

# **The Campaign for Keewaydin Foundation**



Salisbury, VT

**DRAFT Comprehensive Campaign Plan**

(Last Updated February 9, 2023)

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## I. Purpose of the Campaign for Keewaydin Foundation

The purpose of the campaign for KF is to seek \$20,000,000 in optimum needs through private support from KF supporters—Board members, alumni, parents, grandparents, and current and former staff—who share KF’s vision to broaden the socio-economic diversity at its summer camps; make necessary capital improvements to its facilities; and to build a Preservation Fund that will sustain program excellence, provide funds to steward KF’s facilities and grounds, keep tuition growth reasonable, address urgent operation costs that arise, and weather periods of potential low enrollment. Funding in the form of five-year pledges, cash and other gifts will fund urgent campaign priorities as follows:

	MINIMUM - \$15,000,000		OPTIMUM - \$20,000,000	
	Spendable FY23-FY28	Endowment/ Other*	Spendable FY 23-FY28	Endowment/ Other*
<b><u>PEOPLE</u></b>				
Staff Capacity**	\$1,600,000		\$1,750,000	
Staff Support		\$3,400,000		\$4,000,000
Camper Support	\$500,000	\$2,500,000	\$750,000	\$4,000,000
<b><u>PLACE</u></b>				
Capital Improvements	\$2,500,000		\$3,500,000	
<b><u>PROGRAMS</u></b>				
Annual Giving	\$2,000,000		\$2,000,000	
Preservation Fund*		\$2,500,000*		\$4,000,000*
	<b>\$6,600,000</b>	<b>\$8,400,000</b>	<b>\$8,000,000</b>	<b>\$12,000,000</b>

\*Preservation Fund = Unrestricted, Not Endowment

\*\*Campaign and Post-Campaign Operations/Succession

Once reviewed and adopted by the Board of Trustees at the recommendation of the Campaign Cabinet, this plan will accomplish two important objectives:

- Provide a time-tested blueprint for optimum financial and organizational success. (See Appendices A and B.)
- Equip all volunteers and advisors/staff working on the campaign with the same key expectations, procedures and timelines.

## II. Requirements for a Successful Campaign

Successful execution of this plan and the success of the campaign itself will depend upon the following fundamental prerequisites:

### A. **A Persuasive, Understandable, and Urgent Case for Support**

The *Case for Support* details KF's history of service through programs, present challenges, and proposed solutions. It is the source document of all promotional materials in the campaign. The Case effectively and persuasively presents the needs and addresses the benefits of the campaign—benefits for current and future campers and staff. The major goal of the Case for Support is to convince potential contributors that their investments are for a unique, important, and urgent cause. Tremendous personal pride and satisfaction result from the knowledge that pledges will be used to fulfill the most urgent needs of KF. Donors must see that their gifts will make a tangible difference today and significant impact on KF's future for successful programs, financial vitality, and preservation of place. The Case details these critical components and helps foster these connections for campaign prospects.

### B. **Unanimity by KF's Board Regarding Campaign Needs and Plan to Meet Needs**

### C. **Strong and Effective Leadership (Volunteer and Staff)**

Effective fundraising begins with selection of the most highly qualified individuals to serve as campaign leaders, beginning with the Board. A campaign organization made up of well-respected leaders with personal, and in some instances multi-generational, connections to KF will attract maximum support.

Appropriate leaders and capable volunteers must be identified, engaged, and recruited for the Campaign Cabinet and various campaign committees. The quality and commitment of leadership must inspire others of similar ability and means to join the campaign and will determine the ultimate success of the campaign.

Dozens of enthusiastic, dedicated, and informed volunteers are needed to accomplish the face-to-face solicitation of all potential donors above the Major Gifts level. Only by soliciting pledges that are "thoughtful, fully proportionate, and commensurate with the donor's ability to give" over the next five years can KF's campaign succeed.

### D. **Thorough Prospect Review and Evaluation**

A *Standards of Giving Necessary for Success* chart has been developed to assist in the process of determining appropriate asking figures for campaign prospects (see Appendix C). This chart reflects **KF's optimum needs of \$20,000,000**. Recognize that more than half of campaign funds raised for similar campaigns typically comes from 10–12 gifts, and that more than 90% is given by 100–125 donors.

Through **confidential** prospect research, review, and engagement, the campaign must identify enough contributors capable of participating at each of the giving levels as depicted on the chart. In addition to formal professional fund-raising research, each prospect will be evaluated by campaign leadership, the Campaign Cabinet, and other campaign volunteers to determine the actual range of commitment that should be suggested by the eventual soliciting team. The appropriate soliciting division (i.e., Advance Gifts, Leadership Gifts, or Major/Annual Gifts) will narrow and refine possible figures and types of gifts for the solicitations.

### E. **Adequate Investment of Funds for Campaign Expenses**

### F. **A Precise Timetable**

To ensure that the final goal will be achieved within the designated time frame for active campaigning, a detailed overall Campaign Timetable outlines the necessary steps to accomplish the Recruitment of leaders and volunteers and the solicitation of prospects within each campaign division. Observing this schedule and the more detailed division timetables will require continuous attention and diligent follow-up of campaign leaders

who are responsible for the successful execution of the total fund-raising effort. (See Appendix B for Timetable Summary)

### III. Philosophy of Approach

#### A. **Inside-Out: Setting the Pace**

Effective fundraising begins with those closest to the organization who understand and appreciate the need most intimately, the organization's "family" or "insiders." This group—Board Members, Cabinet, and Staff constitutes the Advance Gifts Division.

Thoughtful and proportionate giving by those closest to KF will enhance and define the credibility of the Case for Support, demonstrate a level of urgency, project confidence in KF's ability for success, and set the pace for the entire campaign. The Board of Trustees, Cabinet, and Staff must lead the way. Others more removed from KF will respond more generously if they perceive that the "family" is stretching their giving to a high level of their capacity.

A unified, positive team effort in planning and supporting the campaign will provide a strong signal to prospective donors that those closest to the organization understand and support KF's long-term vision, thereby encouraging the public at large to also embrace and support that vision.

#### B. **Top-Down: A Challenge to All**

Demonstrating leadership through generous contributions at the top is critical for a successful campaign. Those who are perceived to be in a financial position to make a major investment in KF are often regarded as leaders by others of more modest means. More so than any other constituent group, the Board and Cabinet must pledge at a **relatively higher level of their ability** as committed leaders and supporters of the institution.

Following Advance Gifts solicitations, a select number of Leadership Gifts prospects will be quietly solicited as the catalyst for additional lead gifts to the campaign. The Leadership Gifts Division will normally be limited to highly motivated prospects evaluated at a giving potential of \$50,000 and up. The Major/Annual Gifts Division will then focus on gifts up to \$49,999.

### IV. General Solicitation Guidelines

All prospects must be personally solicited by volunteers who have been carefully selected with regard to their personal and professional rapport with the prospect. Volunteers must be properly trained and equipped with the best research and most persuasive support materials possible.

The following guidelines should be observed throughout the campaign to ensure a high degree of success and the most efficient use of volunteers' time:

1. The Campaign Cabinet must be aware that "people give to people" and should, therefore, exercise the utmost care in the recruitment of volunteers at all levels. There should be a specific reason for the recruitment of each volunteer. Solicitation assignments should be cleared with the campaign office in advance of being recruited to prevent duplication of effort.
2. All volunteers will be asked to make their own thoughtful investment **before** soliciting others. The person recruiting another volunteer will *usually* be responsible for soliciting that individual.
3. Counsel recommends strongly that volunteers meet face-to-face with the major prospects (top 75–100) in teams of two or more trained solicitors, especially for early solicitations.

4. All volunteers (with few exceptions made for those working within the Major/Annual Gifts Division) will make personal, face-to-face presentations to their assigned prospective donors. Because non-verbal communication is far more effective than verbal content, face-to-face solicitations are essential to successful campaigns. Under certain circumstances, considerations can be made for face-to-face conversations and/or solicitations to take place virtually, as necessary, appropriate, or preferred by the parties involved.
5. **Volunteers should ordinarily expect to make at least two presentations to each major gift prospect.** The purpose of the first visit is often utilized for a discussion of KF's plans and the prospect's relative support—including a suggested "asking" or "think-about" figure. The purpose of the second visit is to commit the prospect to an investment consistent with the Standards of Giving chart. In a few instances a single visit may suffice (e.g. where the prospect has been recently engaged at least once for every digit sought in the solicitation ) and in other cases for Leadership Gift prospects, more than two visits may be necessary. Due to the time it takes to conduct a proper solicitation, most volunteers will be expected to serve as a lead solicitor with no more than five prospects at any one time.
6. **Pledge forms should never be left with prospects while they consider their gifts.** Typically pledge forms will be sent to the prospect by the campaign office once a verbal pledge has been made by the donor. Experienced campaigners know that leaving the pledge form all too frequently results in difficult follow-up and a pledge amount contrary than prospect evaluation has deemed possible. The bottom line is that KF and the campaign's funding priorities lose an opportunity.
7. **The ultimate decision regarding a donor's pledge is the donor's alone.** Campaign Volunteers should acknowledge and affirm that no one can or should presume to tell another what he or she can or must pledge. "Think-about" figures (also referred to as "evaluations" or "ask amounts") should never be construed as quotas or ratings; instead, they are intended to be presented to donors for their thoughtful consideration based on timely consideration of the donor's commitment to KF and philanthropy.
8. **A volunteer should accept the responsibility for soliciting a prospect only when he or she believes that: (a) the suggested asking figure is reasonable and obtainable; and (b) he or she is the best-qualified person to obtain the maximum pledge.** Any questions concerning the ask amount should be discussed with the campaign staff and leadership prior to solicitation. In no event should a volunteer ask his/her prospect for a pledge amount that is less than the agreed-upon asking figure. If a solicitation visit is not going as well as hoped, the volunteer should not provide a suggested amount.
9. Volunteers should be generally aware of and prepared to discuss the tax advantages of a gift, and the tax advantages to the donors *who itemize charitable deductions* when contributing highly appreciated stocks, bonds or other property. Volunteers should also be prepared to refer to the option of planned gifts – although volunteers are *not* expected to be proficient in this area. Campaign leadership and counsel will assist as necessary.
10. **Pledges, letters of intent, and irrevocable bequests are generally considered moral obligations,** solicited by volunteers, and given of one's own free will; fulfillment of the pledge rests, in large measure, upon the donor's confidence in KF and his or her good will.
11. **Donors wishing to remain anonymous** are asked to indicate that preference when signing the pledge form.

## V. Prospect Review and Evaluation

### A. Definition

Prospect review and evaluation is a **confidential process** in which well-informed volunteers work anonymously with campaign counsel and advisors/staff to identify and categorize the potential donor sources for a campaign. This process involves a careful screening and analysis of prospects considered capable of providing the top gifts for the campaign. The ultimate objectives in this process are: (a) to recommend appropriate asking figures for each donor prospect; and (b) to suggest the appropriate campaign representative(s) (advisors/staff and/or volunteer) who should visit with each donor prospect. Ideally, about four prospects should be identified for each gift required on the Standards of Giving Necessary for Success chart in Appendix C.

Prospect review and evaluation is a method used to help identify a valid consideration gift amount for each donor, a figure that accurately identifies for the donor the level of campaign needs required for the goal to be attained. Nothing is more frustrating for both donors and the organization than to discover too late that the need was not met because nobody told the donor what was really needed. Without a consideration figure, many donors are not able to identify what level of giving is appropriate.

Prospect review and evaluation is, however, a strategy for determining whether sufficient resources have been identified for the campaign needs to be met. Campaign leaders and selected volunteers will work confidentially from a list of donors who regularly support KF to categorize prospects into divisions. Once categorized, evaluation figures for consideration by each Advance and Leadership Gift prospect will be identified.

### B. Standards of Giving Necessary for Success

A cornerstone of prospect review and evaluation is the *Standards of Giving Necessary for Success* chart that is part of this Campaign Plan (see Appendix C). This chart is the campaign's road map to success. The Standards of Giving chart represents extensive experience with similar campaigns and similar organizations in New England and nationally, as well as the previously *Keewaydin Forever* Campaign. This campaign must approximate the gift levels reflected on the chart to ensure successful attainment of the campaign objective.

An internal optimum need of \$20,000,000 has been established for planning purposes. **No public goal will be established until the campaign is announced.** This will be scheduled after: a) completion of prospect review and evaluation; b) 100% solicitation of Board Members, advisors/staff, Cabinet, and the top 10 Leadership Gifts; and c) approximately 80% of the anticipated ultimate goal is committed.

### C. Rationale

Experience conclusively demonstrates that **no capital campaign with a dollar objective comparable to this effort can be successful with only out-of-pocket gifts.** Multi-year pledges commensurate with a donor's interest and commitment to KF and their ability to give are necessary to reach a goal of this magnitude.

One of the most serious dangers in a campaign is the tendency of interested constituents to give at a level commensurate with their annual fund giving or to past campaigns for KF or other organizations that have had substantially lower goals. Due to the magnitude of this campaign's objective, all potential donors will be asked to consider participating on a scale vastly increased over previous giving levels; for most donors, this "stretch" will entail committing to a multi-year pledge.

Effective prospect review and evaluation will raise the sights of all who participate and will guard against giving that is disproportionately low to the goal. The vast majority of those who will provide major support seek guidance from the volunteer who calls on them regarding a level of support that is proportionate to what others



are being asked to consider. "How much are you asking me to consider?" is a question frequently asked of volunteers. Prospect review and evaluation helps provide the volunteer with an appropriate response.

A recent mini-survey of a dozen contemporary philanthropists confirmed the oft-heard advice: *If a volunteer solicitor suggests an amount for the prospect's consideration in a way that is neither presumptuous nor offensive, the opportunity for a thoughtful and proportionate investment is significantly enhanced.*

Prospect review and evaluation also enables identification of potential donors about whom further research is needed, those who need to be more fully engaged or informed, and those who could be available for leadership or volunteer roles in the campaign.

## **VI. The Role of Volunteers**

More than any other factor, the success of a capital campaign depends on the creation and engagement of a volunteer organization led by the Campaign Chair(s) and Campaign Cabinet. These volunteers should be comprised of influential leaders willing to use his/her/their influence and who can also bring credibility and urgency to this campaign for KF.

The most important people to present the Case for Support are the Campaign Chair(s), Board President, Board Members and members of the Campaign Cabinet. There are often other knowledgeable and committed volunteers beyond the Cabinet, however, who have already made their own thoughtful and proportionate pledges at a similar level and can be instrumental in helping with particular prospective donors or volunteers based on their relationship or history. A team approach tailored to the individual donor with a volunteer who has given at a similar level will most often be the most productive.

Major donors have grown accustomed to being solicited for participation in important programs and projects. With the increased competition for their time and resources both at work and at home, it is very effective, impressive and even flattering to be asked for meaningful support face-to-face by a volunteer who is giving freely of his or her time and money.

### **A. Board of Trustees**

The KF Board, under whose authority and leadership the success of the campaign ultimately rests, must visibly support the concept and timing of this campaign and take an active role throughout. Expectations for the Board throughout the campaign include the following:

- The Board will be among the first groups to be solicited in the campaign. Members of the Board must make commitments over and above their regular, unrestricted annual support and fully with their means and interest. The investment and 100% participation from the Board must challenge and inspire those members who are not as familiar with KF's needs.
- Selected Board members will be asked during the campaign to accept responsibility for a reasonable number of high-level solicitations where appropriate.
- Members of the Board may be asked to accept leadership positions in the volunteer organization of the campaign.
- Members of the Board occasionally may be asked to identify key prospects and, if necessary, to assist engaging them.
- The Board will have periodic opportunity, through regular reports from the Chair(s), Campaign Director, to monitor progress of the campaign.

## **B. Campaign Cabinet**

A Campaign Cabinet consisting of 15 to 18 volunteers representing KF's best-suited constituents will be recruited by the Campaign Chair(s) with assistance and guidance from counsel. The Cabinet will assume major responsibility for the review and oversight of campaign plans, policies, and procedures.

The Cabinet will be composed of the following:

- Campaign Chair(s)
- Advance Gifts Chair(s)
- Leadership Gifts Chair(s)
- Major Gifts Chair(s)
- Awareness Chair(s)
- Campaign Treasurer
- Communications Chair(s)
- At-large members
- KF Executive Director
- KF Director of Development
- Campaign Director
- Campaign Counsel

At-large members may represent leaders whom the Campaign Chair(s) and staff consider important to the overall success of the campaign. The Cabinet should meet bi-monthly or more frequently as needed, with an Executive Committee that meets monthly or as needed.

The success of the campaign ultimately rests upon the authority and effectiveness of the Campaign Cabinet. While the Campaign Cabinet will be responsible for establishing policies and strategies that guide the overall campaign, the Board will also share responsibility for the leadership and direction of the entire campaign.

## **C. Campaign Executive Committee**

The Campaign Executive Committee of 3-5 volunteers will provide oversight and leadership for the most important strategic areas of the campaign—successful completion of the Advance Gifts and Leadership Gifts campaigns. The Executive Committee will meet monthly virtually or in person. The size of the group should remain small and be composed of the following:

- Campaign Chair(s)
- Advance Gifts Chair(s) (in the quiet phase)
- Leadership Gifts Chair(s) (when recruited)
- KF Executive Director-Pete Hare
- KF Director of Development-Mary Welz
- Campaign Director-Caisil Weldon
- Campaign Counsel-Bob Demont

This Committee will identify and assign among themselves many of the top priority prospects and work with counsel to develop appropriate divisional campaign organizations and monitor their progress. This Executive Committee will review ongoing campaign progress; provide initial oversight on the case for support; provide a forum for considering and refining campaign plans, procedures and initiatives before they are reviewed by the full Campaign Cabinet; establish agendas and major areas of focus for Cabinet meetings; review campaign communications and promotional materials; ensure campaign benchmarks are being met by the Cabinet; and monitor day-to-day progress of the campaign.

D. **Campaign Chair(s)**

The Campaign Chair(s) is the chief executive officer of the campaign organization and acts under the authority of the KF Board of Trustees and with support from, Campaign Counsel, and the Campaign Cabinet.

E. **Keewaydin Foundation Staff**

**KF Executive Director** will play an important and major role in shaping the plans and vision of the Campaign. He will be a member of the Campaign Cabinet and Campaign Executive Committee and will be involved in all major decisions regarding campaign plans. The campaign is a high priority for the ED and will require an intense commitment of his time and energy. Campaign staff, counsel, and leadership will frequently seek his views and assistance. The Executive Director must be especially involved in the engagement and recruitment of leadership for the campaign. He will assist key volunteers in the articulation of an appealing Case for Support at up to a dozen informal awareness meetings and will assist with many solicitation calls in the off-season. During camp season, every attempt will be made to have prospective supporters visit the camp and have some contact with the Executive Director.

**Director of Development** In partnership with the Campaign Director and Counsel, the Director of Development is an additional source of suggestion, implementation, inspiration, and strategy. She shares responsibility with Campaign Counsel in providing the "insistent voice" that keeps campaign activities within a specific and limited timetable. She serves as the central clearinghouse through which all Major Gift volunteers function and from which vision, reinforcement, patience, persistence and judgment regarding all campaign activities (and especially post-Kick off) come.

While also overseeing, maintaining, and growing the annual fund with her Associate Director, she attends all Cabinet meetings, implements awareness plans, develops campaign communications materials, oversees campaign reporting and stewardship including the campaign budget (through a Treasurer and the KF Business Office) and pledge collections, initiates prospect research, organizes and implements the Major/Annual Gifts division, and ensures that communications and logistics for all campaign events are addressed. She will manage the engagement, solicitation, and stewardship of 75-100 Major and Leadership Gift Prospects in close cooperation with the Demont team.

**Campaign Office Manager** is the individual responsible for the central administration of the comprehensive campaign. The COM, with direction and support from the Campaign Director and Director of Development, will create and maintain all files, data, agendas, minutes, and other supporting campaign documents. He/she/they will establish and implement, with recommendations from Campaign Counsel, a gift acknowledgment, stewardship, processing, and reporting process. They will assist the Campaign Director and DOD with a variety of tasks including proofreading, prospect research, and the production and distribution of campaign materials.

F. **Campaign Director and Campaign Counsel**

Campaign Counsel, including the Campaign Director, are responsible for the planning, organization, and implementation of the campaign once the plan is approved. Functioning in support of a volunteer organization and in partnership with Cabinet, Board, and Staff, the campaign counsel coordinates the identification, recruitment, and training of volunteers as well as the identification, engagement, and solicitation of campaign prospects.

Demont Associates will provide strategic campaign counsel and guidance to the Campaign Chair(s), Staff, and campaign leadership. The team of Caisil Weldon and Bob Demont will provide counsel to the Campaign Cabinet in developing strategy for the top 50 prospects and providing necessary training for personal solicitations. Caisil Weldon will direct day-to-day operations in close working relationship with KF Director of Development during the campaign as Campaign Director. She will manage the recruitment, training, and support of volunteers within the Cabinet, Advance Gifts and Leadership Gifts Divisions of the KF Campaign.

Demont is primarily responsible and accountable to the Campaign Chair(s) and Campaign Cabinet. The Campaign Director maintains frequent contact with all these key volunteers on a regular basis. Volunteers will be supported in all their work as solicitors by the Demont team.

## VII. Soliciting Divisions

The campaign will be organized into the following three Divisions: Advance Gifts, Leadership Gifts, and Major/Annual Gifts. (Refer to the Campaign Organizational Chart in Appendix A.)

### A. Advance Gifts Division: (Board, Campaign Cabinet, Staff)

The Advance Gifts Division will involve the Board of Trustees, Campaign Cabinet, and staff. Volunteers in this division are responsible for the face-to-face solicitation of KF's "family" at all gift levels, as well as select major donors. The success of the Advance Gifts Division will set the tone and the pace for the success of the entire campaign. Those not as close to the organization will look to the standard set by Advance Gifts support when determining their own level of giving. Following prospect review and in consultation with divisions within Advance Gifts.

#### Summary of Advance Gifts Requirements:

Includes:	Board of Trustees, Cabinet, & Staff
Giving Capacity:	All levels
Minimum Objective:	100% Participation; \$7M to \$8.5M
Number of Prospects:	40–50
Volunteers Required:	10–12
Planning:	10/22-3/23
Solicit:	2/23-8/23
Complete:	10/23

### B. Leadership Gifts Division

A Leadership Gifts Chair(s) will be recruited and serve on the Campaign Cabinet to focus on securing the top priority Leadership Gifts required for campaign success. The Leadership Gifts Chair will work to recruit additional effective Leadership Gifts volunteers. The Leadership Gifts Committee, ED, Director of Development, Campaign Director, and counsel, with input from others, will develop appropriate strategy for the personal solicitation of each Leadership Gift prospect.

#### Summary of Leadership Gifts Requirements:

Includes:	Alumni, Parents, Grandparents, Former Staff
Giving Capacity:	\$50,000 and up
Minimum Objective:	\$6M to \$8.5M
Number of Prospects:	150-200
Volunteers Required:	24-36

Planning:	6/23-10/23
Solicitation:	10/23-8/25
Complete by:	10/25

### C. **Major/Annual Gifts Division**

A Major & Annual Gifts Chair(s) will be recruited to serve on the Campaign Cabinet to focus on securing Major and Annual Gifts required for campaign success. The Major Gifts Chair will work to recruit additional effective Major/Annual Gifts volunteers. The Major/Annual Gifts leaders, Director of Development, Campaign Director, and counsel will develop appropriate plans for the personal solicitation of Major/Annual Gift prospects.

#### **Summary of Major/Annual Gifts Requirements:**

Includes:	Alumni, Parents, Grandparents, Former Staff
Giving Capacity:	Up to \$49,999
Minimum Objective:	\$2M to \$3M
Number of Prospects:	Numerous
Volunteers Required:	TBD
Planning:	TBD
Solicitation:	TBD
Complete by:	10/25

## VIII. **Non-Soliciting Committees and Appointees**

A number of volunteer positions will be important for the success of the campaign, including the appointment of a Campaign Treasurer to audit financial records and prepare reports for the Cabinet and Board of Trustees. The Treasurer should also serve on the Cabinet in order to effectively monitor progress.

Another non-soliciting committee to assist with campaign efforts includes an Awareness/Events Committee. The Awareness/Events Committee will oversee the planning of informal, small gatherings of prospective donors and leaders to inform them of KF's vision and strategic plans.

### A. **Campaign Treasurer**

Recruited by the Campaign Chair(s) with the concurrence of the Executive Committee, the Campaign Treasurer will review all pledge and cash contributions to the campaign and monitor the campaign budget. The Treasurer, with assistance from the campaign counsel and KF's administrative support team, will be responsible for confirming all documentation of contributions and payments for the duration of the pledge payment period. When authenticated and checked for accuracy and proper representation, the documentation becomes the official transmittal or giving record of the campaign and forms the basis of all official reporting of progress to the Cabinet.

The Campaign Treasurer will work with the Campaign Office Manager, the KF Business Office, and Campaign Counsel to develop accurate reports reflecting restricted and unrestricted gifts as well as deferred gifts consistent with campaign counting policies. The Treasurer will also monitor the allocation of funds towards campaign and campaign project needs.

The Campaign Treasurer will provide KF constituents with confidence that funds raised are handled properly and used for the stated needs of the campaign and that expenditures are adequately managed and reported.

## **Campaign Operating Budget**

The Treasurer, along with the ED, Director of Development and Campaign Director, will also monitor the campaign operating budget. Lines itemized in the campaign budget are for planning purposes and final expenses may vary from these figures while remaining within the total approved budget. All campaign purchases or expenses up to reasonable amounts will be approved and accounted for by KF Staff or as required by existing Board policy.

Budget and expense statements will be issued at regular, to be determined, intervals by the campaign office for review by KF Staff, Campaign Director, counsel, and Campaign Treasurer. Any increase in the budget would require a request in writing by either KF or campaign counsel and must be subsequently authorized, in writing, by the Board of Trustees. These reports will be shared with the Cabinet and the KF Board.

### **B. Awareness Committee**

Awareness Chair(s) may be appointed by the Campaign Chair(s) with input from staff, counsel, and Campaign Cabinet, with the goal of wide regional distribution (6 regions to include: Boston, NYC, Philadelphia, DC/VA, Cleveland, and Los Angeles). With support from the Campaign Office, these individuals will be responsible for organizing and planning all special and hosted events designed to raise awareness and giving sights for potential donors throughout all divisions of the campaign. These volunteers may also be asked to assist with developing the promotional materials for both the quiet phase (Advance Gifts and select Leadership Gifts) and the public phase.

### **C. Awareness Plan Draft**

#### **Overview**

By design, the Awareness program is initially focused on Leadership Gift prospects and provides an organized and intimate process of communication and education. It brings the story the Keewaydin Foundation, its need, and vision to these leading supporters. It seeks their suggestions, elevates their engagement, and lays the groundwork for their informed advocacy and optimally generous support.

Building on a Board Pilot Awareness meeting in Spring 2023, the primary vehicle will be 10-15 highly personalized small group meetings, from receptions on KF properties to more formal parties in a home or other intimate location.

**No solicitations will occur at these meetings.** Guests will be told that their personal assistance and financial support will be sought later. It is, however, important that the need for their support is emphasized during these informal meetings.

#### **Goals of Awareness Plan:**

1. To inform alumni, parents, and donors of KF's strategic initiatives and campaign plans;
2. To inspire supporters and friends to support the campaign with time and treasure; and
3. To equip KF's influential supporters to share the campaign story in their own words.

#### **Hosts**

The key to a successful awareness program is the careful selection of the hosts. Hosts should be selected based on their influence and their ability to obtain the attendance of the people they select from the invitee list. When

recruited, each host should immediately be thanked. Each host should be asked to indicate those dates during the period reserved that he or she prefers for their meetings or gatherings.

Hosts will: 1) mail/email letters of invitations to their prospective guests with assistance from the Campaign Office as may be required, 2) assist with follow up calls to invitees who have not replied, 3) coordinate preparations for their meeting with the Campaign Office, 4) welcome guests and, if comfortable, start the meeting with a brief introduction of the speakers, 5) encourage discussion, 6) review the meeting with leadership at its close, and 7) follow up the meeting with letters of appreciation or regret to the guests.

### **Pilot Party**

The Chairs of the Awareness Committee will host a virtual pilot party in which all hosts/hostesses will be invited. This 'rehearsal' will kick off the campaign awareness events. This pilot for Keewaydin Foundation has three purposes: 1) to familiarize the hosts with the meeting format, 2) to build on their specific interest and involvement, and 3) to have each host select invitees for his or her meeting.

### **Guest Selection**

When the names of invitees have been assembled, they will be compiled with addresses and phone numbers on a master list. Each host will indicate those prospective guests he or she would feel comfortable inviting to their event. Each host should select at least 30 - 50 guests. Since some hosts may choose the same guests, the Awareness Chairs and Campaign Counsel will allocate the appropriate, agreed upon number of guests to each host with their final approval. Geographic location should also be taken into consideration when developing invitation lists. Additional names should not be added to hosts' invitations lists without first clearing them with the Campaign Office. Invitees who do not attend one meeting will be asked again by another host later. After two attempts, the invitees will not be invited to another meeting unless a) they wish to, or b) the Chairs and Counsel agree that it is appropriate.

**Note:** Experience indicates that an average 25% response rate can be expected to attend when follow-up phone calls are made to prospective guests who have not responded (i.e., invite 20 couples (40 people) to get 5 couples (10 people) to attend).

### **Place of meeting/type of meeting**

Hosts may choose the location of their events, with comfort and optimum attendance being the primary objectives. Events may be breakfasts, luncheons, cocktail parties, coffee hour, dinners, or any other type of gathering during any time of day. Normally, informal, and intimate settings work best. Hosts should decide whether they wish to include spouses at these meetings.

### **Invitations**

The hosts should invite guests to their event using specifically designed invitations or their own personal or business stationary at least 4 weeks in advance of the scheduled meeting. Usually, a letter alone will not assure their attendance; it is important, therefore, that hosts follow up their invitations with a telephone call. Personal contact after the letter has been received is very important.

### **The Meetings**

Volunteers and staff representing Keewaydin Foundation will present the needs and plans. Abridged copies of the Case for Support and a draft Q&A piece will be available. Speakers will use appropriate materials to illustrate the main points. Once the structured program has been presented by effective speakers with appropriate visual aids, sufficient time must be made available for discussion.

The hosts can best stimulate this discussion, keep it moving, and bring out valued opinions of guests by posing key questions such as: *Is our plan sound? Have we made our needs, as well as our plans for meeting the needs, understandable and clear? What appeals to you most in our plans? What in your opinion is our strongest selling point?*

The resulting discussion will indicate the degree of interest of the guests. It will identify those who really care. Most people usually subscribe to those causes about which they care. And they usually care about those things in which they are deeply involved.

Before the meeting is adjourned, each guest should be asked: *Do you agree we are on the right track with our plans? Are our plans sound? Are our priorities well ordered? Will you give us your support by speaking favorably of the project to others? Would you be willing to host a similar meeting for some of your close friends and/or business associates (if more hosts are needed)? In addition to helping us communicate this story, will you help us with the fund-raising program later?*

A written confidential report should be completed by the Awareness Chairs and each host and sent to the Campaign Office after each meeting. This information will be extremely valuable for later follow-up.

### **Re-invitation**

A letter should be sent to absentees and declines expressing regret that they were unable to attend and extending another invitation for a subsequent meeting. Absentees and declines should be made known to the Awareness Chairs.

### **Suggested (informal) Letter of Invitation (on host's personal or business stationery):**

I am inviting you and \_\_\_\_\_ to a (breakfast/lunch/cocktail party) meeting at my home, (address) (or other location) on (date, time) to discuss the current and long term needs of Keewaydin Foundation.

This will be a small informal gathering with a brief presentation and time for remarks, questions, and discussion.

This is a time for conversation about Keewaydin Foundation's plans for \_\_\_\_\_. **There will be no solicitation at this meeting.**

We need your interest and advice. I look forward to having \_\_\_\_\_ with you and will call you in a few days to see if you can make it.

Sincerely,

### **Suggested Follow-up Letter/Re-invitation to those who could not attend:**

I'm sorry that you were unable to attend the gathering hosted by \_\_\_\_\_ to discuss the Keewaydin Foundation's plans for \_\_\_\_\_.

As part of our program to inform community leaders and seek their advice, I am hosting another meeting in \_\_\_\_\_ at \_\_\_\_\_ which I hope you can attend. **There will be no solicitation at this meeting.**

I hope that you will be able to join us. I think you'll find the meeting interesting and informative.



I will call you in a few days so that I can make final arrangements.

Sincerely,

**Suggested Formal Invitation:**

Mr. and Mrs. Robert D. Smith  
Cordially invite you and a guest  
For (cocktails, hors d'oeuvres/wine and cheese/dinner/ brunch) and conversation with  
(ED, Campaign Chairs, or other etc.)  
On Saturday, June --, 2023  
At five o'clock in the evening  
At 123 Main Street

Mingle at 5:00 p.m.  
Presentation on Keewaydin Foundation at 5:30 p.m.  
RSVP at 802-123-4567  
Solicitation of Input and Ideas ONLY

**Suggested Thank you Letter Following Attendance:**

Thank you very much for taking the time out of your busy schedule to attend our recent meeting about Keewaydin Foundation.

With many others, I look forward to a very successful Capital Campaign and moving Keewaydin Foundation forward through our plans .....

I hope that you found the plans that were presented informative and exciting. Let me know if you have any further thoughts or questions on the subject.

Sincerely,

**SAMPLE AWARENESS EVENT AGENDA:**

- |   |                                |
|---|--------------------------------|
| 1. Meal or refreshments (30 mins)                           | All                            |
| 2. Welcome to Guests by Hosts                               | Host                           |
| 3. Introduce Speaker  | Host                           |
| a. Purpose of Meeting:<br>Half Presentation/Half Discussion | Awareness Chair/Speaker        |
| 4. Program (30 mins)  |                                |
| a. WHY Keewaydin?<br>Alum/Staff/Parent Testimonial          | Campaign Leader                |
| b. Present KF Vision  | ED                             |
| c. The Campaign   | Campaign Leader                |
| 6. Discussion/Reactions/Feedback (30 mins)                  | All – led by Host or KF Leader |
| 7. Thanks and Adjournments                                  | KF Leader                      |

## **Awareness Timetable - DRAFT**

### **May 2023 – October 2023**

- Recruit Awareness Chairs (Campaign Executive Committee)
- Briefing/orientation meeting with Awareness Chairs, Campaign Chairs and Counsel
  - Form list of potential committee members
  - Choose date for pilot party
- Finalize Awareness and Events Plan
- Recruit 9-12 committee members (hosts/hostesses) (Awareness Chairs)
- Campaign Cabinet overview and approval of Awareness Plan
- Awareness Chairs meet to finalize pilot party and brainstorm events
- Host Pilot events for current Boards and past Board members

### **November 2023**

- Personally brief each host on the Awareness Plan, timetable, and prospective guest list
- Recruit additional hosts/hostesses as necessary
- Hosts/Hostesses to draft preliminary list of invitees
- Pilot party with Awareness Chairs as hosts
  - Confirm dates with hosts/hostesses
  - Confirm list of guests
- Plan and organize awareness meetings and events (including invitations to be mailed)
- Finalize list of invitees for each host/hostess event and date of event

### **December 2023 – September 2024**

- Continue Awareness campaign for Leadership Gifts prospects
- Maintain accurate information about Awareness activity participants and follow up if necessary (to include reinventions)
- Plan and organize awareness meetings and events for events throughout the period (including invitations to be mailed)

### **April 2024 – December 2024**

- Begin planning Campaign Kick-off Event(s) with Communications Committee
- Hold Campaign Kick-off Events (no later than Fall '24, perhaps July/Oct)
- Continue Awareness campaign for Leadership Gifts prospects
- Maintain accurate information about Awareness activity participants and follow up if necessary
- Continue and expand Awareness activities as needed
- Plan and organize awareness meetings and events

### **January 2025**

- Hold Campaign Kick-off Event with Communications Committee
- Continue Awareness campaign for Leadership Gifts prospects
- Maintain accurate information about Awareness activity participants and follow up if necessary
- Continue and expand Awareness activities as needed

### **January 2025 – September 2025**

- Continue Awareness campaign for Leadership and Major Gifts prospects as needed

## **D. Communications (Advisory)**

KF DOD AND Associate DOD, working with the Campaign Director, Campaign Counsel, and Communications Advisors will be responsible for developing and ensuring the professional production of communication tools proposed in this plan. Care must be taken to maintain consistency in the image and information communicated in all campaign materials.

No major materials will be finalized until both copy and format have been approved for accuracy, effect, and interpretation by KF and the Campaign Executive Committee, Communications Advisors or others as designated such as the Campaign Cabinet.

An effort will be made to see that KF's previous vendors are able to bid for services relating to communications materials. Final selection of communication consultants and graphic designers will be based upon several conditions, the most significant of which are:

1. Ability to meet deadlines
2. Ability to produce desired results
3. Ability to meet budgetary restrictions

Every effort will be made to encourage graphic design work donated towards the brochure to help keep costs at a minimum.

### **Need for Proper Timing**

Proper timing is important for the success of the Communications Plan. Intentional strategy will include launching slowly and methodically and building to a crescendo for the public phase of the effort. The Communications Timeline within Keewaydin's Campaign Timeline will direct appropriate scheduling throughout the Campaign.

## **IX. Communications Materials**

The following represents promotional and communication tools to be considered for KF's capital campaign. Final decisions on the nature of these specific tools or the addition of others will be determined as the Communications Plan is implemented and communications volunteers/advisors engage and provide review and feedback. Because the solicitation phase of the campaign will cover approximately 36 months, no major investments should be made on promotional materials without consideration of their "shelf life" and effectiveness throughout the solicitation period. Development of a solicitation packet or folder that allows inexpensive updating should be considered. Use of materials for mass mailings should consider standard envelope sizes as well as mailing costs.

### **Printed Materials**

**Case for Support (digital only):** A factual, comprehensive, and clear document describing KF and the reasons for the campaign; a call to action; the principal source of campaign information; an overview for solicitors; and the campaign needs. The Case provides the basis for the more public, brief campaign brochure. The Case for Support is the internal-only source document from which all copy for all promotional materials including the brochure and press releases emanate.

**Case Executive Summary:** An abbreviated version of the Case for Support that provides more details than a brochure but can be shared with select prospects who are interested in details about the needs and the campaign vision.

**Campaign Brochure:** An attractive, visually oriented publication summarizing the Case for Support, designed to emotionally connect with readers and encourage their generous support of the campaign's financial needs. Printed on quality stock, this publication will make appropriate use of photography, art, and architectural renderings.

**Logo/Theme:** A visual interpretation of the campaign's theme that is both easily identifiable and distinctive, the campaign theme and logo should be prominent on all campaign materials. The logo might be different from KF's traditional logo and graphically reflect the purpose of the campaign.

**Letterhead and Envelopes:** Standard size (8 ½ x 11) stationery for correspondence used by the campaign office and leadership. Includes logo, theme, address, phone number, email address, and web site of the campaign office. Stationery typically includes a list of campaign leadership and Cabinet.

**Pledge Forms/Letters of Intent/Irrevocable Bequest Documentation:** Serve as the formal contract between the donor and KF for campaign gifts. These include the amount of a gift, terms of payment, date, signature, address and donor recognition preferences.

**Question and Answer Document:** Anticipates the most frequent questions about KF and the campaign; provides brief factual responses; may be incorporated into a fact package and/or the major brochure.

**Ways of Giving Brochure:** Lists the tax advantages to giving and instructions for planned giving, stock gifts, and other appropriate giving avenues.

**Newsletter Inserts & Articles:** Periodic progress reports may be inserted in KF's newsletters, Annual Reports, or other appropriate publications during the public phase of the Campaign. Copy will promote special angles of the campaign, such as highlighting volunteers, donors, and noteworthy gifts.

**Thank You Cards/Letters to Volunteers and Donors:** Personalized messages of thanks from the Campaign Chair(s) to all volunteers and donors recognizing their involvement and support of the campaign program.

**Donor/Volunteer Recognition:** Includes any form of special acknowledgment or public recognition of campaign donors and/or volunteers. A list of gift recognition opportunities will be included.

**Volunteer Manual:** Comprehensive document providing useful suggestions to volunteers for the successful solicitation of donors. Reviews campaign gift reporting procedures as well as offers confidence-building tips.

**Solicitation Kit:** A folder prepared for volunteers when soliciting donors. Contains essential materials for the proper presentation of the campaign goals with a prospective donor. Usually includes the major brochure, Fact Sheet(s), Standards of Giving chart, Ways of Giving, Question and Answer Brochure, Case for Support Executive Summary, and Gift Recognition Opportunities list.

**Visual Displays:** High quality visual tools such as poster boards to attract attention and communicate campaign progress at Keewaydin locations and at all meetings, including Awareness events.

### **Digital Materials**

**Case for Support/"Source Document":** A factual, comprehensive, and clear document describing KF and the reasons for the campaign; a call to action; the principal source of campaign information; an overview for solicitors; and the campaign needs. This document provides the basis for the more public, brief campaign brochure. The

Case for Support is the **internal-only source document** from which all copy for all promotional materials including the brochure and press releases emanate.

**Campaign Video:** A campaign video is often used in various settings to tell the story and motivate donors to give. Further discussion is needed for the merits of a video as well as existing resources available to support this as part of the campaign for KF.

**Campaign e-Newsletter:** A brief, periodic publication used to update campaign volunteers, donors and prospects on Campaign progress and success. Targeted at top donors and insiders, this can be sent in the form of an email from the Executive Director or through mass email programs like Constant Contact.

**Web site:** A brief description of the campaign, names of campaign leaders and volunteers, and periodic progress updates will be included within KF's existing website during the public campaign.

**Social Media:** Coordinated publicity on all Keewaydin-related social media platforms regarding key Campaign successes and events.

**Media Outreach:** Press releases, letters to the editor, and editorial board outreach to appropriate media outlets and organizational partners.

### **Preliminary Communications Timetable Overview**

#### **Preparation Phase: March 2023 - June 2023**

1. Recruit Communications Advisors (KF Staff and Cabinet)
3. Review, refine and approve Communications Plan (Staff, Campaign Director, Counsel, and Cabinet)
4. Draft other communications materials, such as Q&A and Pledge Form (Staff/Counsel)
5. Finalize a Case for Support (Staff/Campaign Director and Counsel)

#### **Advance/Leadership Gifts Phase: May 2023 - December 2023**

1. Conduct appropriate meetings as required to:
  - Adopt Campaign Theme & Logo
  - Decide on graphic designer/print firm
  - Begin Brochure Format
2. Prepare newsletter copy and schedule (Staff)
3. Meet with production company for Campaign Video (Staff)
4. Finalize all other support materials, such as Question & Answer, visual displays, etc. (Staff, Campaign Director, Communications Advisors, Counsel)  
Meet with design firm (Staff, Campaign Director, Communications Advisors)
5. Coordinate and implement Communications materials with Awareness Events (Campaign Director, Communications Advisors, Counsel)
6. Finalize Brochure (Campaign Director, Cabinet)
7. Produce and send periodic bulletins to Campaign prospects and volunteers (Campaign Director/Staff)
8. Produce and send newsletter (Campaign Director/Staff)

#### **Major and Annual Gifts Phase: TBD, 2024**

1. Assist with coordination of Campaign Kick-off Event (Staff, Campaign Director, Communications Advisors, Counsel)
2. Intensify bulletins, newsletters, and organization-wide communications (Campaign Director/Staff)

## X. Campaign Policies

### A. Authorization of Campaign

Responsibility for the conduct of the campaign shall be vested by the Board of Trustees in partnership with the Campaign Chair(s), staff, Campaign Director, counsel, and Campaign Cabinet, with full authority to act in all matters affecting the campaign in accordance with the general policies established by KF's Board of Trustees.

1. All pledges and gifts will be made to KF.
2. All gifts will be accepted in accordance with KF's Gift Acceptance and Conflict of Interest Policies.
3. The normal pledge period will cover five years or six tax years (through January '28). Payments on pledges may be made annually, semi-annually, quarterly or at the discretion of the donor.
4. The active solicitation period for Annual Gifts and Campaign Pledges/Gifts will be through October 31, 2025 (FY-end).
5. In accordance with KF Gift Acceptance Policy, only the Campaign Executive Committee (with the ED) may, in special circumstances involving substantial or complicated gifts, extend the option of a longer pledge payment period.
6. Pledges or Gifts containing unusual features will be submitted to the Campaign Cabinet for review and recommendation of acceptance to the Board and/or the KF Gift Review Committee.
7. The Campaign Cabinet shall have the authority to accept letters of intent from donors if use of the pledge form is contrary to the donors' policies. This procedure should be used only when a pledge is unacceptable to the donor.
8. Gifts of securities in fulfillment of pledges are encouraged and may offer additional tax-saving benefits to donors. All securities will be properly recorded by the campaign office, which will issue an acknowledgment to the donor. It is recommended that securities be sold immediately upon receipt. Campaign credit will be based upon mean market value on the date of transfer to KF in accordance with IRS rulings, this amount will often differ from the value deposited after sale.
9. The Campaign Cabinet shall be authorized to accept gifts of real and/or personal property on a case-by-case basis as permitted by the Board of Trustees and existing policy. The retention or conversion of these assets shall be the responsibility of the Board of Trustees. The donor will be responsible for determining the value based on an objective appraisal in accordance with IRS rulings.
10. All future or deferred gifts, (e.g. annuities, trusts, gifts-in-kind, or insurance gifts) will be submitted to the Campaign Cabinet for review and approval of their appropriateness for acceptance and inclusion in the campaign total. Generally, these will be counted for campaign purposes at their present value (charitable deduction allowed by the IRS) based upon estimated life expectancies of the donor(s) as established by professional actuarial tables.
11. The Campaign Cabinet shall be authorized to accept only those in-kind gifts that directly relate to actual projected or budgeted project costs.
12. Gifts and pledges to the campaign will be acknowledged by the campaign office within 3 days, with a confirmation statement of the pledge or gift terms. The campaign office staff will forward all campaign

funds for immediate deposit in accordance with instructions established by the Campaign Treasurer, Cabinet, and/or Board of Trustees.

13. Letters of appreciation or thanks will be mailed from the Campaign Chair(s) to all donors as soon as possible within a week.
14. As authorized by the KF Board, the Campaign Cabinet shall establish and market Gift Recognition Opportunities to single donors or families and be authorized to accept memorial or Gift Recognition under such **terms** and **conditions** as are included and approved in this plan. Approval from the Cabinet is required for combined gifts of more than one donor or family when it is generally believed that to do so would result in more support.
15. Matching gifts will be soft-credited to the donor whose gift stimulated the match and recognized as part of the donor's total campaign gift. **Credit for payment will be given only after the matching gift payment is received.** Matching gifts will be recognized as part of the donor's total campaign gift and will be able to include this match for personal naming opportunities.
16. All pledge forms completed by donors will be retained by the campaign office during the duration of the pledge period. Afterwards, they will become part of KF's campaign records.

## **B. Specific Policies for Giving Credit for Campaign Gifts and Pledges**

### **Cash**

Full value.

### **Securities**

These are recorded at the median value between high and low quotations on the date the securities are released by the donor for the benefit of KF either directly or through a broker in accordance with the IRS guidelines. Exceptions may be required, however, when the securities are not readily marketable.

### **Real estate**

No gift of real estate shall be accepted without prior approval of the KF Gift Review Committee. If approved, campaign credit will be in accordance with the KF Gift Acceptance Policy.

### **Gifts-in-kind, non-marketable securities, closely held qualified stock, etc.**

These are credited in the same manner as real estate gifts, and subject to approval by the KF Gift Review Committee. The acknowledgment of such gifts should describe accurately the property given and should place a value on the property only with reference to the written, detailed third-party appraisal.

### **Deferred gifts: gifts subject to income interest, including trusts, annuities, pooled income funds, etc.**

All trusts and other deferred or long-term irrevocable instruments which are offered as campaign gifts will be reviewed by the Campaign Cabinet to establish campaign credit. **These gifts will receive campaign credit for the 3% discounted or remainder value of the gift on the date recognized by the IRS and valued by the IRS as a charitable deduction, although in some cases the donor may be recognized for the future or ultimate value of the gift.** Such gifts must be unrestricted or designated to endowment funds in accordance with established campaign needs. Remainder values cannot be allocated to the campaign facility needs where immediate expenditures of funds are required.

**Gifts of a residence with retained life**

These will be credited at the remainder value according to IRS regulations again in accordance with established campaign needs after the cash requirements of the campaign are met AND provided the gift is consistent with the KF Gift Acceptance Policy.

**Irrevocable trusts in which KF has a vested interest but the assets of which are held by a trustee outside KF**

For a charitable lead trust which is established within the campaign time frame, and for which KF will receive annual income beginning during the campaign, the campaign credit will be the full, face value of the five years of the income stream (as with all campaign pledges). All such instruments will be considered by the Campaign Cabinet on an individual basis.

**Life insurance policies which are owned by KF or for which KF is the irrevocable beneficiary**

Campaign credit will be accumulated cash value ("interpolated terminal reserve") on the date ownership of the policy is transferred to KF. KF's policy is to cash in any such policy unless otherwise requested by the donor. If KF retains the policy and the donor wishes to continue paying the premiums on the policy thereafter, the amount of each such reimbursement or the corresponding increase in the cash value of the policy, as appropriate, can count as a gift to the campaign.

**Irrevocable Bequests**

Full value of realized bequest. Bequests realized during the campaign will be given campaign credit provided they are unrestricted or designated for campaign objectives. Bequest intentions cannot receive campaign credit.

**C. Campaign Timetable**

To ensure that the accepted ultimate goal will be achieved within the period allotted to active campaigning, a timetable will be established to outline the necessary steps to accomplish the Recruitment of leaders and volunteers and the solicitation of prospects within each division. Within the first few months of campaign planning, the campaign timetable will be further refined and reviewed by the Campaign Cabinet and the Campaign Executive Committee. The Advance and Leadership Gifts Chair(s) input into refined plans for their divisional campaigns will be particularly critical.

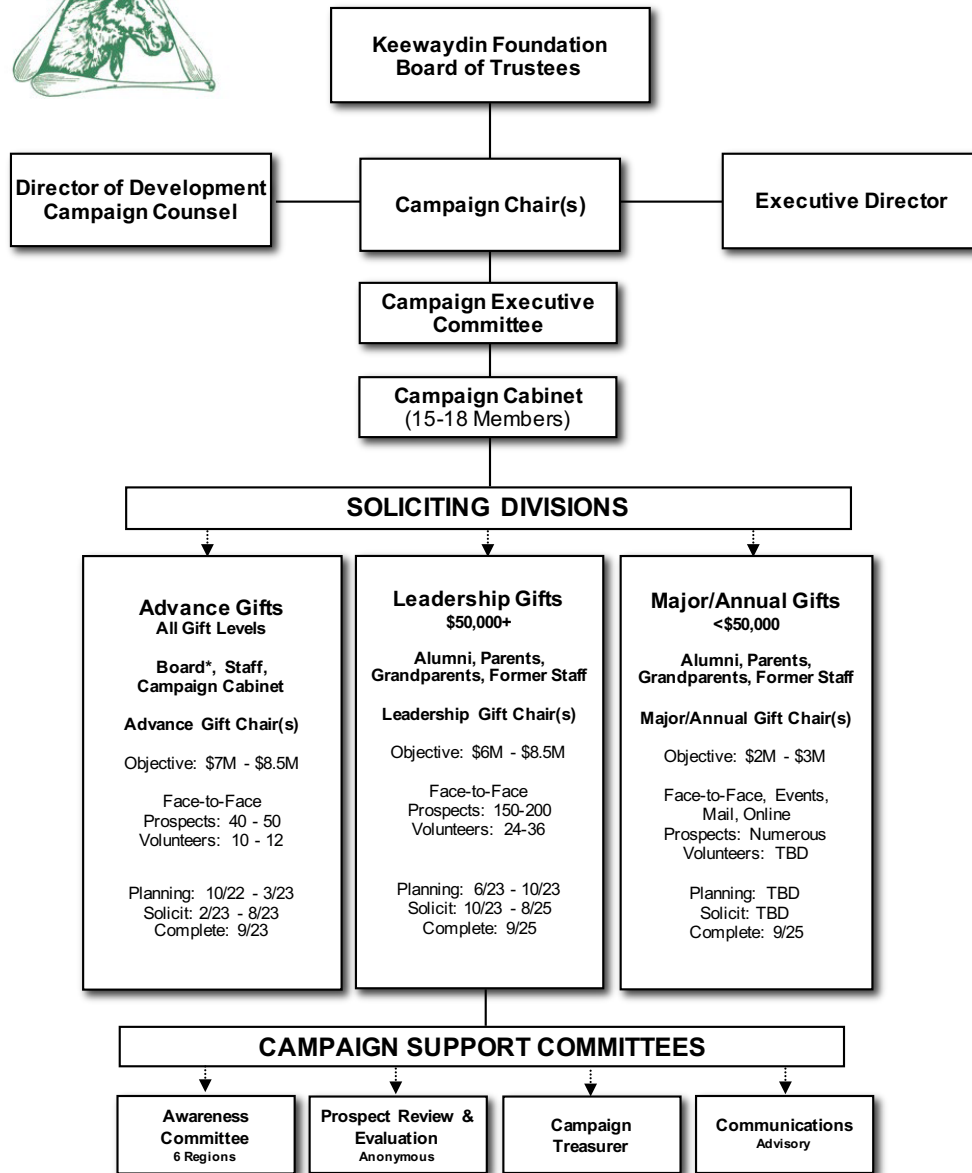
After the overall campaign timetable and the more detailed division timetables are reviewed and accepted by the Campaign Cabinet, it will be their responsibility and that of the division leaders and campaign staff to ensure that they are maintained. Maintaining the campaign timetables is critical to ensure the campaign's objectives are met and achieved as presented.



## Appendix A: Campaign Organization Chart



### Proposed Campaign Organizational Chart



## Appendix B: Campaign Timetable

A complete Campaign Timetable is being developed and will be refined after further discussion with the Campaign Cabinet. The timeline below outlines immediate priorities over the next 120 days.

<b>Campaign Task</b>	<b>Primary/Secondary Responsibility</b>
Provide Service Participants w/ Exec. Summary	ED/BD Pres/Counsel
Screen/Qualify Top 250 Major Prospects	DOD/Counsel
Refine \$20M Priority Needs/Update Pro Forma	ED/DOD/Counsel
Finalize Campaign Plan/Timetable/Policies	Counsel/DOD
Hire Campaign Office Manager	DOD/Counsel
Finalize Responsibilities of Development/Campaign Staff	DOD/Counsel
Qualify/Recruit 8-10 Campaign Cabinet Volunteers	Counsel/DOD/ED/BD Pres
Draft Proposals/Strategy for 5-6 AG Prospects	Counsel/DOD/ED
Draft Case/Communications Plan/Training Materials	Counsel/DOD/ED/Advisors
Conduct First Campaign Cabinet Meeting	Counsel/DOD/ED/CAB
Conduct Prospect Review w/Staff/CAB/Vols	Counsel/DOD
Plan Board "Pilot" Awareness Event	Counsel/DOD/CAB
Finalize 7-figure Prospects for Initial Gifts	Counsel/DOD/CAB

## Appendix C: Standards of Giving Necessary for Success (\$20,000,000)

### Standards of Giving Necessary for Success Keewaydin Foundation Optimum Objective: \$20,00,000



#### Guidelines:

Top Gift	15 - 25% of Objective
Top 10 Gifts	60 - 70 % of Objective
Next 100-125 Gifts	20 - 30% of Objective

No. of Gifts	Cumul No.	In the Range of	Total	Cumul. Total	Percentage
1		\$ 3,000,000	\$ 3,000,000	\$ 3,000,000	15.0%
1		\$ 2,500,000	\$ 2,500,000	\$ 5,500,000	
1		\$ 1,500,000	\$ 1,500,000	\$ 7,000,000	
2		\$ 1,000,000	\$ 2,000,000	\$ 9,000,000	
6	(11)	\$ 500,000	\$ 3,000,000	\$ 12,000,000	60.0%
10		\$ 250,000	\$ 2,500,000	\$ 14,500,000	
18		\$ 100,000	\$ 1,800,000	\$ 16,300,000	
25		\$ 50,000	\$ 1,250,000	\$ 17,550,000	
30		\$ 25,000	\$ 750,000	\$ 18,300,000	
40	(123)	\$ 10,000	\$ 400,000	\$ 18,700,000	93.5%
Numerous up to		\$ 10,000	\$ 1,300,000	\$ 20,000,000	100%





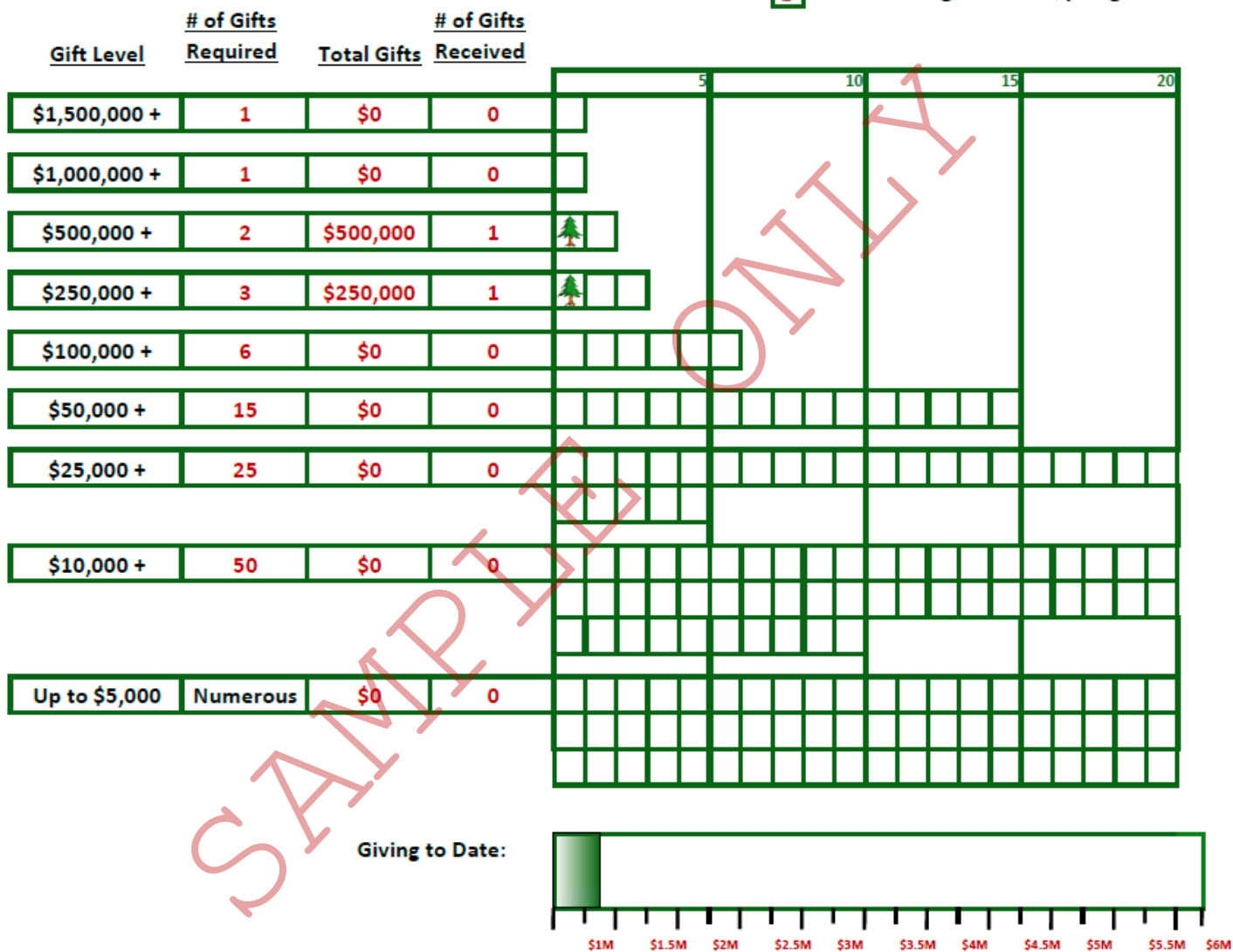
Philanthropic Counsel... Making a Lasting Difference for Good

# Appendix D: Gift Chart to Track Progress ("Star Chart")

Insert  
Client  
Logo  
Here

The Campaign for **Client**  
Gift Chart for Success  
Optimum Objective: **\$X.0 Million**

 = Gifts Required in Range  
 = Gift in Range received/pledged



**\$750,000 conditionally pledged as of June 14, 2018**

## Appendix E: Present Value Gift/Bequest Examples

### PV Gift/Bequest Illustrations

Life expectancy End of year:	Future Value Bequest	Discount rate 1%	Discount rate 2%	Discount rate 3%	Discount rate 4%	Discount rate 5%
1	\$100,000.00	\$99,000	\$98,000	\$97,000	\$96,000	\$95,000
2		\$96,030	\$95,060	\$94,090	\$92,160	\$90,250
3		\$93,149	\$92,208	\$91,267	\$88,474	\$85,738
4		\$90,355	\$89,442	\$88,529	\$84,935	\$81,451
5		\$87,644	\$86,759	\$85,873	\$81,537	\$77,378
6		\$85,015	\$84,156	\$83,297	\$78,276	\$73,509
7		\$82,464	\$81,631	\$80,798	\$75,145	\$69,834
8		\$79,990	\$79,182	\$78,374	\$72,139	\$66,342
9		\$77,591	\$76,807	\$76,023	\$69,253	\$63,025
10		\$75,263	\$74,503	\$73,742	\$66,483	\$59,874
11	75-Year-Old Male	\$73,005	\$72,268	\$71,530	\$63,824	\$56,880
12		\$70,815	\$70,100	\$69,384	\$61,271	\$54,036
13	75-Year-Old Female	\$68,690	\$67,997	\$67,303	\$58,820	\$51,334
14		\$66,630	\$65,957	\$65,284	\$56,467	\$48,767
15	70-Year-Old Male	\$64,631	\$63,978	\$63,325	\$54,209	\$46,329
16		\$62,692	\$62,059	\$61,425	\$52,040	\$44,013
17	70-Year-Old Female	\$60,811	\$60,197	\$59,583	\$49,959	\$41,812
18	65-Year-Old Male	\$58,987	\$58,391	\$57,795	\$47,960	\$39,721
19		\$57,217	\$56,639	\$56,061	\$46,042	\$37,735
20		\$55,501	\$54,940	\$54,379	\$44,200	\$35,849
21	65-Year-Old Female	\$53,836	\$53,292	\$52,748	\$42,432	\$34,056
22	60-Year-Old Male	\$52,221	\$51,693	\$51,166	\$40,735	\$32,353
23		\$50,654	\$50,142	\$49,631	\$39,106	\$30,736
24		\$49,134	\$48,638	\$48,142	\$37,541	\$29,199
25	60-Year-Old Female	\$47,660	\$47,179	\$46,697	\$36,040	\$27,739
26	55-Year-Old Male	\$46,230	\$45,764	\$45,297	\$34,598	\$26,352
27		\$44,844	\$44,391	\$43,938	\$33,214	\$25,034
28		\$43,498	\$43,059	\$42,620	\$31,886	\$23,783
29	55-Year-Old Female	\$42,193	\$41,767	\$41,341	\$30,610	\$22,594
30		\$40,928	\$40,514	\$40,101	\$29,386	\$21,464
31		\$39,700	\$39,299	\$38,898	\$28,210	\$20,391
32		\$38,509	\$38,120	\$37,731	\$27,082	\$19,371
33		\$37,353	\$36,976	\$36,599	\$25,999	\$18,403
34		\$36,233	\$35,867	\$35,501	\$24,959	\$17,482
35		\$35,146	\$34,791	\$34,436	\$23,960	\$16,608
36		\$34,091	\$33,747	\$33,403	\$23,002	\$15,778
37		\$33,069	\$32,735	\$32,401	\$22,082	\$14,989
38		\$32,077	\$31,753	\$31,429	\$21,199	\$14,240
39		\$31,114	\$30,800	\$30,486	\$20,351	\$13,528
40		\$30,181	\$29,876	\$29,571	\$19,537	\$12,851

## Appendix F: Sample Letter of Intent

### The Campaign for KF: Campaign Letter of Intent

Insert image  
of KF logo  
and name here

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Email Address: \_\_\_\_\_

#### Campaign Cabinet

#### Chair(s)

#### Members at Large

##### *(Individual)*

I am/We are pleased to indicate our intention to give \$\_\_\_\_\_ by \_\_\_\_\_. Our hope and intention is to pay \$\_\_\_\_\_ in the future to be paid over \_\_\_\_\_ years, starting in \_\_\_\_\_. However, I/we cannot pledge this conditional amount or specify a definite time-frame for payments as it is subject to my/our personal financial circumstances from year to year. I/we will therefore do what I/we can each year and reserve the right to make gifts when possible through the campaign pledge period. I/we also reserve the right to extend the pledge period as business and personal circumstances may dictate and make additional gifts from my/our family to apply to this gift.

-- OR --

##### *(Foundation)*

I am/We are pleased to indicate our intention to give \$\_\_\_\_\_ by \_\_\_\_\_. Our hope and intention is to pay \$\_\_\_\_\_ in the future to be paid over \_\_\_\_\_ years starting in \_\_\_\_\_. However, I/we cannot pledge this conditional amount or specify a definite timeframe for payments as it is subject to the approval of the Trustees of the XYZ foundation/trust from year to year. I/we will therefore consider what I/we can each year and the Trustees of the XYZ foundation/trust reserve the right to make gifts when possible through the campaign pledge period.

##### I/We wish to be listed (please check one):

\_\_\_\_\_ Anonymously in any final listing of campaign donors

\_\_\_\_\_ With other donors as indicated above

\_\_\_\_\_ With other donors as indicated below (please print clearly):

##### Gift Recognition Opportunity Designation:

\_\_\_\_\_ I am/We are interested in the following Gift Recognition Opportunity (GRO):

Number: \_\_\_\_\_ GRO Title: \_\_\_\_\_

*Unless noted otherwise, all gifts will be unrestricted and allocated according to campaign needs. If you plan to make payments through a gift of appreciated securities, please contact the campaign office at (insert email here) in advance for the information your broker will need to complete the transaction and to ensure proper receipt and acknowledgement of your gift.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**\*The above LOI is NOT for campaign use. It is a sample representation. Personalized LOIs will be drafted later by campaign counsel.**

The Campaign for KF:  
Campaign Pledge Form

Insert image  
of KF logo  
and name here

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

**Campaign Cabinet**

**Chair(s)**

**Members at Large**

I/we hereby pledge, in consideration of the gifts of others, and meaning to bind my/our estate with this agreement, a total sum of \$\_\_\_\_\_ through 202X for \_\_\_\_\_ (unrestricted/designation).

For my/our pledge, I/we wish to make \_\_\_\_\_ (#) payments of \$\_\_\_\_\_ over a period of \_\_\_\_\_ years (ending no later than Month, year), beginning in \_\_\_\_\_ (month/year) on the following schedule:

Payment Schedule

- ☐ Annually: by the end of \_\_\_\_\_ (month) each year  
☐ Semi-Annually: by the end of \_\_\_\_\_ and \_\_\_\_\_ each year  
☐ Quarterly: months: \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_  
☐ Monthly ☐ Other (Please describe): \_\_\_\_\_

I/We wish to be listed (please check one):

\_\_\_\_\_ Anonymously in any final listing of campaign donors

\_\_\_\_\_ With other donors as indicated above

\_\_\_\_\_ With other donors as indicated below (please print clearly):  
\_\_\_\_\_

Gift Recognition Opportunity Designation:

\_\_\_\_\_ I am/We are interested in the following Gift Recognition Opportunity (GRO):

Number: \_\_\_\_\_ GRO Title: \_\_\_\_\_

*Unless noted otherwise, all gifts will be unrestricted and allocated according to campaign needs. If you plan to make payments through a gift of appreciated securities, please contact the campaign office at (insert email here) in advance for the information your broker will need to complete the transaction and to ensure proper receipt and acknowledgement of your gift.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**\*The above Pledge Form is NOT for campaign use. It is a sample representation. Personalized pledges will be drafted later by campaign counsel.**