

Capital Campaign for McKenzie River Trust

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PPPM 581 Fundraising
Review & Consultation Assignment

CAPITAL CAMPAIGN FOR MCKENZIE RIVER TRUST

GOAL

Raise \$2,000,000 over two years for the purchase of 5 miles (500 acres) of riverfront property on the McKenzie River.

MAJOR GIFT SOLICITATION

Approximately 90% of campaign funds should come from 10% of the donors. This is the opposite of an annual campaign, in which McKenzie River Trust (MRT) has established success, so it is important for all involved to adapt to major donor cultivation. They must establish a plan to recognize donors differently from what was established for annual giving. Personnel must be trained, and volunteer leaders must understand the amount of effort it takes to raise a gift.

Sequential fundraising requires gifts solicited in a strict order from largest to smallest and from top down and inside out. MRT should solicit the largest advance gifts from those closest to the organization and then move on to leadership and major gifts, making up the silent phase of the campaign. Once public, MRT can solicit special gifts and general gifts to make up the broader base of smaller donations.

First steps will consist of prospect research, identification, and cultivation. Since MRT has a high retention rate, this process should already be in place for most potential campaign donors. It will be essential to have a strong case statement in preparation for donor solicitation, with emphasis on the special project, the uniqueness of the opportunity, and the weight of what it means for the community. The McKenzie River is integral to health of the community and the organization's identity. MRT should focus on the importance of the river, taking advantage of the opportunity to generate awareness and excitement around such a special body of water. MRT can leverage the \$500,000 matching challenge grant from Eugene Water and Electric Board (EWEB) to encourage larger donations. It is important to assign the right person to each prospect once cultivation begins, continuing to research and expand the organization's knowledge and relationship with the donor until the right time for the ask.

CAMPAIGN PLAN [Timeline and Gift Range Chart attached]

Prior to any solicitations, MRT must set up internal systems and procedures necessary to accommodate the campaign. This includes a gift policy, any additional data management systems, plans for donor recognition, and ensure that the development office is well organized. The entire organization must be made aware of the importance of the effort. Marketing, communications and training materials must be prepared once the case statement has been finalized. These should include a campaign brochure, major gift prospectus, Q&A pamphlet, annual report, pledge cards, newsletter, and volunteer handbook. A fundraising committee must be established, and an advisory committee is recommended to connect those whose names may lend credibility. MRT may ask potential donors for advice in campaign planning to increase support and involvement.

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The campaign must not go public until at least 50% of the goal (\$1,000,000) is raised. During the silent phase, all leaders should be recruited and trained, the case statement solidified, publications prepared, and advance, leadership, and major gifts solicited. It is vital not to rush at this stage, but to ensure that all possible top donors have been solicited and all board members and other close stakeholders have made their gifts. There must be full and complete support of the board and staff, with board members being first to make their gifts. Due to the success of the \$1,000 Giving Club, developing giving societies and tangible naming opportunities unique to the campaign (and inspired by the river) will be essential to success.

Donors should be asked to make gifts in addition to their annual gift, with campaign donations being distinguished for the special land acquisition, and annual gifts being communicated as a separate, but still very necessary, request for continued regular support. The spring membership campaign should remain in-tact, but the summer campaign should be reprogrammed to focus on campaign efforts.

McKenzie River Trust has had high success in the past with broad-based direct mail, which will be important during the last phase of the campaign. Mail has been reliable for them in the past, but their donors who are giving online have demonstrated that they are actually giving a higher amount. MRT might consider implementing a crowdfunding program during the last phase of the campaign to encourage a greater number of gifts, capitalize on the energy of reaching the end of the campaign, and take advantage of social media and the potential to reach more (and younger) donors. Social media is a great way to boost crowdfunding, and as MRT nears the end of its campaign such a high visibility giving platform would increase awareness about the river and the campaign's success. Crowdfunding is easy to track, allows the publicly display of campaign progress, and can generate excitement.

McKenzie Memories and the Living River Celebration will take on greater influence as both campaign launch and campaign celebratory closing events. MRT will need to raise funds to host these events. They might engage a particular donor to fund one of the events. It could be an exciting opportunity as a donor to be associated with the public launch of the campaign. In addition, they might sell tickets to a special opening banquet in conjunction with the launch, or host a raffle for a unique experience such as a river trip or guided fly fishing expedition.

REFERENCES

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McKenzie River Trust. (March 3, 2016). Retrieved from: <http://mckenzieriver.org/>

Worth, M.J. (2016). Fundraising principles and practice. Los Angeles: Sage.

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CAMPAIGN TIMELINE

PHASE I – ORGANIZATIONAL

(4 months; September – December 2016)

- Build internal consensus
- Case for support, campaign plan, public relations plan, and campaign calendar with list of projects and deadlines
- Hold preliminary planning meetings
- Develop visuals for presentation
- Meet with key members, volunteers and donors; show drafts of materials and ask for input
- Organize and train development office; arrange any needed support staff
- Create campaign operational materials
- Recruit and train campaign volunteer leadership; start with Committee Chair; list influential community members to lend their good names to the cause
- Identify Advance and Leadership gift prospects; begin cultivation
- Finalize donor gift recognition program
- Finalize brochure and other materials
- Secure gifts from board, staff, volunteer leadership and other key individuals

PHASE II – LEADERSHIP GIFTS

(6 months; January – June 2017)

- Solicit prospects for leadership gifts
- Complete recruitment of volunteer campaign committee
- Identify additional leadership prospects
- Complete other campaign materials
- Identify major gift prospects
- Recruit major gift volunteers to expand campaign committee for various constituencies
- Complete solicitation of leadership gifts
- Develop pledge and gift tracking and collection procedures

- Thank and record donors
- Send donors newsletter/annual report

PHASE III – MAJOR GIFTS

(4 months; July – October 2017)

- Solicit major gifts
- Expand volunteer organization for solicitation of special and general gifts and train these volunteers
- Identify special & general gift prospects
- Monitor pledges; thank/record donors
- Send donors newsletter/annual report

PHASE IV – SPECIAL GIFTS & EXPANSION

(4 months; September – December 2017)

- Announce the campaign publicly (goals, leadership and leadership gifts)
- Host campaign launch event as part of the Living River Celebration
- Complete major gifts
- Initiate intensive publicity campaign
- Solicit corporate support
- Conduct solicitation of special gifts
- Finalize general gift prospect list
- Monitor pledges; thank/record donors
- Send donors newsletter/annual report
- Train new volunteers

PHASE V – GENERAL GIFTS & CLOSURE

(6 months; January – June 2018)

- Complete special gifts phase; initiate broader direct mail campaign
- Initiate online crowdfunding campaign
- Solicit general gifts
- Thank and record donors
- Announce end of campaign and hold campaign celebration event in conjunction with McKenzie Memories

\$2,000,000 Capital Campaign Gift Range Chart

McKenzie River Trust

	Gift Level	Number of Gifts	Cumulative Number of Gifts	Number of Prospects	Ratio Prospects to Gifts	Total per Gift Level	Cumulative Total	Percent of Goal
\$	200,000	1	1	2	2:1	\$ 200,000	\$ 200,000	10%
\$	100,000	2	3	6	3:1	\$ 200,000	\$ 400,000	20%
\$	50,000	4	7	12	3:1	\$ 200,000	\$ 600,000	30%
\$	25,000	8	15	32	4:1	\$ 200,000	\$ 800,000	40%
\$	15,000	13	28	52	4:1	\$ 195,000	\$ 995,000	50%
\$	8,000	26	54	104	4:1	\$ 208,000	\$ 1,203,000	60%
\$	5,000	40	94	160	4:1	\$ 200,000	\$ 1,403,000	70%
\$	3,000	132	226	396	3:1	\$ 396,000	\$ 1,799,000	90%
132 donors/1327 total donors = 10% of donors providing 90% of the campaign's goal								
\$	1,000	101	327	303	3:1	\$ 101,000	\$ 1,900,000	95%
\$	100	1000	1327	2000	2:1	\$ 100,000	\$ 2,000,000	100%