



BOY SCOUTS OF AMERICA®
FINANCE IMPACT



HOW-TO-GUIDE

**PLANNING A CAPITAL CAMPAIGN
IN YOUR COUNCIL**

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Introduction - “Fundraising is a process, not an event.” Edgar D. Powell

Nowhere is this truer than in the context of a capital fundraising campaign. A capital campaign is a complicated and delicate process that needs a solid strategic plan as a foundation, a compelling need for support, committed leadership, a hard-working corps of volunteers, and competent campaign direction.

Most capital campaigns are won or lost long before the public kickoff. **More than 70 percent of a successful capital campaign is planning, research, and cultivation.** If the council has not yet created a strategic plan and is considering or conducting a campaign, the process of getting to the public kickoff can take two years. Even with an up-to-date strategic plan, pre-campaign planning, conducting a feasibility study, recruiting campaign leaders, and planning your communications effort can take more than a year.

The campaign itself is the product of a very deliberate process. Though some people see the campaign victory celebration as the end of this process, it isn't. It is only the next step toward transforming the council's vision (and reason for the campaign) into reality.

This manual is designed to assist council presidents, Scout executives, commissioners, and the executive board with many of the important aspects of preparing for and conducting a capital campaign. Suggested time lines are identified for each aspect of the process – but these are only guidelines. Some items can be compressed, and some functions can overlap to ensure the strongest plan. But council leadership is encouraged to invest significant time preparing the campaign's needs, crafting a persuasive case statement for the campaign, and carrying out each of the steps in planning and conducting a successful capital campaign.

STEP ONE: STRATEGIC PLANNING

To answer the question “Do we need to carry out a capital fundraising campaign at this time?”

The executive board and Scout executive should look to the council's strategic plan. An up-to-date and comprehensive plan will help determine if and when the council should take on a capital campaign. The strategic planning process will also identify upcoming opportunities and keep the council from being forced into a capital campaign without good reason or preparation.

Most successful capital campaigns are intended to fund one or more objectives in the council's strategic plan. Done correctly, the strategic planning process will include a representative range of community leadership, build agreement as to the council's needs and timing, establish measurable objectives, and develop a priority for the objectives.

Your plan must include population trends and demographic changes for your council area. This information is available from the United States Census Bureau web site, and your city and county planning offices. It will help in projecting council growth needs – future membership trends, office staff and professional manpower requirements, office and camp needs, and income/expense projections for the council.

PLANNING A GIFT TABLE

Many campaigns are planned with either an 80/20 or 90/10 rule. Basically 80% or 90% of the capital gifts comes from 20% or 10% of the donors. The lead gift is usually approximately 10% of the campaign goal. The top ten gifts may represent approximately one third of the goal, with the next hundred representing another third, and the remaining gifts comprising the final third of the campaign.

The importance of having key volunteers on the strategic planning committee can't be overemphasized. Involving a broad spectrum of quality volunteers in the process will benefit the council in a number of ways. Key decision makers in the community will better understand Scouting and its place in the community more fully. They will help the council stay focused throughout the planning process, they will take ownership of the final effort, and they may end up as strong candidates for the executive board or capital campaign leadership positions.

To Create a Strategic Plan

Time required 7 - 12 months
Annual update to existing plan 2 - 3 months

The BSA publication *Local Council Strategic Planning, No. 30-535*, and the current *National Strategic Plan, No. 45-016*, for the BSA, will help you coordinate your council's strategic plan with current BSA pillars and benchmarks. The Resources section of this guide contains a sample work schedule from the first publication.

STEP TWO: DETERMINING CRITICAL NEEDS

The next step in moving toward a capital campaign is to determine what you plan to accomplish. The executive board and Scout executive must prioritize the proposed program; financial, facility, personnel, and special project needs; and plans identified in the strategic planning process.

This is what will serve as the foundation for your council's campaign. It is the basis for your marketing and public relations messages, the guide for what is to be accomplished, the clear and compelling reason for the project, and what it will cost.

At this stage, the executive board must determine:

- The specific projects to be funded through this capital campaign. You might not include everything from your strategic plan in this list. Some of your strategic needs may not require additional capital or be so long range that they belong in a future capital effort.
- A general scope of the cost of the proposed projects. This should be broken into specific parts to be completed (e.g., new dining hall, building road to camp, training addition to Council service center) that will also help the council "sell" these parts to interested donors.
- Whether or not the proposed campaign will include an endowment component to ensure that the operation and maintenance costs of the new projects and programs will be funded in future years.

The reasons for the project – the **case for support (case statement)**. Simply put, why does the council want this money, what will it do for Scouting and the community, and what would happen if the council didn't raise these funds? How effectively will these funds be used?

This case for support must be written with the donor in mind. Explain the size, scope, and critical need for the project. Identify the emotional reason or tie with the donor for supporting and funding this capital project. And don't assume the donor knows or understands the current issues in Scouting, or for youth in the communities served by the council.

To Determine Critical Needs

Review of the strategic plan	1 month
Discussion, prioritization of needs, cost assessments, and recommendations for capital campaign.....	2-3 months
Building the written case statement	1 month

STEP THREE: CONDUCTING A FEASIBILITY STUDY

The feasibility study provides objective and candid feedback from the general community and key Scouting supporters and benefactors about your local council, perceived need for the campaign you're considering, and their assessment of what you need for a successful capital campaign. Properly conducted, the feasibility study will also help you identify possible leadership for the campaign and additional gift prospects. Conducting some interviews with community leadership not currently active with the council will also help in cultivating or reestablishing relationships with the individuals, businesses, and foundations.

Do We Need to Conduct a Feasibility Study?

The short answer is "yes." It can be extremely beneficial to the council.

In the increasingly competitive world of philanthropy, an organization cannot afford to launch a campaign that is not tested and carefully planned.

Results of a feasibility study will permit council leaders to review public opinion and make any needed adjustments before moving ahead. An unsuccessful campaign – whether it is poorly timed or too high a goal – sends a very bad message about Scouting in the community.

A pre-campaign assessment study will assess your chances for success based upon the strengths of the council and its case for support. It will provide objective, professional insight into how best to build upon these strengths and overcome any weaknesses. The study provides you with a comprehensive plan for moving forward, either with the proposed campaign, or with an alternative plan that more closely matches your needs, resources, and potential. It is a highly specific tool, providing recommendations based upon your needs and goals.

Results of a study can vary widely and, hopefully, most of what the study reveals will be good news for Scouting. But even bad news will help council leaders establish strategies and a plan to achieve their objectives. A study report typically includes detailed recommendations for:

- Setting a realistic and attainable financial goal.
- Modifying or confirming the preliminary campaign objectives (the case).
- Developing the campaign's strategy, organization plan, and committee structure.
- Setting a schedule of key activities and deadlines.
- Recruiting key campaign leaders.
- Securing initial major gifts.
- Preparing communications and promotion materials.
- Soliciting gifts and pledges.
- Budgeting and staffing.

A well-conducted study will also build relationships between the council and those individuals capable of moving the project forward.

Relationship building begins with feasibility study interviews, is nurtured through the execution of the study recommendations, and culminates with a donor's financial support of the project. The information you gain from the study and the value of its recommendations are greatly dependent on the strength of the case statement, and how objectively the study was conducted.

STEP FOUR: COMPLETING THE STATEMENT OF NEED

The council must set the objectives to be met by the campaign. When it has, these objectives will usually be turned into a two- or three-page document that outlines and explains your campaign and how it will help you meet your objectives. It will be shared with all those to be interviewed during your pre-campaign feasibility study, and it will serve as the basis of discussions as others assess the project and its ability to be funded.

This preliminary statement of need (or "case statement") will include:

- General information on the history and purpose of the Boy Scouts.
- Background information about the specific council conducting the study.
- Identification of a compelling need for the proposed campaign.
- Information on the proposed project(s). If it is a camp, include what will be built, remodeled, renovated, or changed. If the campaign is for a council office, what will be included? Campaigns for endowment will include the purpose for which the invested funds will be used.
- Outline of costs for each objective of the proposed campaign.

STEP FIVE: WHO SHOULD CONDUCT THE FEASIBILITY STUDY?

For a study to be meaningful, it must provide an honest and candid evaluation from community leaders and potential donors of the council, council leadership, and the proposed plan. Unfortunately, it's hard for people to be open and candid about flaws and shortcomings if they're talking about – and to – friends and colleagues.

The need for objectivity is why outside counsel may be very useful, at least for the feasibility study. These professionals can help guide you through the process and – since interview comments are reported anonymously – may get much more reliable information out of those they interview.

Hiring counsel is not an inexpensive proposition. Refining your preliminary case statement, conducting 50 or more one-on-one interviews, analyzing the findings, preparing recommendations, and presenting a report can **cost between \$15,000 and \$40,000.**

For example, if you're thinking about a \$15 million campaign, but they tell you that an \$8 million campaign is much more realistic in your community right now, that's money well spent. Plus, you may get some very candid and useful comments you wouldn't have otherwise gotten.

STEP FIVE-A: RETAINING FUNDRAISING COUNSEL FOR THE STUDY

Selecting counsel to conduct a pre-campaign feasibility study is a critical step in your process. The consulting firm you choose will determine the value of the study report you receive. As you consider qualified firms, pick the one with which you feel the most comfortable. In some ways, hiring counsel is like bringing on a new staff member -- you need to feel that you can work closely and directly with the individual(s) through planning and candid discussions.

Your first step in selecting a consulting firm is to let firms know that you're considering hiring someone for a fundraising project. A list of some of the national firms with Scouting capital fundraising experience is in the Resources section, but it is far from a complete list. There are also local and regional consulting firms you may wish to consider – a firm that has already done a number of campaigns in your state or community may prove to be particularly helpful. Check out the firm's Web site, and consider talking with previous clients of the firm for more candid (albeit subjective) comments. A sample request for proposal letter is in the Resources section.

From the responses you receive from these firms, select two or three of them to meet with your council and make a presentation. Refer to the 20 Questions for Capital Campaign Consultants in the Resources section to prepare for this interview. To make your best decision, it's important that you try to get the same information from each firm. Similarly, it's important that the same people representing the council hear each presentation. Customarily, a council will ask its development committee, executive board, or an ad hoc pre-campaign planning committee to interview the firms and select the one to be engaged for the study.

Upon selection of the firm, you'll negotiate a signed agreement between your council and the selected firm. Your agreement should include:

- A clear outline of services to be provided by the firm.
- Who from the firm will be assigned?
- A range of number of interviews to be conducted.
- The timeframe in which interviews are to be conducted.
- When and in what manner the report will be delivered.
- Fees and any related costs for the work and when payments are due.

The contract should not bind the council to the firm beyond the feasibility study period. It should be clearly understood that consideration of campaign counsel should be determined following the study.

STEP FIVE-B: CONDUCTING THE SELF-STUDY

If the council determines to conduct its own pre-campaign feasibility self-study, you will find it helpful to refer to the Feasibility Study Guide document in the Resources section. It includes advice for selecting constituents to be interviewed, advice on conducting the interviews and preparing the findings, and a sample study interviewer questionnaire. The Resources section also includes a list of books and manuals with useful sections on conducting a pre-campaign study.

STEP FIVE-C: PRESENTING THE STUDY FINDINGS

This is best done at an executive board meeting called for this purpose. The consultants – or the staff member/volunteer team, if the study was done without outside consultants – will walk through the statement of need, discuss the time frame and number of interviews conducted, graphically present the tabulated information, and outline a series of specific recommendations for the campaign.

The board should be encouraged to ask questions and seek understanding on any aspect of the findings or recommendations.

A final thought: Don't discount or attempt to invalidate the study because the results are not what you expected. Properly conducted, the interviews will capture the community assessment of the Boy Scouts, the council activity, views on the plan, and the availability of funds to finance the proposed objectives. You may not agree with the findings – or at the very least you may be surprised by them. But using the feasibility study's recommendations as a road map to ultimate success is usually the best route for a council to take.

STEP FIVE-D: TIMETABLE FOR A FEASIBILITY STUDY

Interviewing and selecting a fundraising firm	2 months
Completing case statement.....	2 weeks
Preparing constituent interview list	2 weeks
Securing interviews	3 weeks
Conducting interviews.....	3 weeks
Preparing findings	3 weeks
Presenting report to the executive board.....	2 hours

STEP SIX: STAFFING THE CAMPAIGN

The feasibility study has been completed and its findings presented to the executive board. The board now has a better feel for the council's position and standing in the community, local reactions to the proposed campaign, and a general idea of the type and amount of support they can expect. The recommendations resulting from the study provide you with next steps and the projected length of the project.

It is important to meet with key volunteer leadership and senior staff to determine what additional personnel resources (if any) you need to assist you in the structuring and implementation of your plan. This honest self-assessment will help you determine if you need fundraising counsel for the actual campaign and, if so, how much help you'll need.

You have three basic options in staffing a campaign: 1) Doing it all with current staff resources, or 2) contracting with fundraising counsel to help prepare and monitor the campaign plan, or 3) contracting with fundraising counsel to serve as a resident director of the campaign. The costs will vary based on the time for which you contract, the level of direct involvement you expect, support services you require from the firm, and travel and lodging costs if the consultant must travel to your location.

As a benchmark, **if you are spending more than 12 percent of your campaign goal on all fundraising costs** – consulting, materials, kickoffs, celebrations, etc. – your costs are considered high, except in unusual situations.

STEP SIX-A: QUESTIONS TO DETERMINE WHAT SUPPORT YOU REQUIRE

A small group of key volunteer leaders and senior staff should meet to assess the council's ability to implement the campaign. Some of the questions you must consider:

What is our current level of staffing in the council?

1. Can we allow the Scout executive to dedicate half or more of his time to the capital campaign and still achieve operational objectives?
2. Who currently has responsibility for fundraising efforts at the council? What programs and fundraising efforts are implemented during a year? How much staff and volunteer time is required to implement these efforts?
3. Is there a member of the professional staff with capital campaigning experience? Are they willing, and do they have the time to serve successfully in the campaign director role?
4. Do you have the internal resources, including creative capability and time, to implement any marketing and communications recommendations?
5. Are there operational events that will require staff to put the planning or implementation of the campaign on the "back burner" during periods of the year?

Answering these questions will help you shape your next steps. When you talk to a firm, you need to focus your questions based on your needs. If you need marketing support, ask for specific information regarding their experience in building and implementing plans for organizations similar to yours. If you need fundraising experience, what support will the person working on your account have from the rest of the firm?

STEP SIX-B: OPTION – GOING IT ALONE

The least expensive option is to take the information gained through the feasibility study and, using staff and volunteer leadership, build and implement marketing, cultivation, and solicitation plans to achieve the objective. If the feasibility study showed that the council had plenty of community support for the campaign and its underlying project, this may be a perfectly reasonable option.

Some advantages to proceeding without consulting help include:

1. Involves the least expense.
2. Forces a high degree of project “ownership” on the staff and volunteers.
3. Involves all levels of the organization.
4. Allows knowledge of the local community to play a more significant role in tailoring and implementing the plan.

Some of the concerns about going it alone include:

1. Operational objectives competing for staff time and energy are likely to force capital campaign planning and implementation to secondary status.
2. Design and implementation of a marketing plan is often an attempt to do more of what has been done in the past, rather than taking an entirely new direction.
3. Lack of understanding of all steps and their order within a capital campaign can lead to starts and stops, lengthening the timetable and creating the appearance of disorganization.
4. Decisions are made based on dedication to Scouting, rather than the facts at hand.
5. Local leaders often will take the path of least resistance in determining expectations for giving. This can result in under-asking prospects and attempting to make up the goal through a volume of small gifts to the campaign.
6. If, once you’ve announced the campaign, any critical mistakes are made, it’s very difficult to go back and start over again.

As a general guideline, a council can expect to **budget between 3 and 6 percent of the projected campaign goal.** Our example allows a budget for some limited outside service expense. This would include the cost of publication writing or design, facilitating a board retreat, or assisting with the specifics of planning a kickoff and/or victory party.

STEP SIX-C: EXECUTIVE COUNSELING

If you decided that you had the resources to implement the plan, but decided that you needed assistance in planning, prospect research, and direction during the implementation of the marketing and capital campaign, this may be a good option. It may also be a good option if the feasibility study raised some concerns about the campaign or the project.

This option allows you to contract with a consulting firm for either a specific number of days each month during the initial phases or throughout the entire campaign period. You will outline with the firm what services you require (e.g., writing and designing the case statement, designing a communications plan, drafting the campaign plan, recruiting and training leadership volunteers, prospect research, preparation of proposals to foundations).

Executive counseling can range from two to 10 days per month, depending on the specific assistance required by the council. The exact time you need must be determined jointly with the firm you select.

You need to seek from the firm:

1. How many days per month will you receive?
2. How does the firm account for on-site and off-site time?
3. What will the council receive and when during the agreement?
4. Can the firm be flexible in the number of days given each month over the life of the contract? No campaign happens at one steady pace. During the periods when you will require intense support, can days be “borrowed” from other periods of the contract?

Some advantages to executive counseling include:

1. Allows you to contract for the services, expertise, and leadership you require to design and run the campaign.
2. Brings outside perspective to issues and proposed solutions.
3. Consultant brings experience, planning, and training. Local implementation ensures active involvement and helps create long-term relationships for Scouting with prospects and donors in the community.
4. Without operational responsibilities, focuses energies in developing and remaining on task in support of the capital campaign.
5. Keeps the discussion and issues fact-based.
6. Challenges decisions regarding prospect cultivation and solicitation to ensure the best requests are made.

Some concerns about executive counseling:

1. If not on-site all the time, it may require careful scheduling of meetings to fit into the visit dates.
2. How do you measure progress?
3. What adjustments can be made if unexpected situations arise?
4. What support does the assigned consultant have from the consulting firm?
5. Will the firm be attentive to the needs of your program, given other campaigns in which it is engaged?
6. Limited accountability and authority to make things happen.

Consulting fees will vary. **For example, you can expect to spend about \$75,000 in fees for six days of consulting assistance per month for a year.** Depending on the number of days of consulting assistance you require, **a council should plan to spend between 6 and 9 percent of the campaign goal for all fundraising costs using this option.**

STEP SIX-D: RESIDENT DIRECTION

This is the most hands-on assistance you can have. In selecting resident direction, your council anticipates it will need nearly full-time support throughout the campaign. In this option, the counsel works on-site as a de facto member of the staff. Except for large campaigns or special circumstances (such as some potentially serious issues that the feasibility study may have revealed), a council may find this option is unnecessary.

Some advantages to resident direction:

1. Council has the undivided attention of the resident director, since you are his/her only client.
2. The resident director serves as a member of the staff, working at the council office on a daily basis.
3. The resident director can reach volunteers quickly and can respond in person to a volunteer's request in a timely manner.
4. The director monitors plans and implementation as an ongoing part of his/her job, using reports and personal observations to assess status.
5. The director assists with cultivation and solicitation calls to a greater degree than available through executive counseling.
6. The director implements a proven process in a specific time frame and provides important campaign discipline.

Some concerns about resident direction:

1. Campaigns do not march at a steady pace, and there are periods when the council is paying for much more time than it requires.
2. Staff leadership of the campaign can transfer from the Scout executive to the resident campaign director.
3. The resident director will develop relationships with donors and prospects. While this is beneficial in the short term, because this person leaves at the end of the campaign, the long-term relationships with these individuals can be lost.
4. It adds a significant cost to the overall campaign.

For nine to **12 months of assistance**, you can expect consulting fees in the **range of \$150,000 to \$250,000 for full-time resident direction services**. Typically, **10 to 13 percent of the campaign goal will be spent on all fundraising costs** with this option.

STEP SEVEN: CARRYING OUT A CAMPAIGN

Following the feasibility study, there are eight areas (A-H) of planning for a capital campaign that will require attention. For further insights into conducting a campaign, you may find it helpful to refer to the suggested reading list in the Resources section of this guide.

STEP SEVEN-A: STAFFING

Staffing the campaign will include professional Scouters, board and community volunteers, and campaign consultants. Some of the expectations include:

- The **Scout Executive** will need to commit at **least one-third of his time** to the capital campaign. This includes public functions, cultivation, solicitation, planning, meetings, and support to campaign leaders. If the council elects to conduct the campaign without consultant support, this amount of time will increase.
- **A member of the administrative staff will need to commit 50 percent of his/her time to supporting the campaign.** This includes record-keeping, preparing and mailing letters, report tabulation, committee meeting preparation, prospect record-keeping, gift management, and acknowledgements. In many cases, the council will hire a part-time support staff person through a temporary agency for this purpose.
- If the council elects to move forward with the same firm that conducted the feasibility study, a new contract based on the options the board elected in the prior section of this publication needs to be prepared. If the board elects to go with another firm, which occasionally happens, you will need to resubmit a request for proposal to firms you wish to consider for this stage of the campaign.
- Volunteer leaders must be recruited to the campaign. This includes the general campaign chair, a person of the highest regard in the community; and division chairs for each anticipated segment of the campaign, including board, leadership gifts, major gifts, staff, Scouting family, community, businesses, and foundation.
- Volunteers must be recruited to make solicitation visits within each division. Divisions are usually staffed so that no volunteer is required to make more than five visits and all prospects in the division can be personally solicited.

STEP SEVEN-B: BUDGETING

In addition to outside contracting for services, there are a number of significant expenses in supporting a capital campaign.

- The council must budget for printing of reports, newsletters to support the campaign, stationery, envelopes, case statements, invitations, committee meetings, postage, cultivation costs, marketing materials, donor recognition, office space, administrative secretarial support, and equipment.
- Within policy, the council may also elect to charge to the campaign the salary and benefit costs for a portion of staff time supporting the campaign.

STEP SEVEN-C: PLANNING WITH AN OVERSIGHT COMMITTEE

- Outline the timeframe and order in which work must be accomplished to achieve the capital campaign objective. You may find it helpful to see the sample campaign time line in the Resources section.
- Select a capable chairperson who can manage a volunteer committee with knowledge of construction management, legal contracts, design issues, architectural issues, etc. Include key donors and board members to

insure costs are within budget and projects are completed on time.

- Review donor and prospect lists, and place each in an appropriate division. Also identify the one or two best possible volunteers to make the solicitation.
- Define key messages for marketing and public relations efforts. These must be shared and understood internally before they go “public.”

STEP SEVEN-D: COMMUNICATIONS/PUBLIC RELATIONS

- Build a marketing/public relations program that focuses on the capital campaign but includes other council activities and messages. This is an opportunity to address the observations from the feasibility study.
- Decide what stories the council will tell to represent the accomplishments of Scouting. This matrix of stories should include all levels of Scouting, represent the demographic and geographic makeup of the council, and demonstrate how Scouting is an integral part of the community. Make them as personal and heartwarming as possible.
- This is an ideal time to publish and widely distribute an annual report, if the council does not already do so. In addition to Scout families, current donors, and board members, include business leaders, elected officials, past major donors, family members of those who formed the council, and everyone interviewed in the feasibility study.
- Implement year-round communications activity. Include traditional (e.g., speaking to civic groups, newsletters, and annual meetings) with other activities (e.g., publication of an insert in the local paper, small gatherings of community leadership in a board member’s home, and focus groups to discuss programs), and aggressive placement of news and feature information with area media outlets.

STEP SEVEN-E: CULTIVATION

- Starting with the top donors and best prospects, build a profile sheet for each person. This will include name, address, business associations, foundation board memberships, background with Scouting, relationships to other donors or prospects, past giving history to Scouting, and other notable gifts to the community.
- The campaign steering committee and Scout executive must determine the council’s best way to contact the top individuals and make a request for a meeting through that avenue.
- Determine what you seek from each meeting. Remember that cultivation is done over a period of time and set your sights accordingly. The first meeting or two will allow you to learn more about the prospect and their interests. You can then begin to shape your message in accordance with the information you have gathered. After each cultivation meeting, you must identify the next steps in building a stronger relationship with the prospect, what should be done, when, and by whom.
- Ask the prospect for his/her opinion on issues for Scouting. Including them will help establish a place for them in the council’s constituency.

STEP SEVEN-F: SOLICITATION

- Your top prospects will account for more than half of the campaign goal. Determine their level of support and gain their pledge before going public with a goal and campaign.
- You make a request when you feel you and the prospect know each other well, and their questions have moved from understanding your mission to asking about your accomplishments and needs. When making a request, control the forum and message. Don't allow a major request to occur by accident; establish the meeting and place – preferably on the prospect's turf. Recap the plans and goal. Ask for a specific amount and let them know this is a leadership gift to the campaign.
- After making the request, wait. The next person to speak should be the prospect. It's called the "assertive ask." Some campaigns may use a two-call system approach, by using a "second" ask after the first ask - usually a "think about" dollar amount, then a request for real.
- Be prepared to answer questions about the campaign, the size of the proposed gift, and what giving options are available. Will you accept stock or life insurance policies; can this be part of a bequest and count in the campaign?
- Major gift requests may take more than one meeting to finalize. Often the prospect will need to discuss it with family or financial advisers. If necessary, set up the next meeting before leaving. Let them know their answer is important.

STEP SEVEN G: ANNOUNCING THE CAMPAIGN

After you have nurtured and solicited your board and leadership gift donors, it is time to announce your campaign to the general public.

- Based on the level of commitment during the initial phase, see if an adjustment to the announced goal is required. Remember, campaigns are determined by the 20 largest gifts. Shortfalls in this area will not be made up in a larger number of small gifts.
- Pick a time and place that will allow the maximum number of community members to attend, along with the executive board and campaign steering committee.
- Attempt to have the campaign "come to life" in a manner that will build excitement and media attention. A campaign goal might be news to you, but unless there is a "hook," the media may elect not to cover the event.
- Let people know where you are with gifts to date and the time in which you plan to complete the campaign.
- Ask them to join in the effort.
- The public phase is when the vast numbers of volunteers will implement the family and general community solicitations. While the total dollars raised will be small, it is labor intensive to keep track of the solicitations and results. This will be one of the most time-consuming periods of the campaign.

STEP SEVEN-H: CLEAN UP

Before you celebrate the campaign's success, the council needs to review its work. With the campaign steering committee, you must review the status of the requests on all major gifts.

- If final decisions have not been received, conduct follow-ups with the solicitor and prospect as needed.
- There are some people who will wait on a final decision. Sometimes they want to see if you will come back to them; other times they want to see if the rest of the community will give. Some like to give the gift that appears to put the campaign over the top.
- Make sure everyone has the chance to make their commitment before you announce the total for funds raised.

At the conclusion of the campaign, be sure a formal written closeout report is prepared. If outside counsel was used, this should be presented at a meeting with all campaign leaders to review the final report of results and their observations and recommendations.

STEP EIGHT: FOLLOW-UP

The best time to plan your next campaign is soon after your victory party for the current effort. Build on the enthusiasm and good feeling that comes from a successful campaign. Given the lead time required to conduct a campaign, you can invest now in the planning and be ready in a few years to announce plans for further council growth.

Maintain donor contact following the campaign and the implementation of new programs or dedication of new facilities that resulted from the campaign. Most people who have given to build something will consider operational gifts to permit the new or enhanced activities to occur. Many councils report **a 15 to 20 percent increase in the amount given on Friends of Scouting campaigns following a successful capital campaign effort.**

STEP NINE: RECOGNITION

It is important to recognize donors, volunteers, and staff when completing a capital campaign, whether the goal is reached or not. Donors enjoy receiving appreciative phone calls and letters from the chairs of capital campaign, from other known and respected board members, or even staff. Sometimes, a note of thanks from some of the youth who benefited from the gift, like from Scouts and Scout leaders. Recognition should be timely, usually within the first three to five days after the gift is received. Long-term recognition can be a naming opportunity on a capital project or building, or their name on a wall of honor. There are many ways to acknowledge donors, volunteers, and staff. Be creative. But most important...recognize them for their generosity.

STEP TEN: RESOURCES

Check the Finance Impact Web site (www.scouting.org/financeimpact) for the most up-to-date fundraising material, including sample foundation proposals, sample project sales requests, current FID publications, audiovisual products, and an educational seminar schedule. **Also review the Pre-Campaign Readiness Assessment Questionnaire on the FID Web site. (www.scouting.org/financeimpact > Council Fund Development > Capital**

The following material will be found in this section:

- Readings on Capital Campaigns
- Strategic Plan – Sample Work Schedule
- Feasibility Study Guide
- Sample Feasibility Questionnaire
- 20 Questions for Capital Campaign Consultants
- Fundraising Consulting Firms
- Draft Letter Requesting Proposals From Consultants
- Sample Capital Campaign Planning Timetable

Readings on Capital Campaigns

The following are books on capital campaigns that have been recommended by fundraising experts. The list was drawn from *The Non-Profit Handbook*, *The Chronicle of Philanthropy* annual resource guide for charity leaders.

1. *Hank Rosso's Achieving Excellence in Fund Raising* edited by Eugene R. Tempel. This award-winning book explains the major principles, concepts, and techniques for successful fundraising, including capital campaigns. Details the steps to be taken in the fundraising cycle.
Publisher: Jossey-Bass Publishers, 350 Sansome Street, San Francisco, CA 94104; 800-956-7739
2. *Blueprint for a Capital Campaign: An Introduction for Board Members, Volunteers and Staff* by Christine P. Graham
A guide to planning a capital campaign. Offers advice on how to set feasible goals for a campaign, find prospective donors, write an effective case statement, and coordinate the efforts of volunteers and consultants.
Publisher: CPG Enterprises, P.O. Box 199, Shaftsbury, VT 05262; 802-447-0256
3. *The Capital Campaign in Higher Education: A Practical Guide for College and University Advancement* by G. David Gearhart
Much of the content applies to capital campaigns for organizations outside of higher education.
Publisher: National Association of College and University Business Officers, 2501 M Street, NW, Suite 400, Washington, DC 20037-1308; 202-861-2560
4. *Capital Campaigns: 21 Ways to Reach Your Goal*
Includes articles describing the techniques organizations have used to reach their capital campaign goals. The articles first appeared in *Currents*, the magazine published by the Council for Advancement and Support of Education.
Publisher: Council for Advancement and Support of Education, 11 Dupont Circle, NW, Suite 400, Washington, DC 20036-1261; 202-328-5900

5. *Capital Campaigns: Strategies That Work* by Andrea Kihlstedt

Explains how to plan and carry out a capital campaign. Topics discussed include how to work with a campaign consultant, conduct a feasibility study, solicit major gifts, incorporate special events into the campaign, recognize donors and volunteers, and evaluate the campaign.

Publisher: Jones & Bartlett Publishers, Inc., 40 Tall Pine Dr., Sudbury, MA 01776; 800-832-034

6. *Conducting a Successful Capital Campaign: A Comprehensive Fundraising Guide for Nonprofit Organizations* by Kent E. Dove – Second Edition

Explains the basics of planning and managing capital campaigns. Shows how to figure out the amount that can be raised, as well as how to get board members involved with the campaign, recruit and train volunteers, solicit donations, publicize the campaign, and handle daily mechanics such as budgets and gift acknowledgements.

Publisher: Jossey-Bass Publishers, 350 Sansome Street, San Francisco, CA 94104; 800-956-7739

7. *Campaign Manuals* edited by Jeanine Builta

A loose-leaf manual with forms, samples, schedules, checklists, and plans for conducting a capital fundraising campaign.

Publisher: Third Sector Press; 216-831-9300

8. *Successful Capital Campaign: From Planning to Victory Celebration* edited by H. Gerald Quigg

Shows how to involve everybody associated with an institution in a capital campaign. Also explains how to identify and train new campaign leaders, motivate trustees and volunteers, and administer the campaign. Although written specifically about capital campaigns in higher education, many of the topics discussed apply to campaigns run by other types of nonprofit organizations.

Publisher: Council for Advancement and Support of Education, 11 Dupont Circle, NW, Suite 400, Washington, DC 20036-1261; 202-328-5900

STRATEGIC PLAN – SAMPLE WORK SCHEDULE

A detailed outline of the specific work and objectives to be accomplished through this process is found in the publication *Local Council Strategic Planning a Benchmark for Success*, No. 30-535. Although this sample work schedule is based on nationwide experience, many councils report that the planning took longer.

Month One First Meeting, Long-Range Planning Committee

- List strengths, weaknesses, opportunities, and threats to the council
- Organize planning committee
- Create and activate a membership subcommittee

Month Two Second Meeting, Long-Range Planning Committee

- Hear progress report membership subcommittee
- Propose personnel for subcommittees: quality program, organization and personnel, office, land, and facilities
- Make sure necessary preliminary data is being gathered for the work of subcommittees

Month Three Third Meeting, Long-Range Planning Committee

- Hear report of membership subcommittee
- Discuss and adopt projections
- Activate subcommittees on quality program, organization and personnel, office, and assets management

Month Four Fourth Meeting, Long-Range Planning Committee

- Hear progress reports by active subcommittees
- Propose personnel for subcommittees: finance, presentation, and sales

Month Five Fifth Meeting, Long-Range Planning Committee

- Hear reports from subcommittees: quality program, organization and personnel, office, and assets management
- Discuss and adopt reports and recommendations
- Activate subcommittees on finance and presentation and sales

Month Six Sixth Meeting, Long-Range Planning Committee

- Resolve unfinished business from previous reports
- Hear progress report from finance subcommittee
- Discuss implementation of the overall plan
- Representatives of the presentation and sales subcommittee should be present

Month Seven Seventh Meeting, Long-Range Planning Committee

- Hear report by finance subcommittee
- Discuss and adopt finance report
- Hear report/ discuss presentation/sales plan. Assign presentation team
- Set date to rehearse overall presentation

Month Eight Council Executive Board Meeting

- Present long-range plan
- Adopt the plan
- Activate the plan
- President assigns basic responsibilities for carrying out the plan
- President appoints any necessary special committees
- President schedules local council action
- Recognize and discharge the long-range planning committee

FEASIBILITY STUDY GUIDE

While most councils will retain a professional fundraising firm to conduct a feasibility study, in limited situations it may be practical for a council to do a self-study. This will involve the council's senior development officer and volunteer members of the development committee or an ad hoc pre-campaign committee. The following procedures are recommended for councils undertaking their own independent pre-campaign study. You will also find useful advice on conducting a study in the various books listed in Readings on Capital Campaigns, in the Resources section.

Selecting Prospects to Be Interviewed

Selecting the right individuals to be interviewed is a critical step in the feasibility study. This group must be representative of the community, its leadership, and opinion makers. Just as political polls select a small number of individuals to measure public concern, your sample will shape the public awareness and support for this effort.

This group of interviewees must include those your council believes to be your most influential constituents, those who are community and potentially campaign leaders, and the largest potential donors to this effort. You must select a representative cross section of your communities, taking geography, ethnicity, wealth, and Scouting involvement into consideration – but also include some of your best prospects for financial support.

To conduct **40 to 75 interviews, the council will need to identify 75 to 100 possible interviewees**. In building the list, the following categories should be considered:

- A select number of executive board members. These can often be individuals who would have otherwise been selected because of their personal ability to support the campaign or through corporate or foundation means. You must not allow your board to become a high percentage of those interviewed, or you risk the chance of skewing the findings and recommendations of the study.
- Ten largest contributors (lifetime giving) to your council.
- Ten largest annual contributors to your council.
- Twenty wealthiest individuals living in your council area.
- Twenty individuals, corporations, or foundations believed capable of making a gift of at least ten percent of the campaign goal.
- Twenty most influential community leaders in the council area. This can include elected officials, CEOs, community advocates, leaders of civic organizations, college or university officials, United Way leaders, those who have led other community efforts, or other public-opinion leaders.
- Ten largest donors to your last capital campaign (if in the last 10 years).
- Five most influential people within the council. These can be unit leaders, involved parents, and district or council volunteers.
- Others you feel will have a direct bearing on the campaign's success. Your council volunteer leadership is usually involved in helping secure the interviews. Often the executive board has the contacts to open doors for interviews that staff members and the consulting firm would not be able to open. The council's leadership volunteers may be asked:

- To select five to 10 people from the interview list they know and would be willing to contact for an appointment.
- To commit to personally call the prospect to request 30 minutes of their time to gain their opinions on Boy Scout plans. They can make it clear this is not a solicitation call.
- To let the prospect know that we want his/her opinion before finalizing important plans for the council's future.
- To secure the interview for one of the selected days and times for study interviews.
- To call the Scout office with the name of the person to be interviewed, location of interview, date, and time.

The Scout office finance staff should:

- Maintain the master list of prospects, dates, and times for interviews.
- Send a letter confirming the interview following the call by the board member. The letter may include a preliminary case statement for review prior to meeting.
- Prepare interview schedules, maps, and directions for the interviewer.
- Generate thank-you letters following each day's interviews.

Conducting the Interviews

Interviews should be conducted in person and by a single interviewer. The person interviewed will understand that all answers are confidential, and they will not be quoted by name. Knowing this allows the interviewee the latitude to speak candidly.

The interviewer will seek answers to the same questions from all those interviewed. A sample questionnaire is provided in the Resources section. Combined with the comment section, these questions will provide the answers from which you can formulate the next steps toward a campaign.

If a firm is conducting the study, the council will not see the interview sheets, nor will results of specific interviews be discussed with the executive board or the Scout executive. Should the council conduct its own feasibility study, it must find a method to ensure an absolute minimum number of people have access to the individual responses.

Preparing the Findings

Following the interviews, the results of all interviews are tabulated. Results should be compiled for each question on the interview form. It is also advisable to cross tabulate the results by prospect group (e.g., board members, top 10 prospects, businesses, etc.). This allows you to see if there are any trends for a specific group of people interviewed or observations by the entire group.

Customarily, a feasibility study report will also include specific comments by interviewees, without attribution. Including supportive comments and suggestions from those interviewed will help give the answers flavor and tone.

Finally, the report will generate a number of conclusions and recommendations. Based on the interview results and other findings, this will outline the next steps and critical issues that must be addressed in going forward with a campaign.

Sample Feasibility Questionnaire

_____ Council
Boy Scouts of America
Confidential Feasibility Questionnaire
Person Interviewed: _____ Date: _____
Company: _____ Position: _____
Address: _____
City: _____ State: _____ Zip: _____
Business Phone: (____) _____ Home phone (____) _____
Secretary's Name: _____

1. Are you associated in any way with the local Boy Scout council?

Yes _____ No _____

Comments: _____

2. How do you perceive the **public** image of the local Boy Scout council?

Excellent _____ Good _____ Average _____ Poor _____ Unaware _____

Comments: _____

3. In your opinion, are the projects presented in the NEEDS STATEMENT needed?

Yes _____ No _____

Comments: _____

4. Personally, where do the Boy Scouts and the projects presented rate on your priority list of philanthropic and community service?

High _____ Reasonable _____ Low _____ Unnecessary _____

Comments: _____

5. If the local Boy Scout council were to launch a capital campaign, how well would it be received by the public?

Receptive _____ Unreceptive _____ Indifferent _____

Comments: _____

*At this point, give the person being interviewed the Table of Gifts chart and announce a probable campaign date. Ask the respondent to assume a three-year pledge payment.

Sample Feasibility Questionnaire (cont.)

6. Is the goal of \$ _____ attainable?

Yes _____ Maybe _____ No _____ No response _____

Comments: _____

7. Is the top gift attainable?

Yes _____ Maybe _____ No _____ No response _____

Comments: _____

8. Are the next nine gifts attainable?

Yes _____ Maybe _____ No _____ No response _____

Comments: _____

9. Are the next 20 gifts attainable?

Yes _____ Maybe _____ No _____ No response _____

Comments: _____

10. Would you be willing to make a personal gift to support this project?

Yes _____ Maybe _____ No _____ No response _____

Comments: _____

11. What range of gift would you consider?

High _____ Medium _____ Low _____

Comments: _____

12. Would your company participate in this program?

Yes _____ Maybe _____ No _____ No response _____

Comments: _____

Sample Feasibility Questionnaire (cont.)

13. What would you estimate is the size of the gift you would recommend to your company?

High _____ Medium _____ Low _____ No estimate _____

14. What would be the most important factor in determining the amount of your personal/corporate gift?

Comments: _____

15. Would you personally work on behalf of this project? In what position?

Yes _____ Maybe _____ No _____ No response _____

Comments: _____

16. Would you please give me the names of individuals you believe might provide the nucleus of leadership for an effective campaign organization?

- | | |
|----------|----------|
| 1. _____ | 4. _____ |
| 2. _____ | 5. _____ |
| 3. _____ | 6. _____ |

17. What positive factors do you see for the success of the campaign?

Comments: _____

18. What factors are you aware of that may hinder the success of this project?

Comments: _____

19. Are there any additional comments that have not been covered?

Comments: _____

20 Questions for Capital Campaign Consultants

CHECKLIST (x)

- Of the campaigns you directed over the past three years, what percentages of the goals were achieved?
- Before a campaign begins, what services do you provide?
- Prior to the campaign, can we reject the campaign director you assign? What's involved in changing the person and how long will it take?
- How do you charge? How much, when is it due, and is there a refund clause?
- What are the total charges we can expect before, during, and after the campaign?
- Will you provide, for our approval, a comprehensive plan prior to the campaign?
- Will you be working with us in all stages of the campaign: before, during, and through the wrap-up?
- What are the services you provide?
- In the past five years, what are some organizations you've worked with that achieved their goals? Which organizations didn't?
- Will you be producing all printed materials, and is any of the cost reflected in your fees?
- In your judgment, will we need a feasibility study? If so, what will it cost?
- Exactly what role do you see our volunteers and staff playing in the campaign?
- What office space, equipment, and personnel will you need and for what period of time?
- Is your total fee payable even if we don't achieve the goal?
- Tell us about your top three campaign directors. What are their backgrounds, and how did they fare in the last three campaigns they each directed?
- If you believe we're too ambitious in our goal, what steps will you take to align our expectations with reality?
- For a campaign of our size, what is a typical budget breakdown?
- If public relations services are required before and during the campaign, do you provide them?
- In the event we postpone or cancel the campaign, what does that mean for your fees?
- Upon completion of the campaign, will you make a complete report to the board, and will it be in writing?

Capital Campaign Fundraising Consulting Firms

These are the main corporate offices for several national firms with experience in leading successful campaigns for Boy Scout councils. Many have regional offices in various locations across the United States. There are also good local and regional firms to consider in your selection process.

Kelley/Byrne Consulting Group

19722 One Norman Blvd. #220-234

Cornelius, NC 28031

704-892-3415; 877-688-3415

Web site: www.kbcg.com

E-mail: bkscout1334@aol.com

Or

Frank@kbcg.com

Ketchum

Pittsburgh Office

Three Gateway Center, Suite 448

Pittsburgh, PA 15222

412-355-2379, 800-242-2161

Dallas Office

5151 Belt Line Road, Suite 900

Dallas, TX 75254

214-866-7700; 800-242-2161

Web site: <http://ketchum.viscero.com/cms/index.html>

E-mail: info@viscero.com

Bradley Associates Consultants

3150 Almaden Expressway, Suite 104

San Jose, CA 95118-1253

408-978-8400; 800-671-1301

Web site: www.bacwest.com

E-mail: vince@bacwest.com

Hartsook Companies, Inc.

9320 East Central, Suite 200

Wichita, KS 67278-2890

316-630-9992

Web site: www.hartsookcompanies.com

E-mail: tami@hartsookcompanies.com

Sample Draft Letter Requesting Proposals From Consultants

Date

Name of Consulting Firm
Address
City, State Zip

Dear Firm Representative:

The (name) Council, Boy Scouts of America, is accepting proposals to conduct a feasibility study in advance of our anticipated capital campaign.

(Include a paragraph telling a little about the council and the general size of the project to be tested. You don't have to go into great detail, but it will save you some phone calls from firms seeking to learn more about you prior to submitting a proposal.)

Please submit your written proposal by (give them a date about three to four weeks from the letter date). Include in the proposal your approach in delivering a feasibility study, your qualifications for conducting a study, a list of references for campaigns conducted within the past three years, and your proposed fees.

If called to make a presentation to our (committee, officers, executive board), please plan to include the project manager you would assign as part of your presentation team. Questions regarding this request should be directed to (name and phone number).

Sincerely,
(name)
Scout Executive

