



**McDonaldSchaefer**

*Fund Development Advisors to Nonprofits*

Madison | Milwaukee

## Proposal for Capital Campaign Management Services

Prepared for

**Waunakee Public Library**

January 2015

Dear Susan,

This is the 2<sup>nd</sup> of two related proposals. The first is the Feasibility Study proposal. In the interest of reducing redundancy and unnecessary reading, I note that firm background, staff bios and client references are not included again in this proposal; they are fully presented in our Feasibility Study proposal.

Additionally, without a completed feasibility study to provide critical insight into what your campaign experience will be like, it is difficult to know how much of our services will be needed and how long a campaign might take. We respectfully reserve the right to update information in this proposal for campaign management services based on results of the feasibility study.

Sincerely,

*Dave Malone*

David Malone  
Managing Principal

## Capital Campaign Management Services

McDonald Schaefer will develop a detailed plan and serve as Campaign Directors, overseeing the effective implementation of the plan and ensuring continuing campaign progress. As Campaign Directors, we work in partnership with your organization's staff and volunteer leadership, providing a comprehensive offering of campaign products and supplying key support services.

To use an analogy, we are something like the football quarterback on the field, calling the plays and managing the game. Another apt analogy is that of the symphony conductor, seeing the entire musical score before us and setting the tempo for the performance, queuing the right musicians at the right time and keeping everyone moving together in harmony. In each of these analogies, successful outcomes depend on a team of people working together toward common goals and objectives; the same is true of capital campaigns.

Your campaign will generally follow this sequence:



We develop the comprehensive, detailed campaign plan by starting with proven major gift strategies and then personalizing the plan to your unique challenges and circumstances. Then we oversee the plan's implementation throughout the campaign.

As Campaign Directors, McDonald Schaefer will:

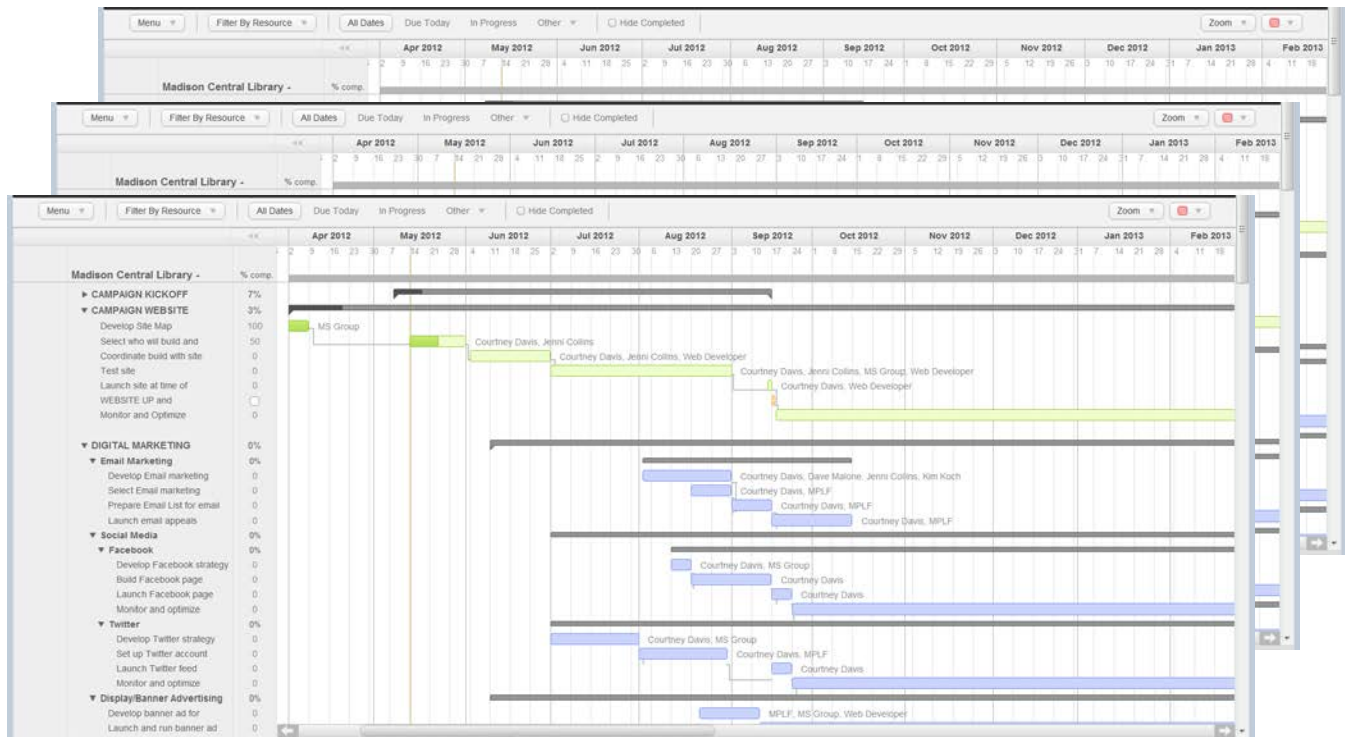
- Work directly with staff to manage internal campaign objectives.
- Meet regularly with board and campaign cabinet members individually to support their work cultivating prospects, soliciting gifts and stewarding donors.
- Write and produce a substantial amount of campaign communications pieces, letters, grant proposals, website, video, progress reports and more.
- Integrate prospect research into outreach strategies to ensure our cabinet is equipped with the right information and to ensure maximum outcomes for gifts.
- Track all campaign movement in our custom database that produces management reports used daily to advance hundreds of campaign moves simultaneously.
- Develop report formats and frequencies for keeping key team members (staff, board, cabinet) apprised of progress and regularly produce and distribute such reports. These include: campaign progress reports for the board, cabinet and staff; eNewsletters; and Campaign Flash emails sent periodically to announce important developments such as when major gifts are received or major campaign benchmarks are achieved.
- Plan and manage various special events related to the campaign such as key cultivation events, the public campaign kickoff and groundbreaking ceremonies.

## Innovative Campaign Management

Over years of directing successful capital campaigns, we have developed a proprietary and comprehensive campaign management system called TABS<sup>®</sup>, for Task Assurance Benchmarking System. TABS<sup>®</sup> integrates several innovative tools we have designed for effective campaign management.

### *Campaign Planning*

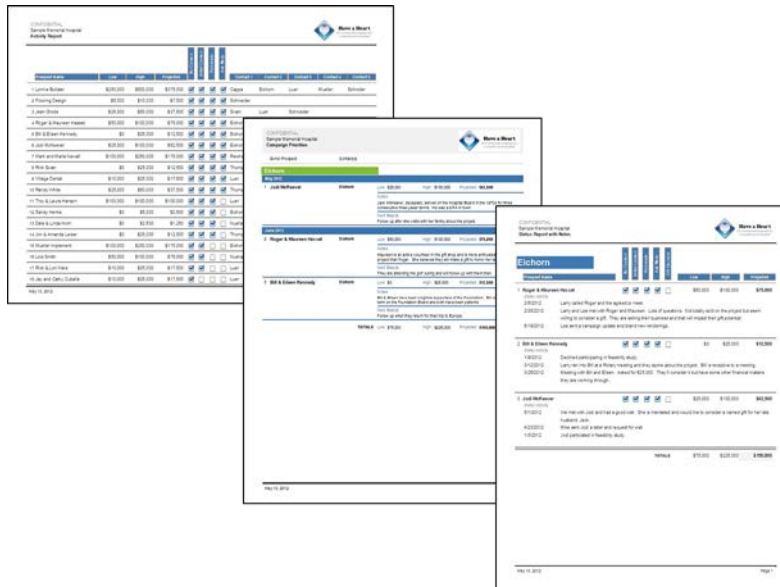
During the key planning phase, TABS<sup>®</sup> ensures that each important campaign variable and the many moving parts of a capital campaign are working together to achieve the best result. Integrated into project management software, TABS<sup>®</sup> maps the entire campaign plan and schedule and regularly compares actual campaign progress to established performance benchmarks.



Small sample of TABS<sup>®</sup>

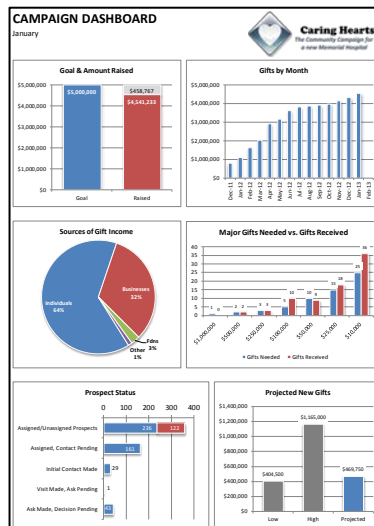
## Campaign Management

An important component of TABS<sup>®</sup> is our campaign management database that tracks and manages a substantial amount of donor data and produces key management reports, which are vital to volunteer involvement and donor engagement.



## Campaign Performance

The TABS<sup>®</sup> Campaign Dashboard provides your leadership team with a simple visual presentation of the major metrics of the campaign. This one-page summary of key variables gives a snapshot of the campaign status.



While capital campaign results cannot be guaranteed because of the variables outside of your control and ours, we will apply TABS<sup>®</sup> to your campaign, adapt it to your unique circumstances, calibrate it to your desired timeframe, and then apply the system's full potential to reach mutually determined benchmarks that keep the campaign on track, the staff and volunteers on task, and give you the best probability for success.

## Scope of Services

McDonald Schaefer will develop a campaign plan that focuses on fundamental priorities. Having planned, tested, and managed several multi-million dollar capital campaigns, we know well the five fundamentals common to successful campaigns:

1. Communications (including an inspiring case for support)
2. Bold leadership
3. Committed major donors
4. Capable campaign office
5. Solid campaign plan

We are equipped to provide virtually all of the needed services required for a capital campaign, and we are commonly asked to do so. To afford our clients the best match for their needs, we offer three levels of service as detailed in the Scope of Services in Appendix A.

**Please see Appendix A to review service and fee options.**

## Fees

The overall expense of fundraising for a major capital campaign commonly runs in the range of 5% to 15% of the campaign goal, including fees for professional campaign management and other campaign related expenses such as brochures, direct mail, campaign website, special events, etc. Costs as a percent of the goal tend to be higher for campaigns with smaller goals (e.g. goals in the range of \$1 million to \$2 million), and lower for campaigns with larger goals (e.g. goals of \$3 million or more).

Fees for professional fundraising services are among several fees for projects of this nature such as architectural fees, engineering fees, contractor fees, banking fees, legal fees, realtor fees, etc. It's common to add the cost of fundraising to the campaign goal as a legitimate project cost.

**Please see Appendix A to review service and fee options.**

Services and Fees can be fixed over the entire campaign timeline, or they can be expedited should accelerated progress on your project be desired. With Expedited Services, we devote more concentrated time and resources to the front of the campaign, advancing both campaign planning and campaign progress more quickly. The organization does not pay more in total when choosing this option, rather it means services and corresponding fees are weighted more to the early stages of the campaign, and less to the later stages.

If the campaign goal should be met ahead of schedule, the agreement for campaign management services will conclude early and no further fees will be required other than for the month of termination. If it should take longer to meet the campaign goal than anticipated, McDonald Schaefer's involvement may be extended under new terms agreed upon by both parties at that time. Either party may terminate the agreement without cause with 30 days written notice.

These fees are a good-faith estimate of the work that will be required for your campaign; we believe they are accurate and reliable. However, if significantly less or significantly more time is needed to help

you achieve your goals, due to circumstances unknown to us now or that may develop during the course of our working relationship, we will notify you an adjustment may be needed and will discuss a mutually agreeable fee adjustment.

### Additional Expenses

Travel fees can be a costly and common expense in working with consulting firms. Since we operate locally, we do not charge travel expenses for meetings at your organization or nearby. If long distance travel is required for the campaign, such as to visit a distant donor prospect or campaign cabinet member more than 60 miles outside of Waunakee, reimbursable expenses may include mileage, airfare, lodging, car rental and meals. Such expenses are subject to your approval.

As part of our services, McDonald Schaefer will provide basic wealth analysis on major gift prospects. McDonald Schaefer can provide comprehensive research dossiers for additional prospects, at your request, for \$75 per hour (the average prospect requires two to three hours of research and analysis).

McDonald Schaefer develops the copy for various communications pieces identified in the Scope of Services. Graphics development, which is the next step, may either be provided by your selected graphic artist or McDonald Schaefer can provide graphic arts services at the rate of \$100 per hour.

Additional expenses that may apply are those unrelated to our management services such as website development, video development, printing, direct mail processing, special events, etc.

## Appendix A




### CAPITAL CAMPAIGN

#### Scope of Services Options for Wauankee Public Library

This **Scope of Services** table summarizes the major steps in planning and running a capital campaign and outlines the standard division of tasks between McDonald Schaefer and our clients based on the Option selected. The Options are flexible to allow you to tailor our services to your particular needs and we may jointly elect to move some of the tasks from one column to another.




Note that this list *summarizes* broad topics and clients should cautiously consider the "right" option for them as many of these steps involve dozens of related substeps and require extensive experience, time, and resources.

*WPL = Waunakee Public Library*

SCOPE OF SERVICES		Option 1 \$10,400/mo.		Option 2 \$7,800/mo.		Option 3 \$5,200/mo.	
Task		 MS	WPL	 MS	WPL	 MS	WPL
<b>CAMPAIGN LEADERSHIP</b>							
1	Define the role of volunteer campaign leadership	✓	✓	✓	✓	✓	✓
2	Develop job descriptions for all leadership positions	✓		✓		✓	
3	Develop leadership profile	✓		✓		✓	
4	Define Cabinet hierarchy	✓		✓		✓	
5	Identify leadership candidates	✓	✓	✓	✓	✓ <sup>-</sup>	✓ <sup>+</sup>
6	Research (internal/external) leadership candidates	✓		✓			✓ <sup>*</sup>
7	Evaluate leadership candidates	✓	✓	✓	✓	✓	✓
8	Prioritize list of candidates	✓	✓	✓	✓	✓	✓
9	Develop personal recruitment strategies	✓	✓	✓	✓	✓	✓
10	Develop recruitment materials/tools	✓		✓			✓ <sup>*</sup>
11	Recruit Honorary Chair(s), Working Chair(s), regular cabinet members	✓	✓	✓	✓	✓ <sup>-</sup>	✓ <sup>+</sup>
12	Develop cabinet orientation and training materials	✓		✓		✓ <sup>-</sup>	✓ <sup>+</sup>
13	Conduct Relationship Mapping exercise to link cabinet members and donor prospects	✓		✓		✓	
14	Provide group cabinet orientation and solicitation training for board, campaign cabinet and staff	✓		✓		✓	
15	Provide one-on-one follow up training sessions after group session	✓		✓			✓ <sup>*</sup>
16	Meet regularly with board and campaign cabinet members individually to support their work cultivating prospects, soliciting gifts and stewarding donors	✓		✓		✓	✓
17	Frequently update leadership team on campaign status and progress	✓		✓			✓ <sup>*</sup>

\* McDonald Schaefer to provide guidance and/or samples.

+/- A plus sign indicates primary responsibility; a minus sign indicates secondary responsibility

SCOPE OF SERVICES		Option 1 \$10,400/mo.		Option 2 \$7,800/mo.		Option 3 \$5,200/mo.	
Task		 MS	WPL	 MS	WPL	 MS	WPL
18	<b>MAJOR DONOR DEVELOPMENT</b>						
19	Develop gift chart	✓		✓		✓	
20	Segment prospect list into tiers and recommend different cultivation and solicitation strategies	✓		✓		✓	
21	Compile initial prospect list based on the organization's contacts, feasibility study results, and leads from new sources	✓	✓	✓	✓		✓*
22	Produce comprehensive prospect research dossiers on top prospects	✓		✓		✓	
23	Conduct wealth screening and analytics for up to 2,500 prospects	✓		✓		✓	
24	Conduct rating sessions with leadership team to evaluate donor prospects	✓		✓		✓	✓
25	Develop Schedule of Asks by qualifying and prioritizing prospects based on projected gift, ask readiness and personal connections to prospect	✓	✓	✓	✓	✓	✓
26	Assign major prospects to members of the leadership team	✓	✓	✓	✓	✓	✓
27	Develop personalized cultivation & solicitation strategies for lead gift prospects	✓	✓	✓	✓	✓	✓
28	Develop personalized cultivation & solicitation strategies for other major gift prospects for duration of campaign	✓	✓	✓	✓	✓	✓
29	Lead the active solicitation stage and serve as the driving force by coordinating cultivation and solicitation strategies with leadership team throughout the campaign and serving as primary contact for campaign cabinet	✓		✓		✓	✓
30	Accompany volunteers on selected solicitation calls when necessary	✓	✓	✓	✓	✓-	✓+

\* McDonald Schaefer to provide guidance and/or samples.

+/- A plus sign indicates primary responsibility; a minus sign indicates secondary responsibility

SCOPE OF SERVICES		Option 1 \$10,400/mo.		Option 2 \$7,800/mo.		Option 3 \$5,200/mo.	
Task		 MS	WPL	 MS	WPL	 MS	WPL
31 <b>COMMUNICATIONS</b>							
32 Develop campaign theme and tagline		✓	✓	✓	✓		✓*
33 Write copy for case statement (large brochure), small brochure and rack card style brochure		✓	✓	✓	✓		✓*
34 Coordinate with graphics talent to develop campaign stationery set (letterhead, envelopes, note cards, folders)		✓		✓			✓*
35 Develop gift/pledge form		✓		✓			✓*
36 Define Giving Levels		✓		✓			✓*
37 Recommend/Develop Named Gift Opportunities		✓	✓	✓	✓	✓	✓
38 Define on-site recognition program		✓	✓	✓	✓		✓*
39 Develop campaign newsletter concept		✓		✓			✓*
40 Develop digital campaign strategy and multimedia digital concept:							
41 Develop campaign website concept		✓		✓		✓~	✓+
42 Develop campaign eNewsletter concept		✓		✓		✓~	✓+
43 Develop campaign video concept		✓		✓		✓~	✓+
44 Develop social media tools concepts		✓		✓		✓~	✓+
45 Develop press network strategy		✓		✓	✓		✓*
46 Develop on-site signage strategy		✓		✓	✓		✓*
47 Develop other assorted campaign promotional materials		✓		✓	✓		✓*
48 Develop comprehensive direct mail strategy		✓		✓	✓	✓~	✓+
49 Develop a PowerPoint presentation for various publicity opportunities		✓		✓			✓*
50 Prepare press kits		✓		✓			✓*
51 Write a master foundation inquiry		✓		✓		✓	
52 Write a master foundation proposal		✓		✓		✓	
53 On-going grant writing proposals (not including government grants)		✓		✓	✓		✓*
54 Prepare numerous campaign-related documents (letters, proposals, follow ups, etc.), ready for signature, for various volunteers and staff		✓		✓	✓	✓~	✓+
55 Plan special events (campaign kickoff, groundbreaking event, grand opening), promotions and public outreach		✓	✓	✓	✓		✓*
56 Write special event scripting		✓		✓	✓		✓*
57 Develop concepts for special event graphics (programs, easel displays, PowerPoint)		✓		✓			✓*
58 Develop stewardship communication strategies		✓		✓	✓		✓*

\* McDonald Schaefer to provide guidance and/or samples.

+/- A plus sign indicates primary responsibility; a minus sign indicates secondary responsibility

SCOPE OF SERVICES		Option 1 \$10,400/mo.		Option 2 \$7,800/mo.		Option 3 \$5,200/mo.	
Task		 MS	WPL	 MS	WPL	 MS	WPL
59	<b>CAMPAIGN OFFICE</b>						
60	Develop comprehensive campaign plan	✓		✓		✓	
61	Update or develop Gift Acceptance policy	✓		✓	✓		✓*
62	Update or develop Deferred Gift policy	✓		✓	✓		✓*
63	Update or develop Named Gift policy	✓		✓	✓		✓*
64	Confirm or develop Stock Transfer Instruction Sheet	✓		✓			✓*
65	Develop tiered gift acknowledgement plan	✓		✓	✓		✓*
66	Develop pledge reminder system	✓		✓	✓		✓*
67	Develop named gift system tracking system	✓		✓			✓*
68	Schedule recurring group and one-on-one meetings with cabinet members	✓		✓	✓		✓*
69	Coordinate direct mailing campaign with mail house	✓		✓	✓		✓*
70	Prepare documents for campaign meetings including agendas, timelines, gift reports, forecasts, etc.	✓		✓	✓		✓*
71	Develop personalized proposals for individual donors when needed	✓		✓	✓		✓*
72	Track all prospect data and moves management in campaign database	✓		✓		✓	
73	Conduct ongoing standard prospect research	✓		✓	✓		✓*
74	Provide grant research	✓		✓		✓	
75	Store and manage inventory of campaign promotional materials		✓		✓		✓
76	Routinely assemble campaign materials into campaign folders, ready for use by campaign volunteers		✓		✓		✓
77	Coordinate campaign special events (cultivation events/receptions, public campaign announcement, groundbreaking, campaign celebration)		✓*		✓*		✓*
78	Manage production of campaign newsletter and/or other identified communication tools		✓*		✓*		✓*
79	Record gifts, acknowledge donors, notify involved solicitors		✓		✓		✓
80	Track campaign pledges, issue reminders when due		✓		✓		✓
81	Maintain campaign website, social media channels and other digital applications		✓		✓		✓

\* McDonald Schaefer to provide guidance and/or samples.

+/- A plus sign indicates primary responsibility; a minus sign indicates secondary responsibility