



**Community  
Funds Drive  
Committee**  
*...guiding Erie's capital campaigns*

# Capital Campaign Guidance

November, 2011

# New Rules of the Road for Capital Campaigns

- **The Lead Gift**

- 90-10 is the new 80-20.
- Bigger gifts come from fewer donors.

**BUT....**

- In hard-hit communities, lead gifts may not be as large as they were pre-recession.
- Can you secure multiple smaller lead gifts?



# Other Concessions to Our Times

- More prospects are needed.
- The Feasibility Study tests your organizational brand.
- In this age of empowerment, key donors want to be included.
- You need a compelling, short campaign video that states your case in emotional terms.

# It's all in the planning....



- Organizations that have a greater need are conducting greater due diligence.
- Campaigns today are more prone to stalling. Anticipate and be strategic.
- Build in Plan B that can be made to look like Plan A.

## The Campaign as a Window to the Soul

***“A campaign is not just a set of steps that individuals take. It is really a function of the institution’s concept of where it’s heading, a reflection of the organization’s priorities, needs, and mission.”***

*- Julia Walker*

*Jumpstarting the Stalled Fundraising Campaign (2009)*

# The Case Statement – Making It Compelling and Urgent



- The Case Statement must convey:
  - The uniqueness of the project.
  - The urgency of the issue.
- The Case Statement must answer:
  - Why this?
  - Why now?
  - Why you?

# Elements of the Case Statement

- Concise description of the project.
- Compelling statement of the need.
- Vision: Paint a captivating picture of the new reality you hope to achieve with the campaign.
- Impact: What are the benefits to the community? What are the benefits to the organization?
- Summary statement stressing urgency and fit:  
***This is the right time, we are the right organization, and you are the right partner.***

# History of the Community Fund Drives Committee

- The Community Fund Drives Committee was established in 1975 by the Erie Conference in cooperation with the United Way.
- It was reconstituted in 2005 under the sponsorship of the Erie Community Foundation, the United Way, and the Erie Regional Chamber & Growth Partnership.
- In 2011, sponsorship is being more widely shared among 14 foundation and corporate funders who together will review and approve campaigns.

# Objectives of the Committee

- The objectives of the Community Fund Drives committee are:
  - To act as a “review and recommend” body that sets a calendar of endorsed fund drives
  - To balance the capital needs of our community against the finite resources available
  - To assist nonprofit organizations in preparing a successful campaign

# Composition of the Committee

- When constituted in 2012, the committee will consist of 17 voting members:
  - One from each of the 14 funders
  - Three at-large representatives with nonprofit fundraising campaign expertise.
- The Nonprofit Partnership has been selected to provide coordination support to the Committee and to assist organizations during the business plan development phase

# Scope of the Policy Statement

- The Policy applies to local and regional nonprofit campaigns within Erie County.
- It applies only to campaigns which will solicit funds in excess of \$500,000.
- The Policy Statement excludes:
  - Hospitals, churches, mosques, synagogues, and all pre-primary through twelfth grade schools
- It also excludes Erie County's five institutions of higher education:
  - Edinboro, Gannon, Mercyhurst, PSU/Behrend, and LECOM

# Campaign Protocol

- Only campaigns in excess of \$500,000 will be endorsed by the Committee.
- Only applications with a committed 10% minimum lead gift will be accepted for endorsement.
- Campaign plans will be pre-screened by The Nonprofit Partnership and must substantively meet the endorsement criteria before being presented to the Committee for further review.
- Campaigns must follow the calendar established by the Community Fund Drives Committee.

# Procedure for Endorsement

1. Prepare first draft of the campaign plan, a template for which can be found on The Nonprofit Partnership website and submit to NPP.
2. Meet with your NPP facilitator during the campaign development phase. Expect several reiterations before final plan is completed.
3. Submit final campaign plan three weeks in advance of Committee's semi-annual meetings (March/September).
4. If criteria are met, present your plan to the Committee within a 30-minute timeframe followed by 15 minutes of Q&A.

# Post Presentation Follow-Up

1. Following all presentations, a written evaluation and recommendation will be made by the Committee to each participating organization.
2. Organizations receiving campaign endorsements will be expected to submit a post-campaign report 60 days after campaign expiration.



# Campaign Calendar

- The CFD “public phase” of the calendar will run from January 1 to August 31 (so as not to conflict with the United Way Annual Giving Campaign)
- It is expected that the “quiet phase” of the campaign will be conducted in advance of the presentation/endorsement

# For Campaigns in 2013

- Fall, 2011 Meet for preliminary discussion with NPP
- By January, 2012 Conduct feasibility study
- By February, 2012 Submit first draft of business plan to NPP
- By March, 2012 Present draft plan to CFD committee
- By August, 2012 Submit final business plan to NPP
- By September, 2012 Presentation to full CFD committee
- October, 2012 Announcement of endorsements
- January, 2013 Public phase of Campaign begins

# Questions/Discussion

