



Capital Campaigns

Laying a purposeful foundation

hello

Sarah J. Malchow, CFRE
 Chief Administrative Officer of Cedar Community
 Credentialed Certified Fund Raising Executive (CFRE)
 Bachelor's Political Science and Public Administration
 Certifications from the Indiana University Lilly School of Philanthropy

2019 Recipient of Award for Donor Stewardship and Engagement
 2021 Recipient Professional Fundraiser Award - AFP SEW

Leads key revenue divisions including philanthropy, marketing, sales, and independent living.
 20+ years of non-profit leadership and fund development experience
 Most recently established donor-directed endowed scholarship fund

hello

Nicole Pretre
serves as the President and Chief Executive Officer of Cedar Community and is a Credentialed Professional Gerontologist through the National Association of Gerontologists. She holds a Bachelor of Arts degree in Journalism and Communications from the University of Wisconsin-Madison, a Master of Science degree in Gerontology and Management of Aging Services from the University of Massachusetts-Boston, and a Certificate in Fundraising Management from the Indiana University Lilly School of Philanthropy. Nicole serves on the board of directors for LeadingAge Wisconsin, and she is a steering committee member of Milwaukee Women inc. and the Ziegler Link Age Funds. She was named to the 2021 US News CEO Advisory Council for Senior Living. An Emmy award-winning journalist, Nicole was honored as the 2020 CMO of the year by the Milwaukee Business Journal.

Before the shovel hits dirt...

Laying a solid plan and foundation for your capital campaign is just as important as your architectural design.



1. Dig into deep into the data
2. Craft your case and campaign scope and ask for the gift of feedback.
3. Purposefully plan for success - people, plan, prepare, and process.

1. FEASIBILITY STUDY

Do I really need one?



YES. YES YOU DO.

Four things...



MAJOR DONORS

Assess your current major donor population and pipeline

- Donor pyramid - historical performance annual and campaign
- Donor pipeline - new potential major donor relationships



CAPACITY & PLAN

Assess your fundraising capacity and preliminary campaign plans

- Donor pyramid - historical
- Lay out a preliminary plan
 - operational
 - capital
 - debt reduction
 - program
- Fundraising readiness - operations, online, staff, marketing, board participation...

WE INTERRUPT THIS FEASIBILITY STUDY DISCUSSION FOR A BRIEF MESSAGE ON THE MESSAGING.

2. MAKING THE CASE.

Telling the story: three parts



write donors
into your
history



“Cedar Community was founded more than 70 years ago with one man’s gift, one founder’s tireless vision, and thousands of volunteer hours and donor dollars. Today, with your help, this benevolent mission is still our NorthStar. You make it possible to support our friends and neighbors who outlive their resources and can no longer afford the cost of their care. Thank you for this kindness.”

articulate the
problem:
it is bigger than
all of us



*Social isolation is killing us.
Literally.*

*Older adults who live alone suffer higher rates of:
High blood pressure
Heart disease
Anxiety and depression
Dementia - including Alzheimer's*

*This could be you, your parents or grandparents, your
highschool basketball coach, your best friend.
It could be anyone.*

identify the
solution:
the problem is
relatable and
solvable



*You can help us meet the growing need for housing
and supportive care services for Washington County's
middle and low income older adults.*

*Your support of Cedar Community's Campaign for
Care will allow us to expand affordable housing
options for our friends and neighbors.*

*Your gift today will help us care for your loved ones -
tomorrow.*

BREAK IT DOWN

by the numbers

BACK TO OUR REGULARLY SCHEDULED FEASIBILITY STUDY PROGRAMMING...



STAKEHOLDER INTERVIEWS AND CASE TESTING

- What do your donors think?
- About the problem
 - About the solution/plan
 - About the leadership
 - About the goal
 - About their ability and willingness to help




ANALYSIS

- Consider everything you've learned
- The good
 - The bad
 - The ugly
 - The surprising
 - The reaction to your case message
 - Is it feasible?
 - If yes - create donor map to goal

ADJUST.


3. MAKE THE PLAN
WORK THE PLAN
THE PLAN WORKS

Discipline and focus are the
foundation of success



PEOPLE. PLAN. PREPARE. PROCESS.

Purposeful planning will support your
campaign success.



PEOPLE

You've talked to your lead people. Now what?

Revisit top donors and BOD to:

- recap results of study
- advise of early plans
- solidify pledge amounts
- ask for endorsements and referrals

Establish a campaign team to support with:

- peer to peer asks
- campaign events
- campaign tasks

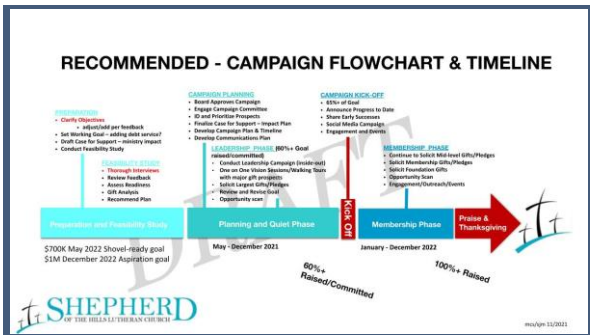
PLAN

*Ok. Ink on paper for timelines, major milestones, tasks.
Your purposeful roadmap to success.*

Leadership on board for:

- specific target dates
- specific action items
- specific asks
- accountability

Everybody owns this.



PREPARE
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Singing from the same hymnbook.

Communications

- draft appeals, case language, goals, project approvals, thank you-s, and social media/push marketing and messaging approved
- coordinating leadership messaging - articles, presentations, releases, groundbreaking and events

PROCESS

Purposeful preparing for the day to day.

| | |
|--|---|
| <p>Communications</p> <ul style="list-style-type: none"> • campaign theme finals • case for support finals • any direct mail • thank you letter • schemas, draft designs | <p>Operations</p> <ul style="list-style-type: none"> • website • online giving • gift and pledge processing • leadership engagement • vendor engagement |
|--|---|

**IF YOU ONLY
REMEMBER
THREE THINGS**

Before the shovel hits dirt...

A solid plan and purposeful foundation for your capital campaign is just as important as your architectural design.



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2. Craft your case and campaign scope and ask for the gift of feedback.
3. Purposefully plan for success - people, plan, prepare, and process.



GET IN TOUCH WITH ME



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