

# **CATHOLIC DEVELOPMENT + QUARTERLY +**

An informational DIGEST to guide development personnel in the emerging field of development.

Volume X, Edition 2

## **YOUR CAMPAIGN IS OVER. NOW WHAT?**

For many Catholic schools, a campaign is an enormous undertaking. It is enormous on both the financial and emotional levels. Campaigns can be stressful but also a tremendous platform to advance your mission and educational ministry. Campaigns develop leadership, get donors excited and make dreams and plans realities.

As highly energized as campaigns can be, they can also be exhausting and at the conclusion of the solicitation process, create a tendency to relax with many leaders advising you ".... take it easy on the donors and to tone things down for a while."

Certainly, a donor would not be solicited another campaign gift after just making a five year pledge to your campaign, however, that donor should be reported to, cultivated and prepared to give in the future.

The development program should view the campaign as a platform for many opportunities in both the short term and long term. One of the first tasks would be to "take stock" of the campaign.

## **INVENTORY CAMPAIGN OUTCOMES**

The achievements, accomplishments and outcomes of a campaign are not limited to just a financial goal. Many outcomes and objectives have been realized whether we know it or not. They can include:

- **IDENTIFICATION OF VOLUNTEER LEADERSHIP** for future activities (Development Council, Endowment Board, Planned Giving Committee, Alumni Board).
- **"CREATION" OF MAJOR DONORS:** Major donors are created -- not found -- through the development and major gift/campaign process.
- **RESEARCH** was conducted in preparation for your campaign.
- **DEVELOPMENT SKILLS:** Cultivating and making calls to seek major gifts.
- **STRATEGIC PLANNING AND CASE BUILDING.**
- **CONDITIONING** publics to make large gifts to your school.
- **ENERGIZED AND EXCITED KEY LEADERS AND DONORS.**

- SEPARATED THE "TALKERS" FROM THE "DOERS".

It is important to step away from your campaign, gather a depth of field and look back to see all that has been accomplished and, most importantly, determine how all those accomplishments can enhance and be integrated into your development program. Campaigns are not separate entities -- standing alone -- but rather an important activity that is woven into the overall development program.

## **FOLLOW UP, WRAP UP, CLEAN UP AND GEAR UP**

Looking back on a campaign can definitely be enlightening. If a Feasibility Study was conducted in preparation for the campaign, review the study itself. Note observations in the study, donor concerns, glean research and comments contained in the study. Determine if certain gifts in the study were or were not realized during the campaign.

A few questions to consider when looking at your campaign in retrospect:

- Who were the most effective "leader-donors" that can move over to your standing Development Council?
- Who were campaign donors or prospects who should be approached about planned gifts?
- Were all donor notes or requests during the pledge process followed up on and responded to promptly?
- Did any major gift prospects ask to be called on at a later date?
- Who made one time gifts?
- Who made gifts of non-cash assets such as securities, land, etc.?
- What calls are still outstanding and what is the timeline to complete those calls?
- Did some donors restrict or earmark their gifts and do we plan to honor those intentions?
- Are any foundations or corporations still contemplating proposals related to the campaign or are proposals yet to be submitted?
- Did any matching gifts fall through the cracks?

## **SYSTEMS AND PLEDGE FULFILLMENT**

Typically, a pledge fulfillment rate of 95% is considered good. People's circumstances change, donors can pass away, become ill or infirmed. But some people simply lose interest and choose not to fulfill their pledge. A good pledge fulfillment system can help the rate of donor retention.

A fulfillment system isn't limited to simply a software system with payment reminders and billing donor payments. A real fulfillment system is replete with thanks, acknowledgment and reporting to all donors. The pledge or fulfillment period, usually three to five years, should be a period of upbeat, positive activities and an opportunity to develop long term relationships with your donors. Think of your pledge/fulfillment reminder system as an ongoing communication means between you and the donor that builds a stronger relationship over time.

As we mentioned, most campaign gifts are pledged over a three to five year period. Remember that giving is a habit and a wonderful opportunity to develop a quality donor cycle: GIVING -- THANKING -- REPORTING -- GIVING -- THANKING -- REPORTING -- GIVING AGAIN.

Consider the following activities throughout the pledge process:

- A special recognition/appreciation or gift each year of the pledge on its anniversary.
- Use your pledge reminder envelope as a "carrier" for other messages, appreciation opportunities and enclosures.
- Personally telephone and thank mid-range donors during the year.
- Schedule yearly individual report luncheon meetings with major donors.
- List all campaign donors in your annual report (by club).
- Once a year, have a Thank You Reception (brunch, cordial hour/reception, campaign donor dinner) for campaign donors; report on the campaign project, total pledges, receipts to date; take photos and write a follow up story with pictures for your development newsletter.
- Have your leadership talk to the donors assembled about how their generosity has specifically enhanced the mission of the institution; cite specific examples how it has helped individual people.

## **EXTENDING THE GIFT GIVING PROCESS**

Typically, campaigns engender large gifts pledged over a three to five year process. One of the wonderful outcomes of a campaign is the "giving habit." Donors get into the habit of giving to your Catholic school on a regular consistent basis. By the implementing the GIVING -- THANKING -- REPORTING AND REPORTING process, you can stimulate many donors to continue their gift giving when they complete their campaign pledge.

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### **+QUARTERLY+ CHECKLIST**

This edition's **+QUARTERLY+ CHECKLIST** focuses on strategies to keep the gift giving process going and growing as the campaign pledge period concludes:

- Explain to your donors that you have come to "...rely on your generosity..." and would they "prayerfully consider" continuing that generosity."
- Colleges and universities usually move through a strategic visioning and planning process along with the campaign cycle so they are ready for another campaign every five years.
- Consider inviting your campaign donors to your Annual Fund at the end of their pledge; if they are also giving to the Annual Fund ask them to consider adding their pledge amount or part of the pledge amount to their annual gift.
- Survey your donors on occasion throughout the pledge period, identify their interests be prepared to make a proposal to them for gift options related to the area of donor interest.

- Consider the concept of "gift endowment" -- the donor endows his or her gift to the campaign, names it as an endowed memorial and continues that gift in perpetuity.
  - Publish a "campaign newsletter" during the pledge period of the campaign -- not just during the solicitation period; the newsletter should list all those who have made a pledge and a special thank you list of those that have completed their pledges.
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