the investments necessary to be successful. Al Baldwin, a Southern California homebuilder and board member since 2008, chaired the capital campaign from its launch. “We just had to put ourselves in front of more and more people,” Shafroth says. “And the board helped immensely. When you have a really good product to sell, people respond.”

In addition to the board’s bold vision, Shafroth credits a tighter relationship with the National Park Service with helping to push the campaign toward its goal. The foundation was chartered by Congress in 1967 to support the parks, but the nonprofit and the Park Service haven’t been as closely aligned during most of the foundation’s history as they are now, he says. “We have buy-in throughout the Park Service for what we want to do, with them and for them,” he says. “That seems obvious, but we’re an independent 501(c)3. It’s not a foregone conclusion.” That relationship, he adds, “will pay big-time dividends going forward.”

Park Service personnel helped to develop the language and specific priorities for the foundation’s new strategic plan, Shafroth says. The board approved the plan in March. “We’ve learned that there’s a very high need to help the parks address the restoration aspect of their mission,” he says. Going forward, there will be “less focus on creating new parks, more focus on restoring what we have and making them better.”

Attendance at the parks will be a key measure of success, he adds, a refinement of the campaign’s “protect, connect, and inspire” mission statement. “It’s hard to quantify inspiration, but we can quantify engagement,” Shafroth
adds. “How many people got to the park? How many people signed up for a science discovery program? How many fourth graders went to a park?”

**Future Plans**

With the campaign winding down, the foundation and its board are planning to make the most of the organization’s newfound fundraising might.

A feasibility study is a likely next step, Shafroth says: “What would the market bear? Depending on what we did, would there be a demand for it?”

He and the board see some obvious areas for greater focus — more intensive stewardship and recruitment of donors who give $1,000 and up, for example, as well as foundation, corporate, and planned giving. “Each of those is coordinated and connected,” Shafroth says. “If you’re running a corporation, you might also have a private foundation. You might also make an individual gift.”

Overall, the charity leader sees a lot of promise for future philanthropy — if he and his team can capture it.

“There’s much more opportunity to take advantage of than we’re able to,” Shafroth says. “That’s what keeps me up at night: How many more foundations, or wealthy families, or merchants can we get in front of, to tell our story?”
How USC Raised $6 Billion and Is Now Seeking More

By HEATHER JOSLYN

One key to the University of Southern California’s success was to focus on raising money from the institution’s staff and from people who aren’t superwealthy.
When the University of Southern California announced its current capital campaign back in 2011, the fundraising world gasped. The private research institution’s goal of $6 billion was unprecedented and audacious. Furthermore, the Campaign for USC broke the rules of big drives: It went public after a short quiet phase, with less than 20 percent of its goal raised, about half as much as in most campaigns.

The risks, however, are paying off. It’s on track to raise $6 billion 18 months ahead of schedule, says Albert Checcio, USC’s senior vice president for university advancement. More than 322,000 donors have contributed, and only a third are alumni.

Last month the university announced that it was extending the campaign, originally slated to end next year, until the close of 2021.

The university won’t set a new goal for the campaign, which is supporting financial aid, faculty recruitment and compensation, research, and facilities, Checcio says. (He dismisses the eye-popping $9-billion figure that’s been bandied about in the news.) But in an interview with The Chronicle, he was happy to share some of the secrets of USC’s fundraising success. This interview has been edited for brevity and clarity.

When did you conclude there would be more opportunity if you extended the campaign?

About a year and a half ago. President [Max] Nikias and I sat down, doing projections over the next several years. According to the data, a couple things were obvious: that the campaign still had momentum and that we were still attracting new donors all the time. And we still had needs we wanted to address. We decided to watch it over the next year to see if that held up.

Where were those new donors coming from?

The new gifts are coming from friends, parents, grateful patients. Some of the biggest gifts we’ve received in the past two or three years have come from nonalumni.

Are you spotting any trends among the donors?

They’re a little younger than the traditional major-gifts prospects. We’re receiving gifts from more women than ever before.

When nonalumni make gifts, it’s not because they’re committed to dear old USC. They’re committed to something USC is doing that is important to them and is going to have an impact well beyond USC — whether it’s addressing a societal issue or a disease. Our reputation is spreading as an institution that gets things done, that does what it says they’re going to do. Now that sounds simple, but you’d be surprised the number of people who have accepted gifts and not delivered on the promise that they’ve made to the donor.

Capital campaigns often rely heavily on a small subset of wealthy donors. Has that been the case for USC?

A lot of times in a campaign of this size not enough attention is paid to what we call the middle of the pyramid. But that’s where we put our resources.

We do two things, and I think they’re both a little bit different. First, USC has always had a history of big gifts at the top. But those gifts are driven by trustees and the president and relationships that
have been built. Where we see our biggest opportunity is in the middle, in staff-driven gifts. Someplace like USC, with its 370,000-plus alumni, with a medical enterprise, with prime-time athletics, we have prospects galore in that area.

We’ve paid attention to everything and so we’ve had growth at every level of the pyramid. Now, yes, the big gifts get all the attention. Thirty gifts of $25 million or more; that’s stunning. Five gifts of $100 million or more. But we also have 280,000 gifts of $1,000 or less. Which to me, is just fantastic. We pulled our alumni participation rate up from 34 percent before the campaign to 42 percent last year.

All gifts matter. All gifts are important. A lot of the big gifts we’ve received from our alumni are from people who gave to the annual fund 20 years ago.

The other thing we do: USC really builds relationships as good as anyone I’ve ever seen. And we see so many repeat gifts, for different aspects of the university. Because when the gift is made, the work really is just beginning.

What are some of the things you do to make donors feel appreciated?

We’re a very open and welcoming place. I know it sounds cliché-ish, but once your son or daughter enrolls at USC, you’re part of the Trojan family. We take it very seriously.

So we have a lot of events. And the president hosts a lot of dinners and receptions. We invite parents to the president’s home for special parents’ nights. We do more than a lot of institutions in making the leader available. The deans at USC are very involved in external relations. We celebrate gifts, and we invite people to activities on campus. And they bring their friends.

It starts at the top. Our president and first lady, they probably entertain 3,500 to 4,000 people at their residence every year: students, faculty, alumni, donors. I mean, not many people open their home up like that.

What are some of the other strategies and tactics that have made the campaign successful?

We have greatly increased the advancement staff. Six and a half years ago, there were about 230 in university advancement and alumni affairs. We have about 470 now. This is a labor-intensive business.

We take the long-term approach to fundraising. We didn’t just want to launch a campaign, we wanted to build a fundraising staff. And because we’re properly staffed, we can keep the campaign going.

I’ve seen so many universities make the mistake of ramping up for a campaign, and when they come near the end of it, they sort of de-emphasize advancement. Advancement is not as much of a priority and therefore resources are not as readily available. This may cause high-producing staff to look elsewhere for career satisfaction. And then talented people leave. And you’ve invested five, six, seven years in this staff, and you lose them just when they’re most effective for your institution.

We weren’t going to let that happen here. We created the USC Fundraising Institute, internally, where we do training. If, say, someone’s in planned giving but is interested in learning about corporate and foundation relations, we train within our own teams. So people can have career paths within USC.

You’ve heard people say, “In order to move up, you have to move out.” Well, why is that? Why can’t we create up-
ward mobility in an institution as large as ours?
If someone leaves because they want to run their own program, great. But I don’t want anyone to leave because they can get $20,000 more somewhere else.

Will you need more staff for the campaign’s last push?
One of the main priorities is our medical enterprise. If there’s going to be any growth, it could certainly be there.
There are more than 40 capital drives ongoing at colleges and universities with goals of $1 billion or more, according to the Council for the Advancement and Support of Education. With all these big campaigns, are you hearing any concern among fundraisers about donor fatigue?
I haven’t heard anything. Have you noticed how many big gifts are being announced these days? It’s amazing. A rising tide lifts all boats. People see a big gift made to Chapman University, and they think, I could make a gift like that to University of California at San Diego.
I can only speak for myself and what I see on the West Coast. I don’t think there’s fatigue at all.
A Community Foundation’s Anniversary Campaign Raised More Than $100 Million: Here’s How

By ALEX DANIELS

The Miami Foundation’s Creativity event featured Miami singer and “America’s Got Talent” star Yoli Mayor.
The Miami Foundation set some big goals for its 50th anniversary, which it celebrated in 2017: raise more than $100 million and create a million-dollar-plus endowment. It was an ambitious set of targets. A decade earlier, the community fund held only about $130 million in assets. And many of its donors were cool to the idea of an endowed general fund, preferring to steer their gifts to specific projects throughout the city.

Yet the foundation cleared the mark easily. Even when subtracting the donations that came in a surge after Hurricanes Irma and Maria slammed the Caribbean and parts of Florida, the foundation’s Golden Anniversary effort surpassed its goals when it raised $116 million and received $1.5 million in gifts for an endowment.

A big reason the grant maker succeeded, according to Rebecca Mandelman, the foundation’s vice president for strategy and engagement, was that the planning started more than a year in advance. “The stakes were very high,” she says. “We knew we only had this opportunity once.”

Here are some tips that Mandelman offers based on the foundation’s winning strategy:

**Develop a clear theme.**

The grant maker began in 2016 by checking in with other big-city community foundations to see how they celebrated their anniversaries.

In a series of interviews with other large community grant makers, Mandelman discovered that other regional foundations didn’t always have a clear focus for their anniversary celebrations. Miami decided it would focus on growth. As it planned for the anniversary year, every conversation centered on how the celebration could help the foundation increase its assets.

“It might seem obvious that’s the goal, but from our research, it wasn’t a given,” she says. “We saw other community foundations use their anniversaries as a way to rejigger their focus or to rebrand.”

Understand your donors’ motivations for giving.

With such a big goal, it quickly became clear that the foundation needed to forge a deeper connection with its donors and attract first-time givers. To do that, foundation leaders realized they had to better understand why donors give. The foundation held in-depth interviews with 25 supporters with a range of incomes, ages, and backgrounds to gain insights into what motivated them. The foundation used the feedback to develop a survey it then sent to all of its donors.

It learned that they were primed to give when they felt their donation would contribute to Miami’s legacy as a great city, ensure its residents have ample opportunities to succeed, develop the region’s resilience in the face of challenges like climate change and sea-level rise, or promote the creative life of the city.

Don’t put all your eggs in one basket: Hold several events that inspire gifts.

Rather than throwing one huge bash to celebrate the milestone, the Miami Foundation designed four events tailored to the interests of different donors. All donors were invited to attend each event. But it promoted events more heavily for people who had indicated an interest in a particular subject and prospective donors...
who had given to another nonprofit with a related mission.

Doing so allowed the foundation to spread the fundraising effort over the course of the year. Multiple events also helped maintain momentum, Mandelman says. The string of get-togethers allowed Mandelman and her staff “to connect and engage with donors and prospects in a way that got them excited to give during the year but also deepened the relationship for years to come,” she says.

**Emphasize your group’s longevity.**

Throughout the year, the foundation tried to drive home a simple message: It is poised to grow in the future. But it couldn’t ignore its past on such an important anniversary.

To kick things off, the Miami Foundation held a celebratory gala in January. The grant maker shared stories from its past to stress the importance of creating an endowment, the Miami Forever Fund, which it introduced that night — and to celebrate the role nonprofits played in the city’s growth.

At the celebration, which was held at the Alfred I. duPont building, a glamorous Art Deco structure that harkens back to Miami’s early days, the foundation announced new grants to each of its original eight recipients. Each of those nonprofits, Mandelman pointed out, lives on even though the business titans who supported them half a century ago are long gone.

The grant maker wanted to stress its longevity, she says, and emphasize the endowed fund’s ability to take the city well into the future.

Not everyone was buying the importance of an endowment. “We spoke with donors who loved the concept, and we spoke with donors who absolutely didn’t love the concept” because they preferred their donations to have a more immediate, tangible impact, Mandelman says. “The conversations were all over the map.”

Despite donors’ ambivalence, with $1.5 million in an endowment, Mandelman considers the effort a considerable success. Her advice to other foundations looking to do something similar is “to have some champions lined up from the get-go” who can stress to their friends and associates the importance of having an endowment fund that allows a grant maker to be flexible and responsive to future needs.

**Educate and engage.**

The duPont building was carefully chosen as a site to celebrate the city’s heritage. The locations of the follow-up events were picked with similar care to highlight three themes: opportunity, resilience, and creativity.

The opportunity event, which took place several months after the opening gala, was held at the University of Miami. The resilience event took place at the New World Center, a concert hall in Miami Beach, an area that is vulnerable to sea-level rise. And the creativity celebration was held in the Adrienne Arsht Center for the Performing Arts.

When surveyed, donors said they wanted to know more about issues facing the city, so the foundation used the resilience and opportunity events to educate and inspire donors.

The foundation brought in experts from the Ford and Rockefeller foundations and local emergency-response agencies to give detailed talks on how philanthro-
py can support employment, education, transportation planning, and the environment — all aspects of the opportunity and resilience themes the foundation chose. The experts helped explain “resilience,” an effort to make sure regions are well-positioned to sustain emergencies, whether they stem from climate change or poorly designed transportation systems.

“We have donors who say they are interested in this intellectually, but they’ve told us they don’t really get what this is,” she says. “Hearing from thought leaders helped them understand what it means for Miami.”

Engage and shine a spotlight on donors.

At the start of 2017, the foundation set aside $1 million to make “signature” grants in each of its thematic areas. Foundation leaders asked donors and members of the community to nominate nonprofits as potential beneficiaries. At each of the events, the foundation announced a signature grant and highlighted a donor.

The donors included an 11-year-old Caribbean-American entrepreneur and philanthropist, Taylor Moxey; a white Midwestern transplant and retired newspaper publisher, Dave Lawrence Jr.; and a Jamaican immigrant and lawyer, Marlon Hill.

At each event, a video played of these donors sharing their “My Miami Story,” which included biographical details and their reasons for giving.

“We wanted the campaign to engage our existing donors, but it had to serve as a marketing tool for everyone else,” Mandelman says. “We were very intentional about showcasing a wide array of donors. We wanted every Miamian to know they have a place in this.”

Harness the power of local media.

In the days before and after each event, the foundation used the media as an “echo chamber” to reinforce the messages shared in person. Using a $100,000 advertising budget, the foundation bought ads on the Miami National Public Radio affiliate and in Indulge, a Miami Herald publication aimed at high-income households.

The foundation shared its plans for the year with the Herald’s editorial board, and the paper followed up with mentions in editorials, feature stories on the anniversary’s signature grants, and several op-eds.

Be ready for anything.

Prepare for the worst, Mandelman says: “There’s going to be unexpected hurdles that occur during a banner year.”

The Miami Foundation intentionally scheduled its resilience event during hurricane season. In fact, it planned it for the anniversary of Hurricane Andrew to highlight the community support that enabled the city to get back on its feet after that storm slammed ashore in 1992.

However, the event was postponed due to Hurricane Irma so the city’s nonprofits and donors could tend to the needs of people in the state and neighbors in the Caribbean. Changing the date put stress on the foundation’s staff, which had less time after the resilience event to prepare for the closing celebration at the arts center.

When preparing for a yearlong series of get-togethers, Mandelman says, it’s important to budget for extra staff hours because everyone on your team will be working hard.
Conducting a feasibility study prior to a campaign is a common and proven way to gauge what level of support may be achieved in a campaign and what strategies should be employed – not only to achieve a financial goal but, perhaps as importantly, to build both unity and momentum for organizational success.

A feasibility study provides the opportunity for your current and prospective lead donors to dream big, to think through what the future will look like for your organization, and to share how they see themselves participating in that future.

Here are some questions a good feasibility study should help you answer:

1. **How much money can you expect to raise in a campaign?**
   - How much are donors willing to invest to help your organization achieve its goal?

2. **Who are potential volunteer leaders?**
   - Who might be able to partner with staff to make the campaign a success?

3. **What are the perceptions of your organization among your constituents?**
   - How do donors perceive your organization today and how do they envision its future?

4. **Are there underlying issues impacting your organization’s potential for success in a campaign?**
   - What might motivate donors to maximize their giving?
   - Are there challenges that could negatively impact the amount of gifting you are likely to receive?
   - Are there issues impacting your constituency of which you need to be aware?

5. **What are the broader questions that need to be asked specific to your organization?**
   - How can you position this campaign to be successful today and set the stage for long-term growth?
   - Are there opportunities for your organization to seize? Are there synergies that you can create?

A feasibility study will help develop a thorough understanding of how successful your campaign may be and where you may encounter challenges. Feasibility studies that yield the most useful information include:

- A vision for the future that your president and board believe in passionately and is articulated clearly in a preliminary case for support.
- A detailed, custom methodology for the feasibility study that is designed to meet your organization’s needs, not a cookie cutter approach.
- A tailored selection of questions that considers your organization’s history and current situation.
- Face-to-face interviews which yield more insights and build closer relationships to volunteers and donors.
- A process for involvement of key staff, volunteers, and other constituents important to your success.

Organizations that undertake a feasibility study show a willingness to test the strengths of their ideas and vision with those who are being asked to support them. Prospective donors instinctively understand the honesty of this approach and want to share their thoughts. It makes all the difference in campaign success.