

# *The Sheridan Group* – Education Series

## *The End of the Capital Campaign: Leveraging Your Success*

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### **Introduction**

The end of a capital campaign is a transition period that is critically important to future fundraising efforts; yet too often it is a period where staff and volunteers lose sight of the importance of follow through and of laying the groundwork to maintain momentum for future success.

The cause of this problem is quite understandable. Relief at the campaign's conclusion can evolve into a subsequent collapse of effort and loss of focus during which donors are not properly thanked, relationship-building ceases and planning for the future is not addressed. More quickly than you might imagine, your organization and its ongoing needs can become less and less a priority among its supporters.

The fact is that at savvy and well-run non-profits the seeds for the next campaign are being planted and preliminary goals and plans are being discussed and conceptualized during the final phases of the current campaign. Thus, at the campaign's conclusion all elements are in place for the organization to move forward in advancing its mission, to mount a highly successful ongoing advancement program and to involve and engage constituents in planning for the next capital effort.

How should all this work?

### **Having a Long Term Vision**

Institutional needs develop even during a campaign – mission, program, facility, staff and leadership -- so the first requirement of a dynamic institution is a continually evolving strategic plan.

This means that the organization's CEO and administrative team should be working regularly with top program or department heads, the leaders of key constituent groups and the Board's Strategic Planning Committee to receive feedback on prospective new directions for the organization based on current mission priorities and possible new areas for development.

In addition, the organization should continue to seek constituent and stakeholder input and evaluation through the use of surveys, focus groups and interactive website communication. And, not surprisingly, such regular and continual mission, program, leadership and market evaluation will often surface new institutional needs and priorities during the campaign.

By beginning the conceptual development of newly identified priorities and programs and having teams of Board, executive staff, program staff and even outside advisors involved in assessing their desirability, feasibility and financial realities, your organization is not only preparing for the future, it is educating, involving and cultivating future key volunteers and prospects. In essence, the planning process is training future Board members and cultivating future donors even as your current campaign is taking place.

Accordingly, it is not unusual at a capital campaign's end to have the planning for several priority projects or programs already underway with identified financial goals and key volunteers engaged as prospective leaders, thus forming the basis for a next campaign or major gifts effort.

### **The Importance of Saying Thanks**

*Acknowledgements* – We would presume that any successful capital campaign has evolved an acknowledgement system that thanks donors readily and well with systematic attention paid to providing as much personalization as possible and appropriate to campaign donors large and small. It is very important to assure that this system is carried over into the ongoing advancement program upon the conclusion of the capital campaign; it is particularly desirable that the same person continue to manage it.

*Following up on Gift Recognition* – It seems incredible, but we have seen campaigns where follow through with donors who made significant naming gifts ceased at the campaign's end – plaques were not ordered, dedication and thank you events were not planned, donors were not thanked beyond initial perfunctory letters, even pledge payments were not requested. Following your campaign, point responsibility for these critical functions needs to remain with the person already assigned to it or be assigned to another top-notch staffer. In all cases, campaign gift recognition should continue to be monitored monthly.

*The Victory Celebration(s)* – Regardless of the economy or any other financial or leadership/constituency thoughts or concerns, always have a thank you celebration to end your campaign. It does not have to be grand; it does not have to be expensive (In fact, it could well be donated.). It should invite every single constituent, particularly rank and file donors, and even non-donors, to celebrate the campaign's success. This drawing of attention and giving thanks to all those who participated is not only a morale builder for all constituents, it also helps create an environment for a more successful annual fund and future capital campaign. People want to be part of your success.

Should your leadership team or donors wish to have a more exclusive celebration event or events to thank major supporters of the campaign, this is all the more helpful to maintaining good donor relations for the future.

### **An Insiders' Guide To Sustaining Momentum**

*Maintaining A Commitment to Major Gifts Development* – At the end of any campaign, there are a significant number of top prospects remaining who have yet to give. It is most important that your advancement operation not miss a beat or lose focus on their

continuing cultivation and, when ready, solicitation. Accordingly, an Advancement Committee should be formed, reactivated or revitalized following the campaign. This is a perfect assignment for key campaign leaders who are still ‘gung-ho’ as well as new volunteers. This not only assures continuity of your efforts with top prospects but engages and trains a new cadre of volunteer solicitors for your next campaign effort.

*A Renewed Emphasis on Annual Fundraising* – One way to accomplish the above objective is the continued active engagement of top prospects in the Annual Fund. By encouraging them to become signature donors to the Annual Fund, join its giving level organizations or make challenge gifts, your organization can build their commitment and interest while preparing for a next campaign. Given that the capital campaign has raised and expanded constituent interest in your organization, it is also important for the Annual Fund to expand its overall volunteer recruitment for each constituent segment and to broaden phon-a-thon and direct mail programs to new audiences.

*Transitioning to Campaign Preparation and Readiness* – As your current campaign winds down, it is very important for the Advancement Office to prepare a multi-year Transition Plan leading to the organization’s next capital campaign. For instance, if a next campaign is envisioned to focus on endowment, the transition period is a time in which to build a much stronger planned giving program.

The Transition Plan should address all aspects of advancement program internal staffing and program reorganization to meet new and evolving needs. This is vitally important to resisting the tendency of organizations to cut advancement budgets following a campaign, which can be a major cause of organizational dysfunction and let-down.

*Developing a Case for Support and Themes for New Initiatives* – As the Transition Plan proceeds and new initiatives evolve and mature into discrete organizational priorities for the future, developing an initial Case for Support with conceptual materials and renderings is very important to help test and fine tune for the future.

At this juncture, it is often helpful to test such materials with key constituency leaders to get further feedback. As well, the organization should consider using outside fundraising counsel to conduct a “readiness assessment” which recommends the best means, themes, organization and timetable for reaching readiness prior to the Feasibility Study for your next campaign.

*Campaign Leader Transition / Engagement of New Advancement Leaders* – As the market testing of and strategic planning for new directions, programs and areas of for support continues, it is appropriate to expand initial advisory groups into more formal Advisory Committees for each initiative. This offers a further opportunity to find new compelling and engaging roles for campaign volunteers, longstanding Board members and prospective new leaders.

### **The Importance of Board Development**

It is implied, but should be emphasized, that proactive, inclusive Strategic Planning is among the most natural and effective ways to develop future Board members. Those

involved in defining and articulating new initiatives, programs and funding needs inevitably form a qualified and diverse Board member candidate pool.

Effective strategic planning and board development will also serve to prepare a cadre of informed committed leaders for the next capital campaign.

### **Positive Public Relations, Communications and Marketing – Maintaining a Focus on Mission, Message and Building Community**

A comprehensive public relations, communications and marketing plan is as important after a campaign as during.

Quite frankly, your constituents do not have a long attention span. The momentum created by your successful campaign should continue through a series of ongoing articles and events over time that highlight the impact of the campaign's success, that honor significant donors and that highlight the dedications of naming opportunities.

Your organization's Strategic Planning and its prospective initiatives can gradually become the subjects of PR, communications and marketing efforts. In addition, the effort should cover the members and work of Advisory Committees, the results of constituent surveys, the appointment of new leadership to the Board and any other points of organizational development and planning. Such regular communication will maintain visibility and his focus helps spread the word and create a dynamic sense of anticipation about your mission, cause and organization.

### **Conclusion**

The recommended scope of work (and corresponding budget) during the transition period from one campaign to the next is not insignificant. We often find that organizations just do not have the resolve to move forward in as proactive a manner or with the necessary expenditures to maintain momentum after a campaign.

Let us conclude then by noting that every dollar spent during this period leverages increased support many times over during your next capital campaign and that the efforts noted above build strong, positive constituent interest in and momentum for this next effort. The alternative of unfunded, unprepared organizational drift will in the end analysis cost an organization dearly in years to come and require the expenditure of far greater sums of money and far greater work effort to achieve less productive results in a far more challenging environment.