

Creating a Twelve-Week Major Gifts Campaign



This activity takes a good idea—“Let’s do a major gifts campaign!”—and translates it into specific tasks and deadlines. By doing this exercise, your participants will better understand the scope of the campaign and how the pieces fit together. It’s also a great opportunity for problem solving and team building.

There’s nothing magical about twelve weeks; some organizations can complete these tasks in six, eight, or ten weeks. (We know of one organization that shuts down the office and completes most of this work in two weeks.) Regardless, this is an exercise for creating a time-limited, focused campaign rather than a major donor program that continues throughout the year. Both models have strengths and weaknesses, and each organization needs to decide on the best approach given its needs, opportunities, and organizational culture.

Why Do This Exercise?

Without a calendar, a plan is not a plan

Use This Exercise When

You are planning your major gift campaign

Time Required

30 minutes for the exercise, plus 60 minutes in advance to prepare the materials

Audience

The leadership team for your fundraising campaign: some combination of board, staff, and volunteers. This exercise can be done with as few as three

participants and as many as a dozen.

Setting

A room with 10 to 15 feet of blank wall space and enough room for participants to move around in front of the wall. You’ll be putting Post-It notes on the wall, so you need a surface that will hold these sticky notes.

Materials

- Two packs of large (8 inches by 6 inches) Post-It notes
- Markers (non-toxic)
- You may want a camera to record the finished calendar

PREPARATION

1. Using markers, write Week 1, Week 2, all the way to Week 12 on twelve Post-It notes or “cards.” These serve as your calendar for the exercise. Write large enough that people can read the cards from several feet away.
2. Prepare Post-Its listing the following tasks in a major gifts campaign. Note that some tasks can take place several times during the campaign and therefore require several cards.
 - Identify campaign leadership
 - Set campaign dollar goal
 - Prepare gift chart
 - Identify challenge gift
 - Identify prospectors to suggest names
 - Identify prospects
 - “Rate prospects” for dollar amount
 - Test and modify goal: enough prospects?
 - Identify askers
 - Test and modify goal: enough askers?
 - Assign prospects
 - Train askers
 - Create campaign calendar
 - Prepare campaign materials
 - Create lines of accountability
 - Prepare letters to prospects
 - Send letters (make three of these Post-Its)
 - Phone prospects to schedule (three of these)
 - Meet with prospects (three of these)
 - Follow-up calls to undecided prospects (two of these)
 - Check-in meeting with leadership and askers (two of these)
 - Thank donors (two of these)
 - Wrap-up meeting to evaluate campaign
 - Identify leadership for next campaign
 - Celebration
 - Four blank Post-It notes

FACILITATING THE EXERCISE

1. Place calendar cards (Week 1 through Week 12) in a horizontal line across the wall. Put them high, as the team will be placing tasks cards below.
2. Off to the side, place the task cards on the wall in random order. Be sure to shuffle them well.
3. Invite everyone to step up and begin placing the cards on what they consider appropriate spots on the calendar. Encourage them to ignore a card if they decide the task isn't needed, or add other steps by writing on the blank Post-It notes.
4. Once the cards are placed, ask everyone to stand back and look at the entire calendar and continue to move the pieces as needed.
5. Reconvene the group and debrief the exercise using the following questions:
 - This campaign includes a lot of specific steps. Does this level of detail make you feel empowered or overwhelmed? Why? Give people a chance to discuss, making note of how many fall into each camp. If a large majority feels overwhelmed, you may have to simplify the campaign and reduce the number of steps.
 - Do you believe this campaign model would work for us? Why or why not? How do we adapt it to make it work?
 - What's our next step?

Note: In most fundraising campaigns, the two most significant limiting factors are the number of prospects and the number of askers who will engage these prospects. The cards marked "Test and modify goal: enough prospects?" and "Test and modify goal: enough askers?" are sometimes misunderstood, but the intention is simple enough: to ensure that you have critical mass in both of these areas before proceeding. Here's a hint: place these two cards fairly early on your calendar so you will know, early on, if your goal is realistic.

6. Once you've reached consensus on the calendar, record your work. A camera is the handiest way to do this. Should you choose to go forward with a campaign, the photo will serve as your campaign calendar.

There is no single correct solution to completing this exercise. If you need guidance, see page 95 for a sample campaign calendar.

TRAINING TIP As everyone works together (or not) to build the calendar, pay attention to the process. Some will jump in and start moving cards around; others will stand back and watch. Some will ask for help or suggestions; others will work alone. How people work during this exercise can teach you a lot about the way your group will work together once the actual campaign begins. One of the functions of a facilitator is to help bring meaning to these exercises. During the debriefing, describe what you've seen—name it gently and respectfully, but name it.

