
So, You're Launching a Capital Campaign... Now What?

SEPTEMBER 26, 2025



PRESENTER

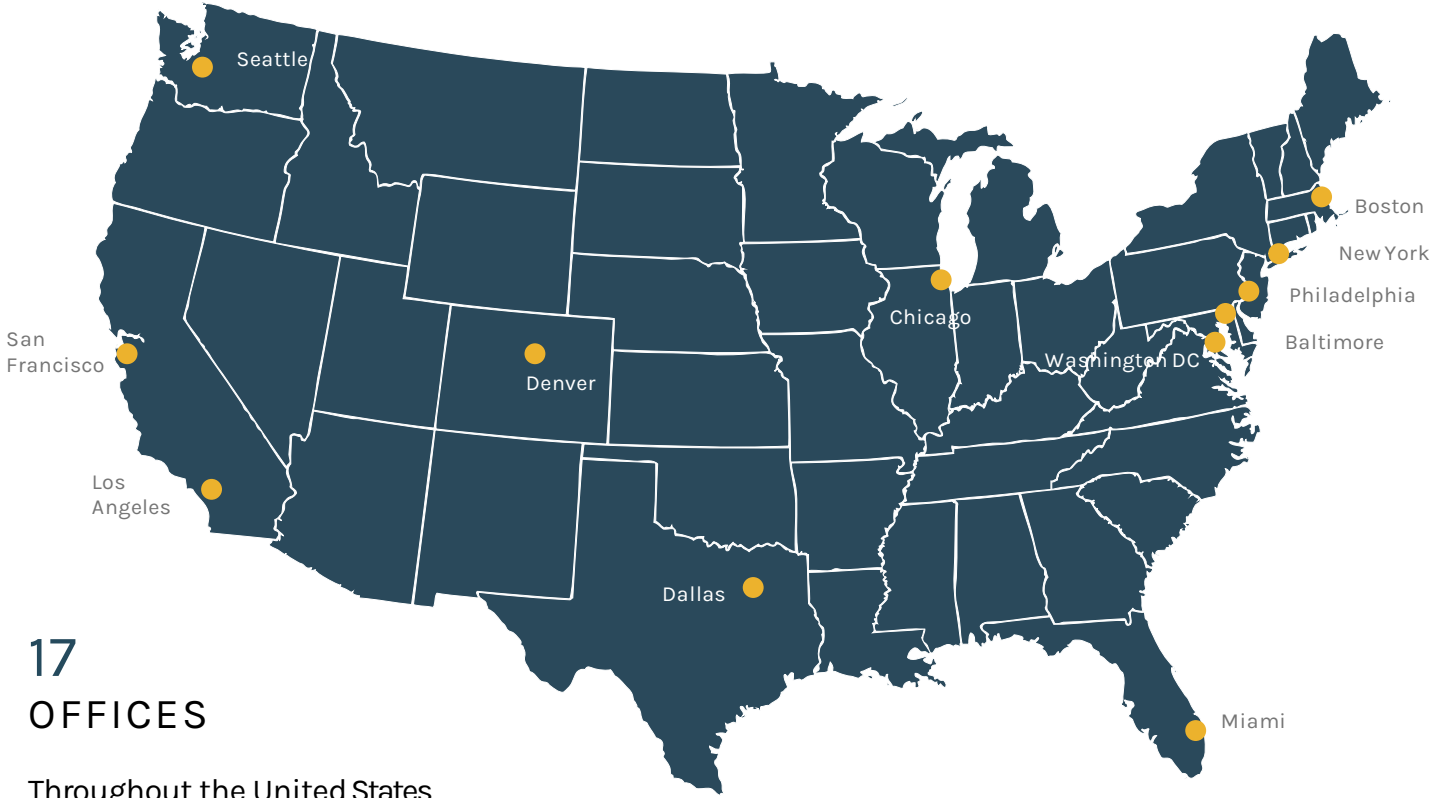


KURT MCKINLEY

Executive Vice President

CCS Fundraising

ABOUT CCS FUNDRAISING



17
OFFICES

Throughout the United States and across the globe.

78

YEARS OF SERVICE

Founded in 1947, CCS has become the most widely recommended firm in the field.

620+

PROFESSIONAL STAFF

CCS has the largest staff of fundraising professionals among leading firms.

95%

REPEAT OR REFERRALS

Ninety-five percent of our business comes from repeat business or referrals.

7

CORE SERVICES

- Campaign Studies/Management
- Major Gift Initiatives
- Audits & Assessments
- Development Projects
- Research and Data Analytics
- Interim Management
- Custom Learning

CLIENT PARTNERSHIPS

SELECT CATHOLIC CLIENTS

 <p>THE ROMAN CATHOLIC ARCHDIOCESE OF ATLANTA</p>	 <p>ARCHDIOCESE of BALTIMORE</p>	 <p>The Roman Catholic Archdiocese of <i>Washington</i></p>
<p>CATHOLIC CHARITIES</p> <p>CHERISHING THE DIVINE WITHIN ALL</p>	 <p>Catholic Charities ARCHDIOCESE OF WASHINGTON</p>	 <p>ROMAN CATHOLIC DIocese OF CHARLESTON</p>
 <p>CATHOLIC DIOCESE OF PITTSBURGH</p>	 <p>JVC JESUIT VOLUNTEER CORPS</p>	 <p>ORDER OF MALTA® FEDERAL ASSOCIATION, U.S.A.</p>
 <p>OUR LADY OF MERCY</p>	 <p>S A S J</p>	 <p>ST. MARY'S SEMINARY & UNIVERSITY 1791</p>

SELECT CATHOLIC INDEPENDENT SCHOOL CLIENTS

 <p>ST. JOHN'S COLLEGE HIGH SCHOOL Est. 1851</p>	 <p>BENEDICTINE COLLEGE PREPARATORY</p>	 <p>CALVERT HALL</p>
 <p>DonBoscoCristoRey A High School of the Archdiocese of Washington</p>	 <p>SCHOLA PREPARATORIA GEORGIOPOLITANA MDCCCLXXXIX</p>	 <p>GEORGETOWN VISITATION PREPARATORY SCHOOL 1799 FIDES ET SCIENTIA</p>
 <p>Loyola Blakefield</p>	 <p>MOUNT SAINT JOSEPH</p>	 <p>Notre Dame <i>Prep</i> ESTABLISHED 1873</p>
 <p>ROYAL PALM ACADEMY LIVE LEARN LEAD SEMPER ALTIUS</p>	 <p>ST. ANSELM'S ABBAY SCHOOL</p>	 <p>ST. JOSEPH'S PREPARATORY SCHOOL EST. 1851</p>

CCS SOUTH FLORIDA PARTNERSHIPS



WORKSHOP OVERVIEW

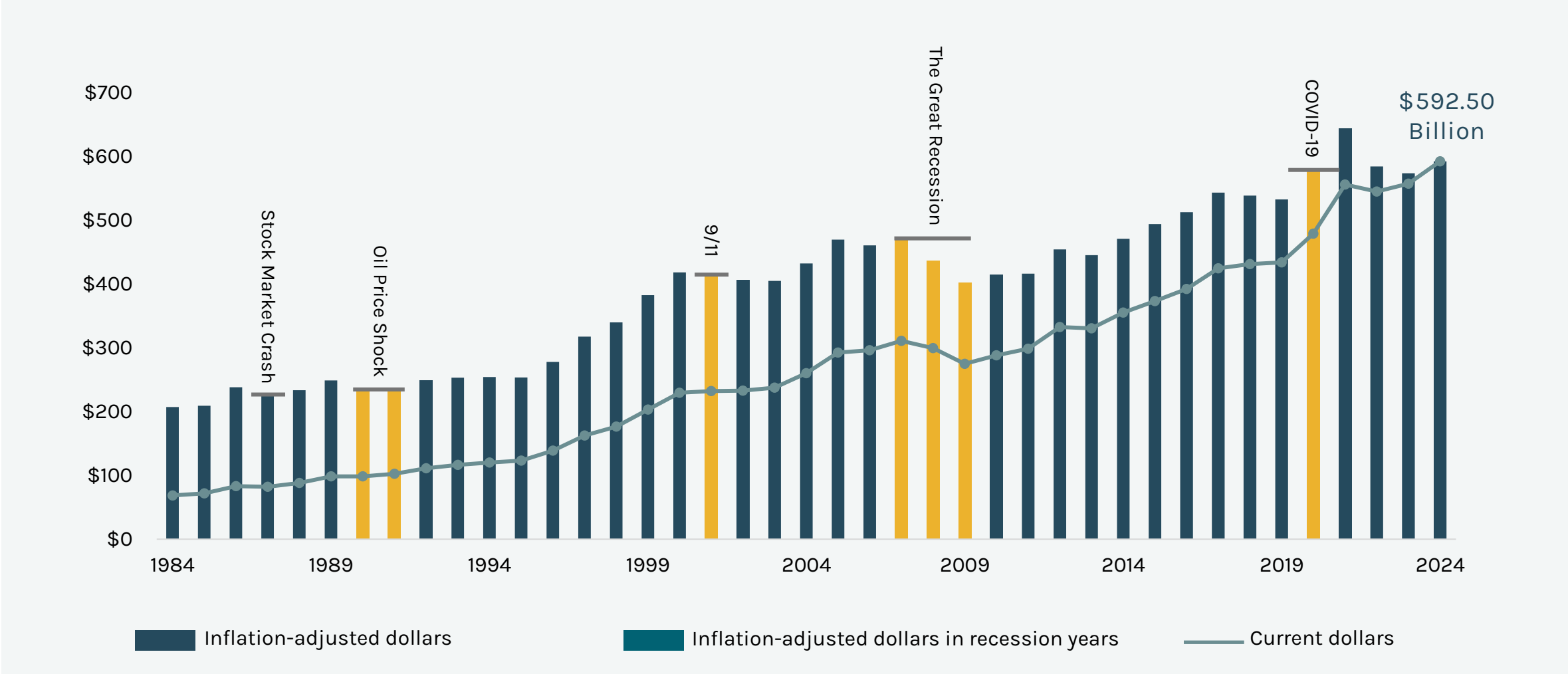
- 01 Fundraising Trends
- 02 Elements of Campaign Readiness
- 03 Campaign Readiness Activities





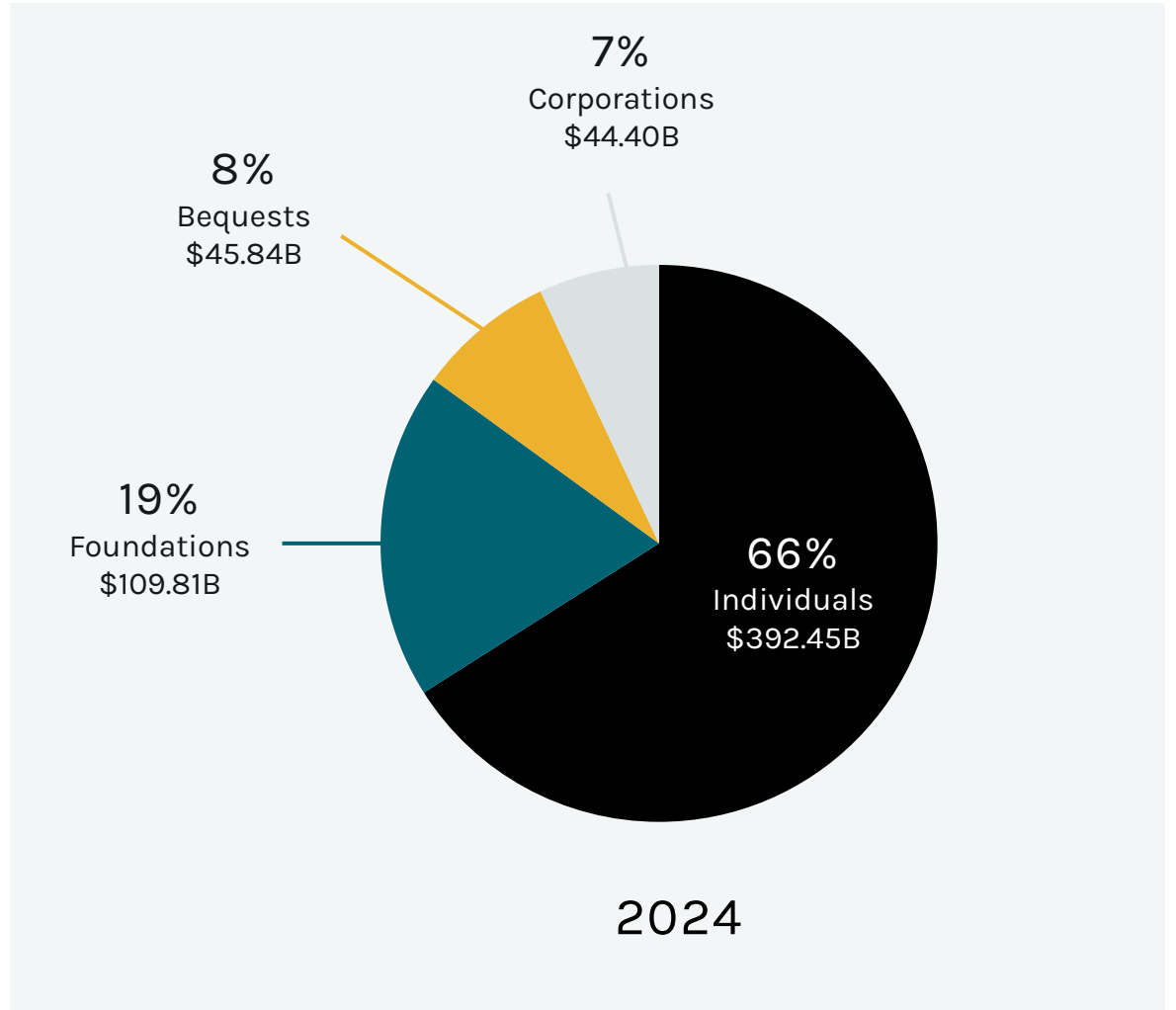
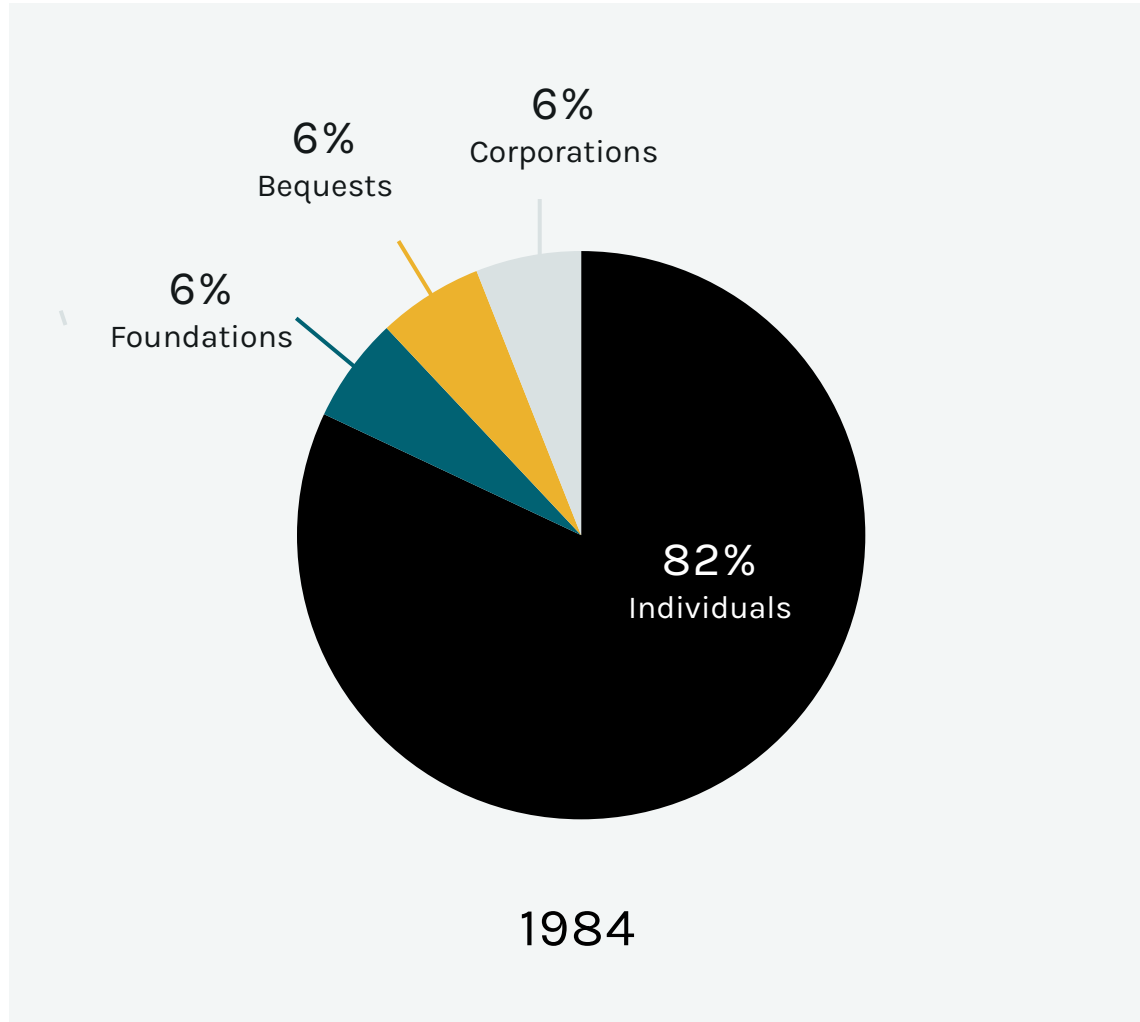
GIVING TRENDS

Charitable giving remained strong in 2024, reaching \$592.50B



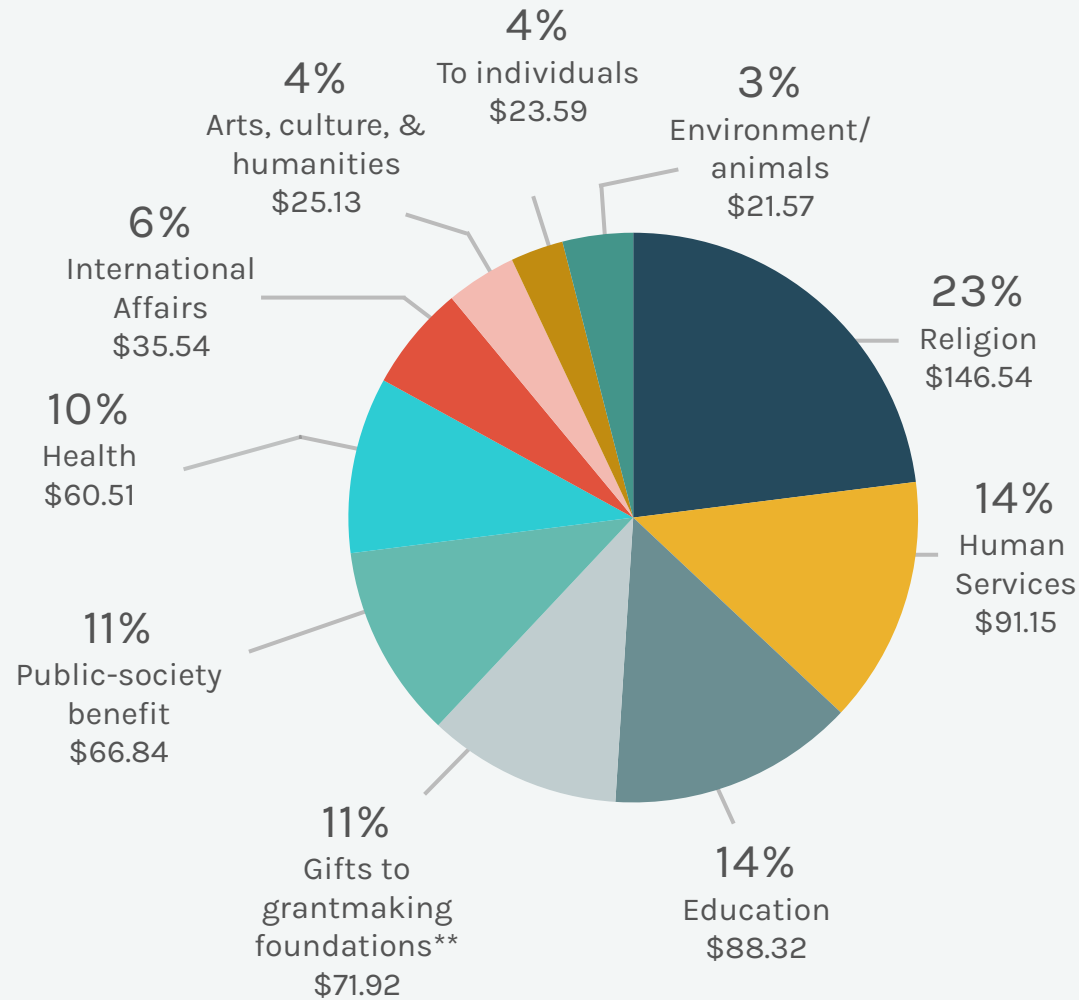
Individual Donors Continue to Drive Giving

(IN BILLIONS OF DOLLARS | ALL FIGURES ARE ROUNDED)



2024 Total Giving by Recipient Type*

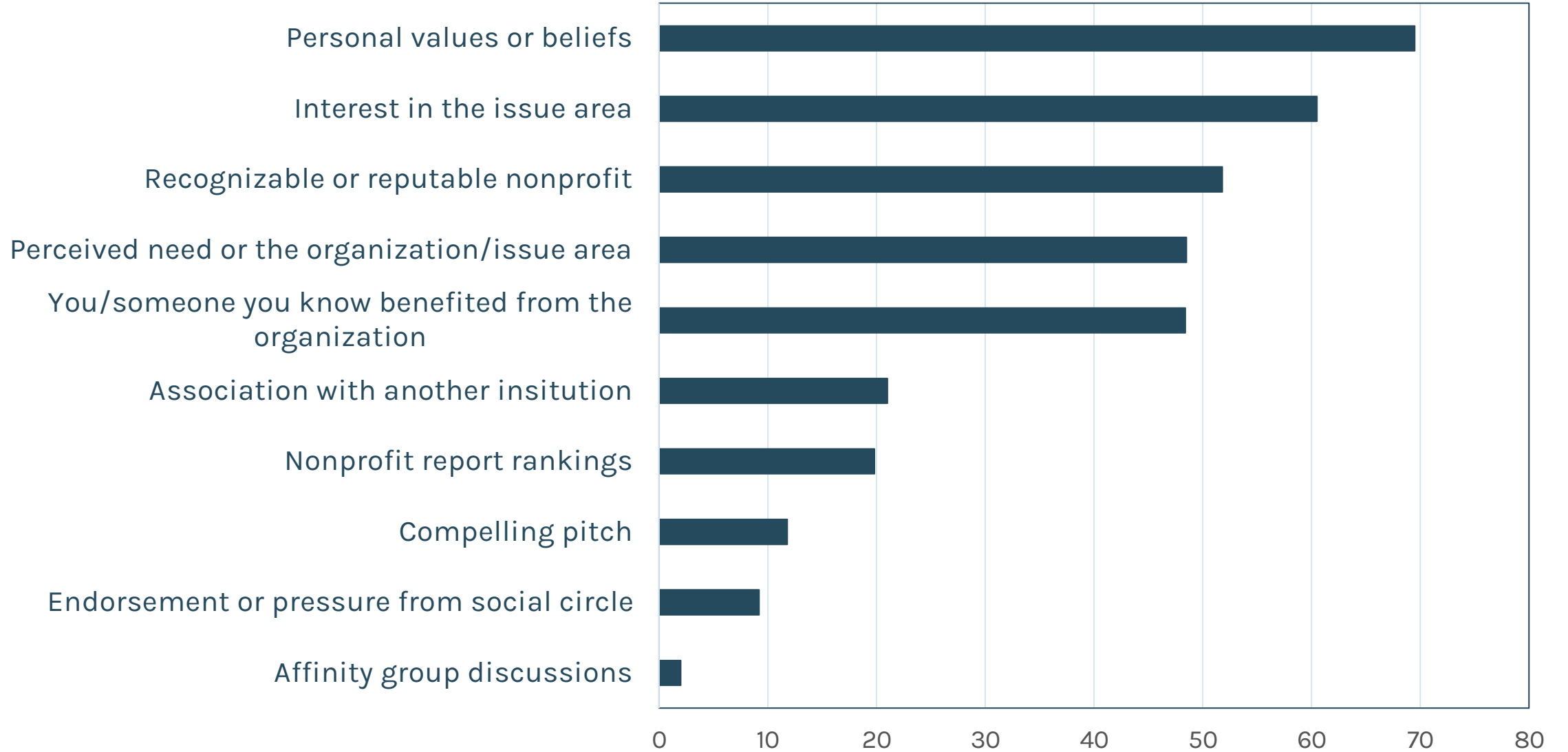
(IN BILLIONS OF DOLLARS | ALL FIGURES ARE ROUNDED)



*Total includes unallocated giving, defined as the difference between giving by source and recipient categories. Unallocated giving totaled -\$38.60 billion in 2024.

**Estimates developed by the Indiana University Lilly Family School of Philanthropy using data provided by Candid.

HNWIs Reasons for Giving*



*Bank of America, Giving with Purpose: How affluent households contributed in 2022

Why Do People Stop Giving?

Organizational shortcomings; appearing ineffective or straying from mission

Not seeing the direct impact of their philanthropy

Not staying connected

Too high a frequency of gift requests

Inability to match the best visitor(s) with the prospect

Not including the spouse/partner in the request

Failure to conduct timely follow-up

Failure to conduct prospect research

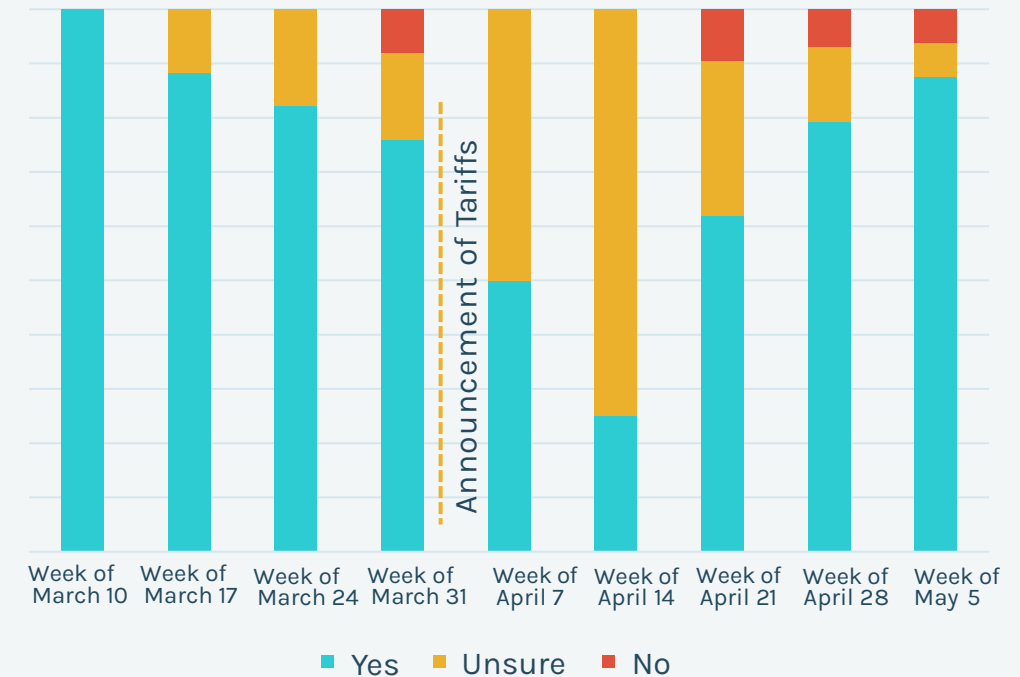
Programs that lack visibility

How Are Donors Responding?

CCS OBSERVATIONS:

- Individual and corporate donors are taking longer to make decisions on large gift requests.
- Emergency appeals are successful when the narrative is genuine, and the beneficiary is viewed as being in jeopardy of services.
- Funding initiatives to “fill the gap” are not gaining traction with donors.
- In challenging times, donors look to nonprofits as steady leaders and vital community resources – donors want to know what is happening.

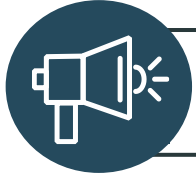
Is now the right time to advance a campaign?



Key Principles In Navigating Change



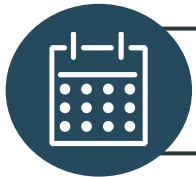
Turbulent times create greater competition.



Increase communication with your donors.



Reaffirm your mission and impact.



Avoid wholesale cancellation of plans.



Be sensitive to the donor's situation.



Stay the course.



WHAT IS A CAMPAIGN?

An intensive fundraising effort designed to raise a specific amount of money within a defined period of time to meet the varied needs of an organization.

TYPES OF CAMPAIGNS

COMPREHENSIVE

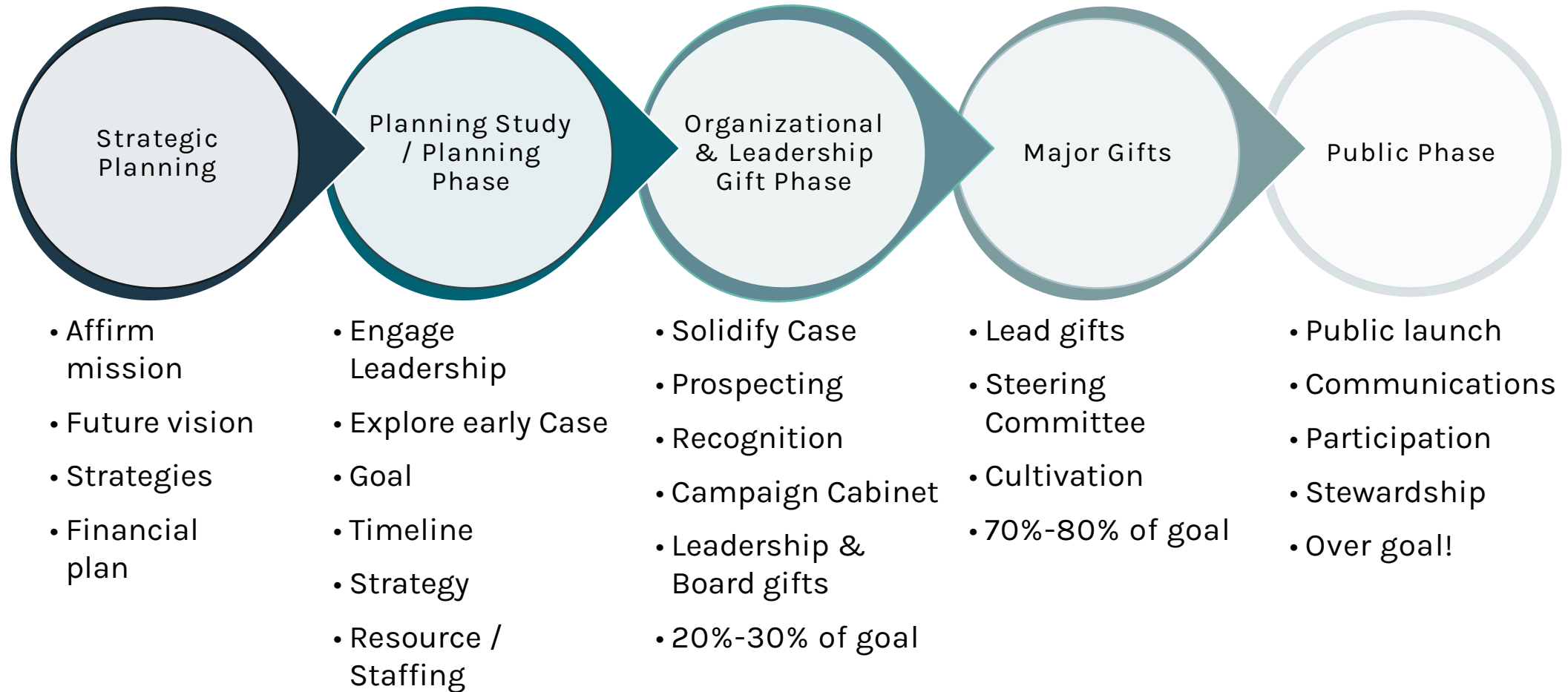
- Counts all gifts and pledges
- Inspirational Case to expand and sustain mission
- Broad and overarching
- Seek one, best, multi-year commitment from each donor that likely includes annual giving
- Longer (3 - 5 years or more)
- Donors typically solicited one time

STANDALONE

- Counts only capital (as an example) pledges
- Extraordinary one-time investment in a capital project or program
- Targeted projects
- Seeks multi-year campaign commitments above and beyond annual giving
- Faster (12 months - 24 months)

ARC OF A SUCCESSFUL CAMPAIGN

Comprehensive Campaigns



ESSENTIAL CAMPAIGN ELEMENTS



CASE

A compelling, donor-centric narrative describing philanthropic need based on organizational priorities



PROSPECTS

Individuals, foundations, and corporations with philanthropic capacity and alignment to give



LEADERS

Representatives from your Board, donors, and volunteers will engage prospective donors and lead the campaign



PLAN

A step-by-step outline for achieving your fundraising goal



CAMPAIGN READINESS ACTIVITIES

DETERMINING CAMPAIGN READINESS



CASE

- Is your case fully developed?
- Was the case developed collaboratively?
- What level of detail is available?
- Do you know specific costs?



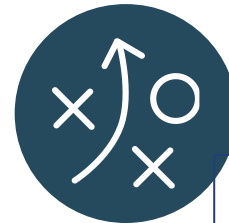
LEADERSHIP

- How active is your board?
- Do you have 100% board giving?
- How engaged are your leaders?
- How will the campaign be resourced?



PROSPECTS

- How does your annual fund perform?
- What is the participation rate?
- How many gifts do you receive annually?
- How many prospects do you have?



PLAN

- When will funding need to be in place?
- Are there any factors impacting timing?
- What has been your experience with past campaigns?

DETERMINING CAMPAIGN READINESS

A study seeks advice and feedback from key stakeholders on:

- 1 Organizational Readiness
- 2 Leadership and Top Prospects
- 3 Case Elements
- 4 Financial Goal
- 5 Timing



KEY PIECES OF CAMPAIGN PLANNING

Financial Goal

Case for
Support

Engaging
Prospects

Timeline

Campaign
Organization

Roles and
Responsibilities

Campaign
Budget

Campaign Plan

FINANCIAL GOAL

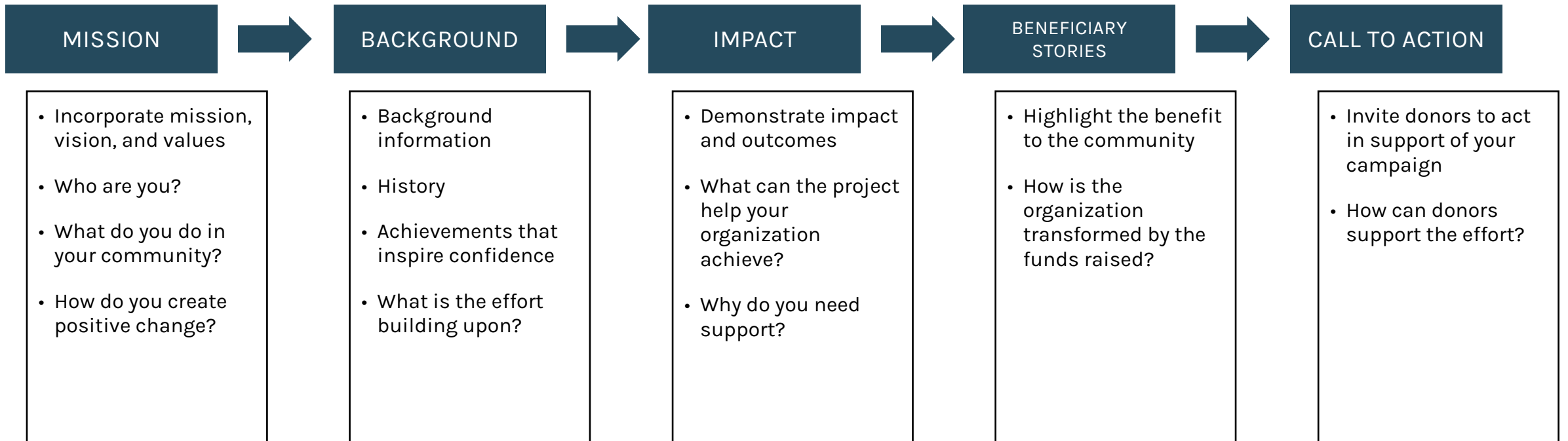
Core Goal Setting Considerations:

- Rooted in need, but not based on need alone
- Test it during the Study
- Must be attainable
- Tested against a Table of Gifts
- NOT a mathematical equation

TABLE OF GIFTS FOR \$10 MILLION				
Gift Level	# Gifts	Prospect Needed	Gift Level Total	Cumulative Total
\$2,500,000	1	4	\$2,500,000	\$2,500,000
\$1,000,000	2	8	\$2,000,000	\$4,500,000
\$500,000	4	12	\$2,000,000	\$6,500,000
\$250,000	6	24	\$1,500,000	\$8,000,000
\$100,000	8	36	\$800,000	\$8,800,000
\$50,000	10	40	\$500,000	\$9,300,000
\$25,000	15	50	\$375,000	\$9,675,000
<\$25,000	Many	Many	\$325,000	\$10,000,000
Total	47+	174+		\$10,000,000

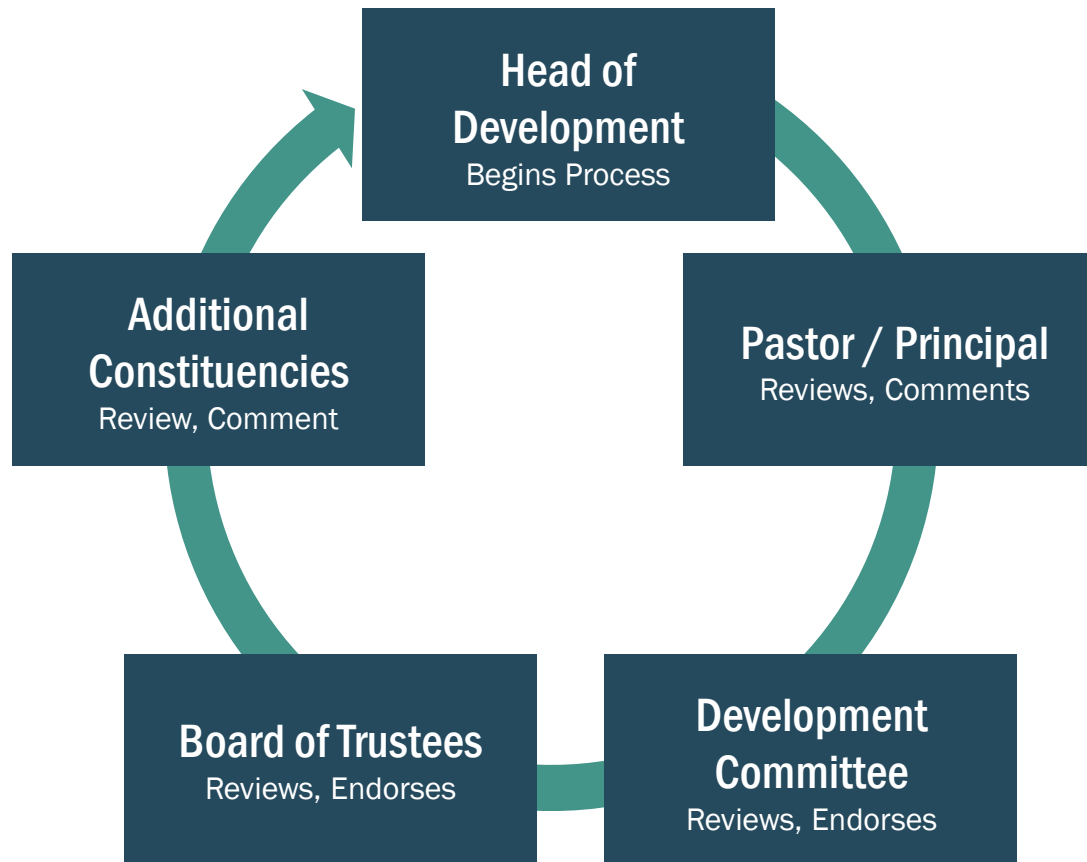
CAMPAIGN ELEMENT: CASE FOR SUPPORT

- 01 Develop a compelling theme that embodies your organization's priorities.
- 02 Test and refine your case with donor feedback.
- 03 Personalize your message based on constituent affiliation and donor behaviors.



CASE FOR SUPPORT

GETTING PERSPECTIVE AND BUY-IN



CORE ELEMENTS

Executive Summary

Mission and Vision

Background and History

Current Situation/Need

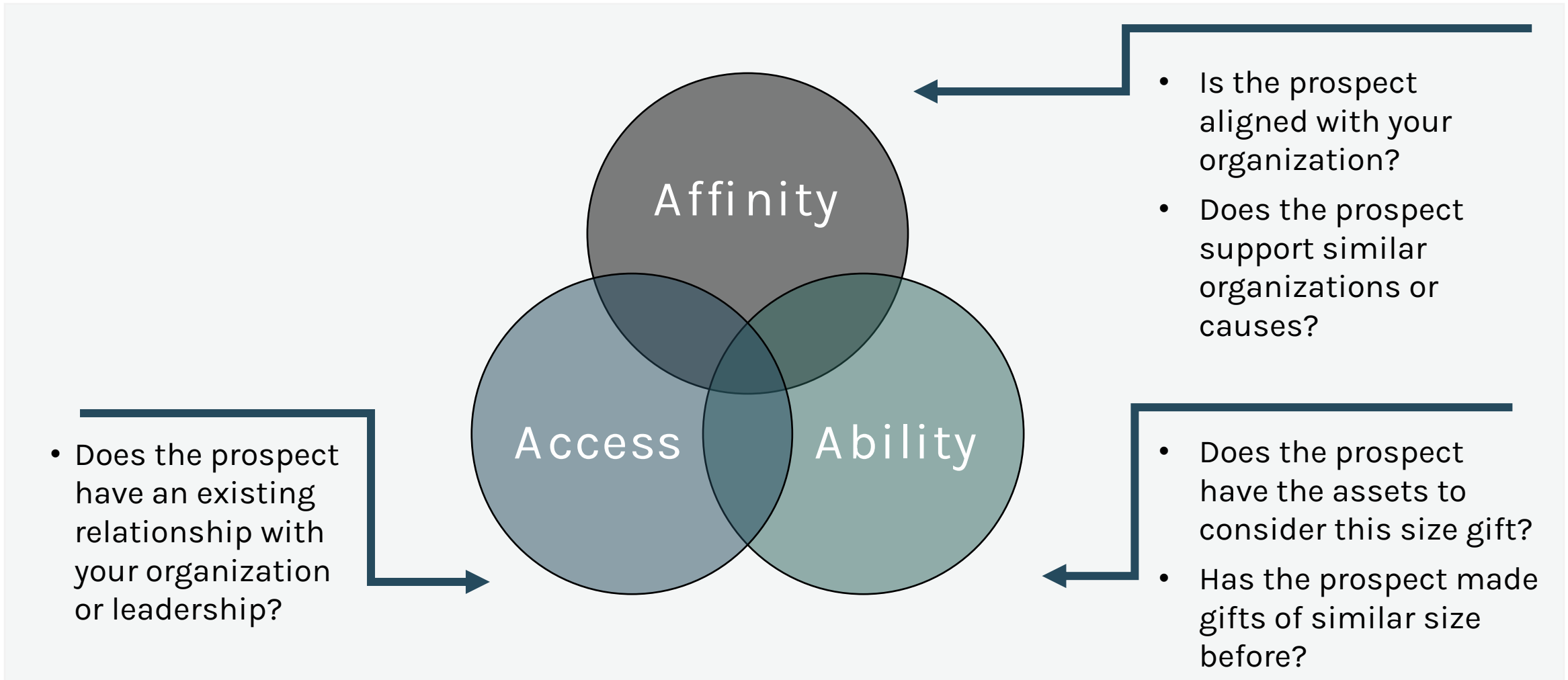
Challenge

Preliminary Cost Estimates

Plan to Meet Needs/Use Funds

CAMPAIGN ELEMENT: PROSPECTS

Prospecting is the process of identifying potential new donors. Guiding principles include:



CAMPAIGN ELEMENT: PROSPECTS

Build individual donor engagement strategy by answering the following questions:

- 1 **Gift Target:** what gift amount and for what area/program are we asking?
- 2 **Solicitor(s):** who is making the ask?
- 3 **Timing:** when will the ask take place?
- 4 **Materials:** what materials are needed to be successful?
- 5 **What's Next:** What is the stewardship and recognition plan?

TIMELINE

What factors influence the timeline?

Construction
schedule

Organizational
calendar

Imminence of
need

Organization
milestones

Other
concerns

The Arc of a Successful Campaign:

Campaign
Planning

Campaign
Organization

Leadership Gift
Phase

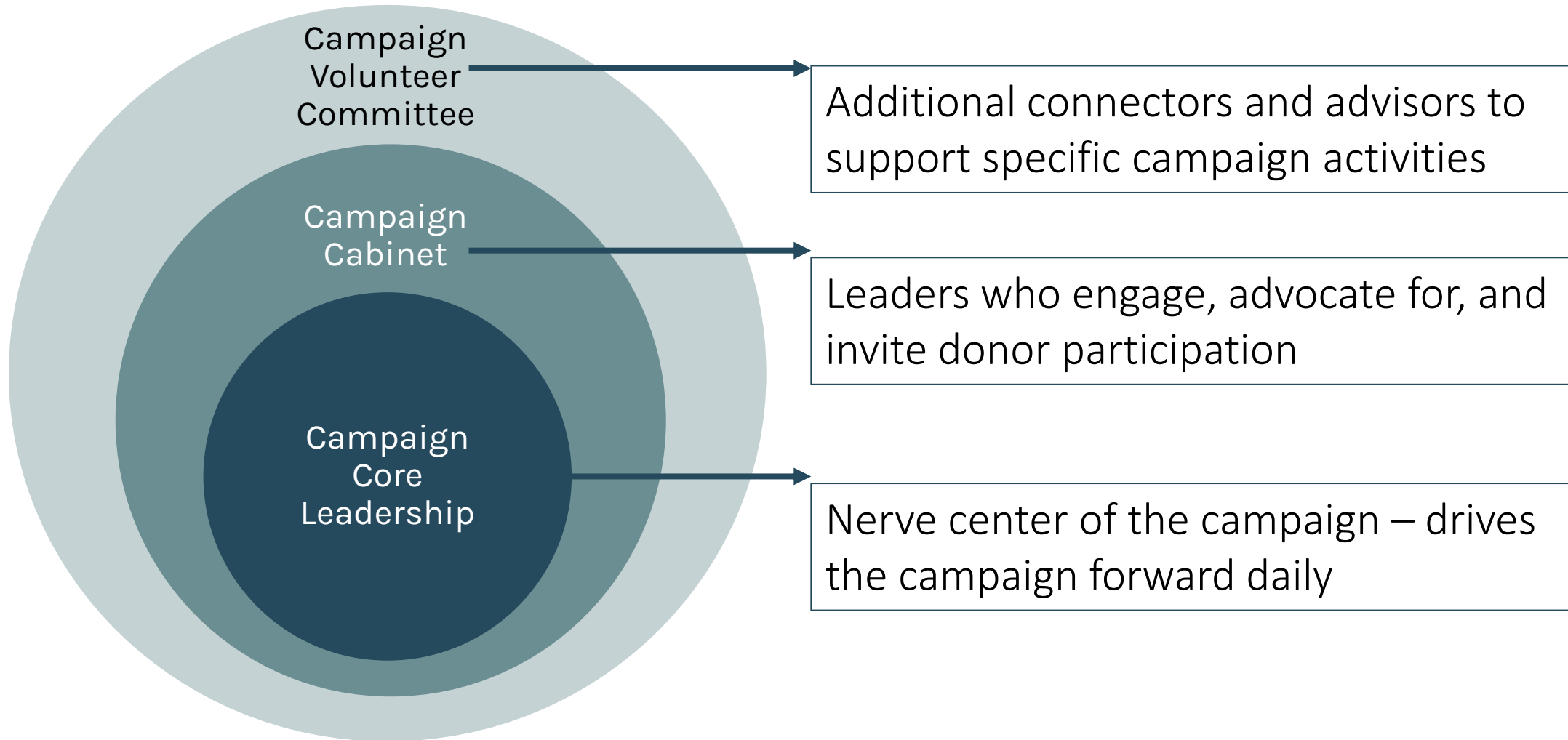
Major Gift /
Constituency
Phases

Public Phase

Celebration and
Stewardship



CAMPAIGN ORGANIZATION



RESPONSIBILITIES



STAFF & COUNSEL

- Drive and manage daily activity
- Provide strategy
- Research and prepare materials
- Brief volunteers
- Motivate and provide confidence



LEADERSHIP & BOARD

- Lead the effort
- Collaborate on the campaign plan
- Engage potential donors
- Open doors
- Participate



VOLUNTEER LEADERSHIP

- Identify prospects
- Open doors
- Request gifts
- Share their passion
- Provide buy-in credibility
- Make a gift

CAMPAIGN BUDGET CONSIDERATIONS

Lilly Family School of Philanthropy

15% - 35% for nonprofit fundraising costs across all sectors

BBB Wise Giving Alliance

<35% of contributions including donations, legacies, & other gifts

Charity Navigator

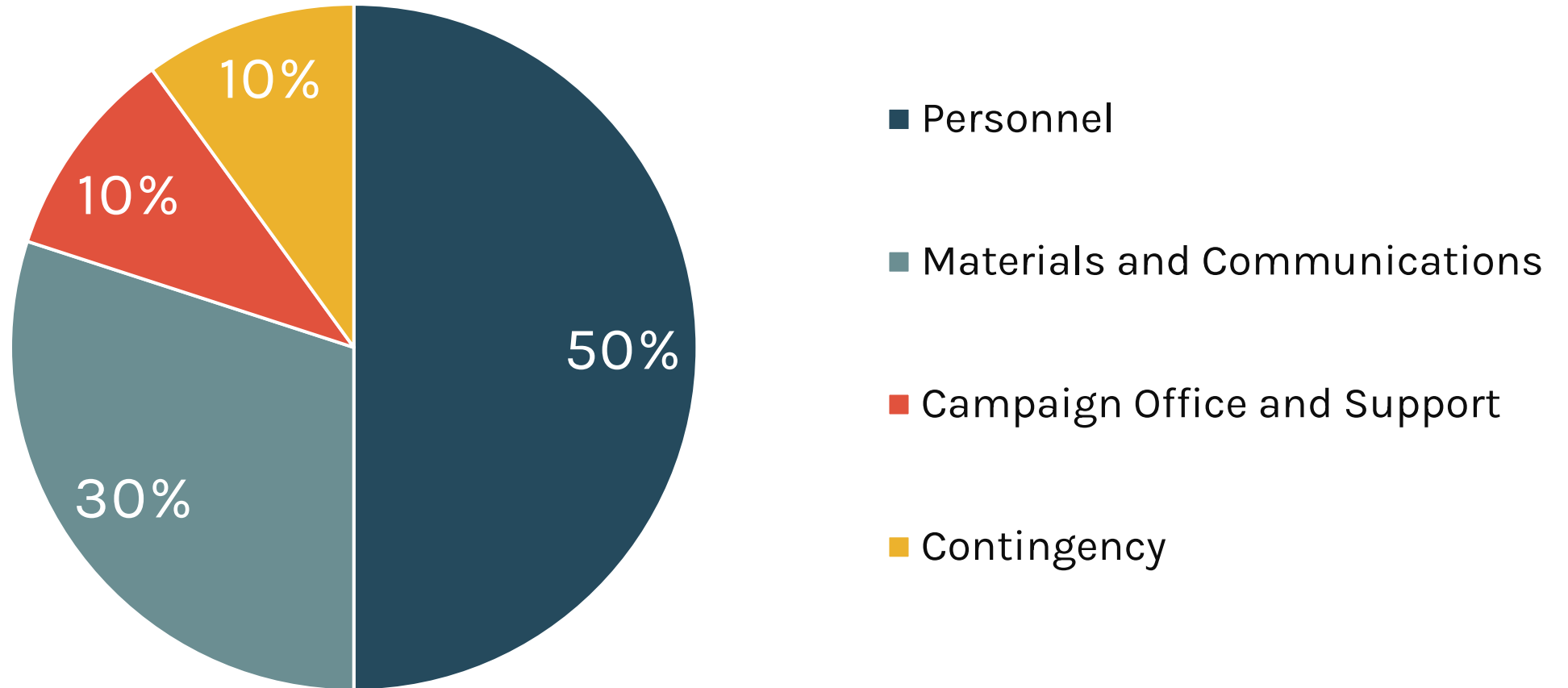
<\$0.20 per dollar raised

CharityWatch

Spend <\$25 to raise \$100

CAMPAIGN BUDGET BREAKDOWN

A Campaign requires investment to be successful. Typical budget amounts vary.



CAMPAIGN ELEMENT: PLAN

Goal setting considerations:



Comprehensive or standalone?



About the need, but not the need alone



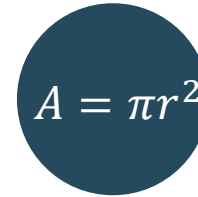
Requires Analysis



Challenging yet achievable



Not dependent on one lead gift or a handful of gift indications



Not a mathematic equation

CAMPAIGN PLAN

- Overall campaign strategy and methodology
- Blueprint for campaign activity
- Rooted in results of planning study
- Demonstrates strategic thinking / organization
- Builds confidence
- Basis for solicitation strategies

Goals

Leadership /
Volunteers

Case Elements

Campaign
OrganizationDonor
AudiencesTimetable /
PhasesMajor Gifts
StrategyCampaign
PoliciesDonor
RecognitionActivity
Benchmarks

Communications

Special Events

TIPS TO PREPARE FOR A SUCCESSFUL CAMPAIGN

1

Leverage a feasibility study to collect data and inform planning

2

Understand all you can about your donors

3

Engage campaign / volunteer leadership early and often

4

Focus on what you can control and move forward

5

Maintain positivity

THINGS TO REMEMBER

- 1 It takes time and resources - so - start early
- 2 A study can help you understand your campaign readiness
- 3 Consider how everything ties into your strategic plan
- 4 Don't operate in a silo - generate buy-in





DISCUSSION

Thank You

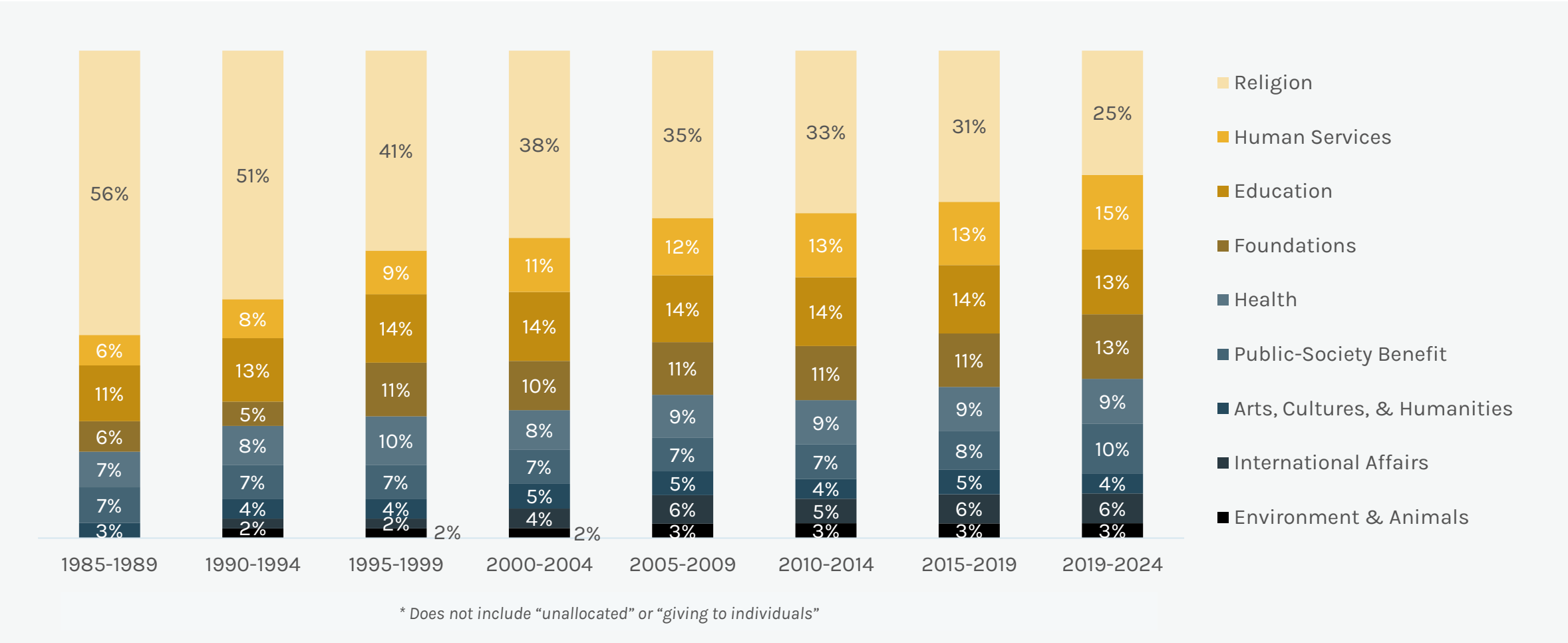


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GIVING BY RECIPIENT TYPE

Percentage of the total in five-year spans, 1985-2024*

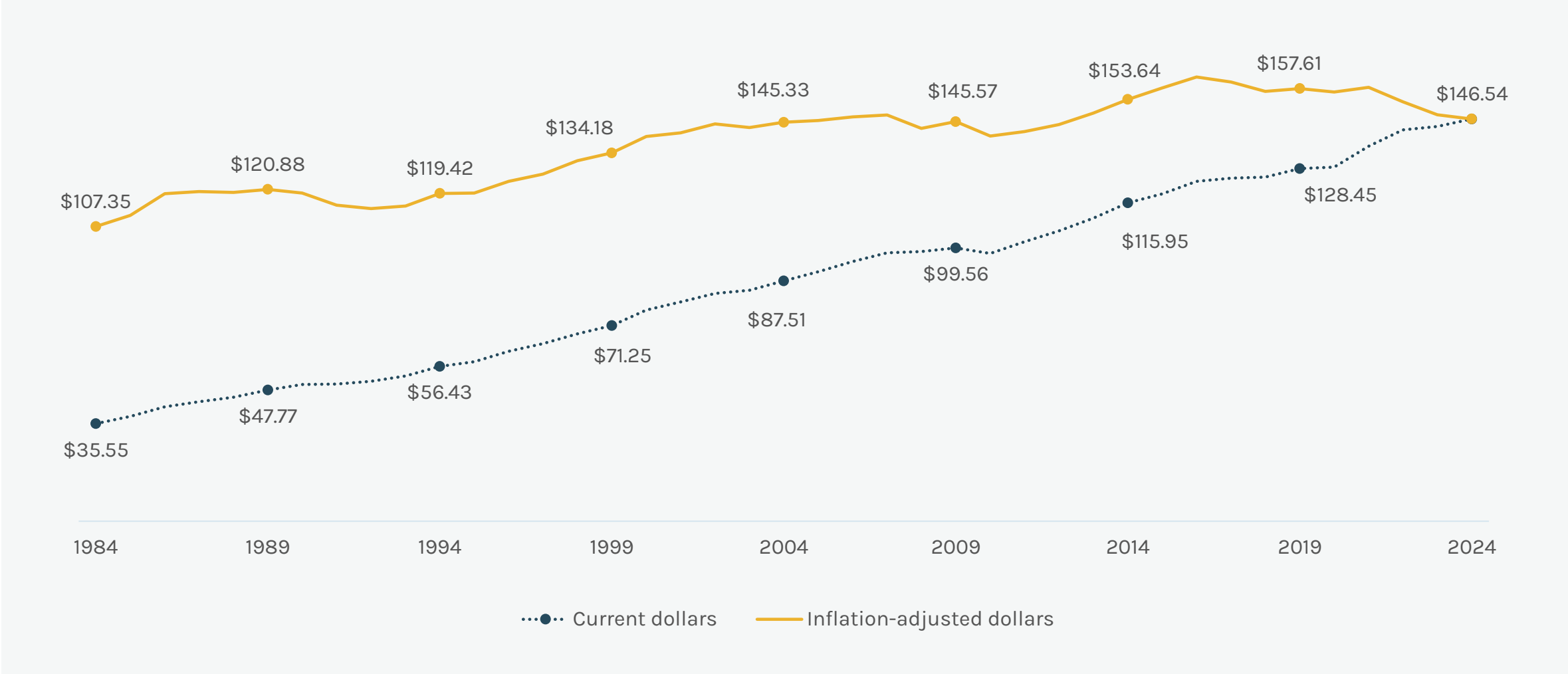
(ADJUSTED FOR INFLATION, 2024=\$100)



* Does not include "unallocated" or "giving to individuals"

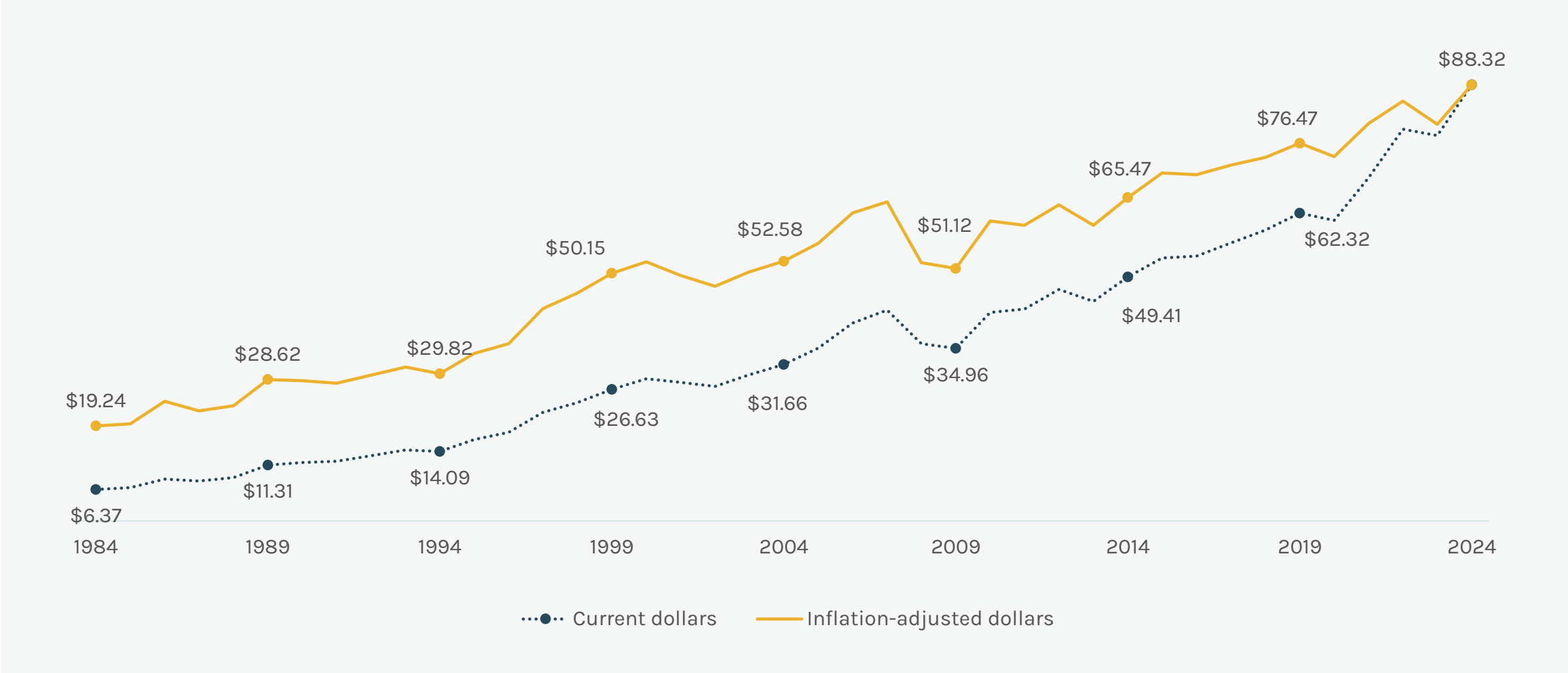
GIVING TO RELIGION, 1984-2024

(IN BILLIONS OF DOLLARS)



GIVING TO EDUCATION, 1984-2024

(IN BILLIONS OF DOLLARS)



CAMPAIGN ELEMENT: PROSPECTS

Sample Donor Strategy Builder				
	Discovery	Cultivate	Brief	Ask
Action to be taken				
The meeting setup				
Who will be involved				
Materials to be developed				
Follow-up plan				
Completion date				