



h Brakeley Briscoe

Considering Philanthropy

Fall 2014

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Conducting a Campaign Feasibility Study

by Alden Briscoe, MAT, Executive Vice President

When a client asks us to conduct a feasibility/planning study for a capital campaign, they want us to answer two questions:

- 1) Assuming there are donors willing to give money to achieve the goals of their campaign, what does the institution need to do to prepare internally for the campaign? This includes changes or upgrades to the foundation or fundraising staff, top management, and the board(s) as well as systems, processes, and procedures. It may also include recommendations for what the medical and administrative staff can do to help fundraising.
- 2) Where is the money for this campaign, how much is there, and how do we structure the cultivations and asks to get it?

For the “internal phase” we begin by learning as much as we can about the hospital or system and the foundation. We review your vision, mission, bylaws, recent board minutes, reports from the database on donors and potential donors, grant proposals, fundraising request letters and emails, and telephone calling scripts. We look at your use of social media including website, and we also interview key fundraising staff and board members involved in fundraising.

We look at your knowledge and use of your fundraising software as well as

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The Seven Deadly Sins of Campaign Fundraising

In looking over our archives recently we found an article which is as true now as it was forty years ago when it was first published in our company's newsletter so we are reissuing it.

A professional fundraiser or development director could draw up his own list of “deadly sins” with respect to activity (or non-activity) in a capital campaign or development program. Surely, however, any such list would contain several of the following, since these are the “sins” that are committed all too frequently.

- 1) **Unpreparedness:** No campaign or development program should be launched until strongly affirmative answers can be given to the following

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The Seven Deadly Sins of Campaign Fundraising

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questions: Is strong leadership available? Is the case for the institution or program genuinely strong? Are there verifiably good sources of support? Is the campaign or development program timely? Is there evidence of strong motivation on the part of the leadership?

All of the foregoing come under the heading of campaign readiness, and weaknesses in any of these areas can only lead to trouble, if not disaster. On the subject of preparedness for a trial, a New York judge once wrote, "...the trial itself is – or properly should be – only the culmination of a lengthy period of intensive preparatory activity on the part of the lawyers." Substitute "campaign" for trial: and "fundraisers" for "lawyers" and the situation is exactly parallel.

2) Prematureness: Although related to unpreparedness, this is a sin of commission usually caused by over-eagerness. It may take several forms: announcing the campaign or program too soon, before there has been sufficient build-up of interest and enthusiasm, and before some key gifts have been received; appointing committee chairs ahead of schedule, so that they are left in limbo for weeks or even months; disregarding the cardinal rule of sequential solicitation by moving into general solicitation too soon; and generally accelerating a schedule which presumably has been planned with care and precision. Another name for prematureness is leap-frogging, and the leapers frequently end up in the fire.

3) Radical Departure from Plan: A campaign plan is a blueprint and

guide. When done professionally, it carefully spells out all essential preparations and organizes these into a campaign timetable. In every campaign, some deviation from the plan is inevitable, but a radical departure can do serious damage and even destroy the entire operation.

4) Poor Communications: Communications opportunities abound in every capital campaign, and all too often they are overlooked or ignored. The essentiality of maintaining contact with the campaign organization is a fundamental requisite: yet, even here, there are frequent sins of omission. The campaign bulletin or newsletter, a basic tool, is the obvious solution, and a simple one, yet it is often under-utilized. There are numerous opportunities and challenges beyond this one example to tell the institutional story to constituencies and the general public. Not to take full advantage of these is to inflict a severe self-penalty.

5) Failure to Follow Through: This is the perennial sin, and the sinners are legion. Examples come all too easily to mind: assignments not carried out; major prospects not cultivated properly before solicitation – or not solicited at all; proposals for foundations or other important prospects not prepared, or not prepared on time; committees not organized or, once organized, not

served; details of the campaign plan ignored; and so on. Following through is the very essence of success in any campaign or development program, and the real test of the campaign organization is the degree to which it can carry out its basic mission.

6) Insufficient Commitment: This comes close to being the unforgiveable sin, for it implies a lack of conviction that the campaign or development program should have been undertaken in the first place. No campaign will travel very far without the undivided determination, discipline, and dedication of its leadership. Case after case has proven how indispensable commitment is to the success of a campaign.

7) Under-Confidence or Over-Confidence: It is a curious fact that too little or too much confidence can derail a campaign. The former generally derives from a sense of apprehension that "we're never going to make our goal" and the latter from an exaggerated sense of achievement after the first few big gifts have been received. Keeping a tight rein on confidence is a major responsibility of those in charge of managing the campaign or development program.

Viewed another way, or course, this negative check list can be turned into a positive one by simply substituting "virtues" for the "sins." These virtues are: Preparedness, Good Timing, Adherence to Plan, Good Communications, Follow-Through, Full Commitment, and Confidence.



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Conducting a Campaign Feasibility Study

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any wealth screening, prospect research, and analytics capabilities you have. And we learn what we can from any previous campaigns by examining documents or reports and talking to any staff who were involved and any available prior campaign leadership.

We analyze and predict which of your needs are most likely to elicit philanthropic interest from your potential donors. Then we help you develop a preliminary case for support for the campaign. We give you samples of effective case statements, and provide editing and graphic suggestions to help you craft the most persuasive case possible.

For the “external phase” we determine where the money exists and why and how potential donors may wish to invest in the goals of the campaign. We do this through confidential, personal interviews with individuals, corporations, and foundations who/which may be expected to invest or influence others to invest in your campaign. Interviewee candidate selection is a joint effort between Brakeley Briscoe and you.

We suggest categories of potential donors: grateful patients, families, friends, foundations, vendors, and medical and administrative staff, and we work with you and the Steering Committee (see below) to help you select them.

During the interview meeting – and we strongly recommend doing interviews face to face – we probe a number of issues with open-ended questions:

- What is the interviewee’s relationship with the hospital, system, or foundation?
- What is the image of the hospital, system, or foundation?
- Are the needs you have defined important to the interviewee?
- Is the preliminary case compelling and how can it be improved?
- Can the interviewee identify additional potential donors?
- Does the institution have the capacity to conduct the campaign?
- Is willing, capable, and right volunteer leadership available and what is the best way to attract it?
- Does the interviewee see a campaign role for him or her-self?
- Are there hidden concerns which will impact the campaign’s success?
- Are there other campaigns which may compete with your campaign?
- And will the interviewee him or herself be a campaign donor and at what level?

During the course of the study we maintain close contact with the client. We schedule bi-weekly check-in calls or meetings to keep everyone up to date on progress and uncover issues before they become problems. We also recommend creating a small Steering Committee of key people from the client. This committee helps us adapt our methodology to local realities and provides us feedback on the local culture.

The Steering Committee also reviews and approves the case for

support, helps select the study’s external interviewees, reviews and approves our draft report, and – with our help – presents the report to the board. This process helps assure buy-in of the campaign plan.

Once we have completed the internal assessment and the external interviews, our team of consultants – and we always use a team – meets to review our findings and agree on conclusions and recommendations. Then one of our team members writes the report with editorial help from the rest of the team.

Our report includes findings, conclusions, recommendations, a stretch goal, and a plan for how to conduct the campaign with budget, timeline, staffing pattern, and volunteer structure. (A separate document contains a list of donors we have uncovered along with possible leadership candidates.) We review the plan with the Steering Committee, and then help the Steering Committee present/sell this plan to the board and any other group which may be influential for launching the campaign.

Then we are available to help our client implement the plan.



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2014 AHP George A. Brakeley Jr. Award Winners Announced

On September 29, Brakeley Briscoe announced the winners of the George A. Brakeley, Jr.-Healthcare Philanthropy Award for writing.

Established in 1981, this award honors individuals who donate time and talent to enhance the fundraising profession by writing outstanding articles for the Association for Healthcare Philanthropy biannual journal, *Healthcare Philanthropy*. The winners are selected by the AHP Journal Advisory Council and each winner receives a plaque and recognition at the AHP annual international conference.

The 2014 winners are Bruce A. Bartoo, CFRE (Senior Vice President and Chief Philanthropy Officer of MedStar Health) and Chad M. Gobel (President of Gobel Group) for their article “Engaging physicians in transformational philanthropy”, which was printed in the fall 2014 AHP Journal.

The articles can be found on the AHP Web site at: <http://tinyurl.com/AHPHealthJournal>.

BBI in the News

Brakeley Briscoe Inc. made headlines recently with one consultant being interviewed on two separate occasions for *Fundraiser Magazin* and *The San Francisco Business Times*, and with Johannes Ruzicka, Managing Director of Brakeley GmbH, authoring an article for *Fundraiser Magazin* on Moves Management in which he discusses the importance of this process for large gift fundraising. The interview in *Fundraiser Magazin* is available at <http://tinyurl.com/BBIInterview> and the interview on capital campaigns is in the October 10 edition of *The San Francisco Business Times*.

LET'S MEET: CONFERENCES AND PRESENTATIONS

September 9, 2014-September 10, 2014

AFP and The Nonprofit Management Institute's Scaling for Social Impact; Stanford, CA. Alden Briscoe attending.

September 17, 2014-September 19, 2014

CASE Conference for Community College Advancement; Sacramento, CA. Alden Briscoe attending.

September 28, 2014-September 30, 2014

CRD 13th Annual Presidents Fundraising Academy; Newport Beach, CA. Brakeley Briscoe sponsoring. Alden Briscoe attending.

October 22, 2014-October 25, 2014

AHP Annual International Conference; Palm Desert, CA. Brakeley Briscoe exhibiting at booth 312. Marianne Briscoe, Julie Holt, and Alden Briscoe attending.

October 29, 2014

Maine Planned Giving Council; Portland, ME. Laird Yock attending.

November 4, 2014

AFP Golden Gate Chapter National Philanthropy Day; San Francisco, CA. Brakeley Briscoe sponsoring a table. Marianne Briscoe, Alden Briscoe, and Julie Ver Steeg attending.

November 21, 2014

AFP Silicon Valley Chapter National Philanthropy Day; Santa Clara, CA. Juliana Ver Steeg, Alden Briscoe, and Marianne Briscoe attending.

December 11, 2014

AFP Golden Gate Chapter and Development Executives Roundtable Holiday Party, San Francisco, CA. BBI sponsoring. Julie Ver Steeg, Alden Briscoe, and Marianne Briscoe attending.

January 25, 2015-January 27, 2015

CASE/NAIS Conference; New Orleans, LA. Marianne Briscoe and Alden Briscoe attending.

February 18, 2015- February 20, 2015

CASE International Alumni Relations Conference; New York, NY. Brakeley Briscoe attending.

March 29, 2015-March 31, 2015

AFP 52nd International Conference on Fundraising; Baltimore, MD. Marianne Briscoe and Alden Briscoe attending.

April 14, 2015-April 17, 2015

CASE Asia-Pacific Advancement Conference; Singapore. Marianne Briscoe, Young Woo Choi, and Lanchesca Lee attending.