



Giving Architects | 2024

Driving positive change for people, planet & place

Campaign Readiness Assessment and
Capital Campaign Overview

givingarchitects.com





Giving Architects design sound solutions based on international best practice, significant local awareness and the unique opportunities associated with each client.

We focus on solutions that deliver significant giving and investment for great causes to drive positive change for people, planet and place. Built on decades of combined experience, Giving Architects understands the needs, nuances, unique characteristics and cultural aspects of philanthropy and impact investment in Australia and New Zealand.

We have the knowledge and experience you need to achieve your mission in a world that is now, very different. We work with a wide range of organisations – different sizes, scope, sectors and purpose. We take the time to fully understand and appreciate your unique situation so that we can provide a solution that will work. We offer a wide range of services for the for-purpose sector and also design and facilitate impact investments.

We specialise in:

- *Capital Campaigns*
- *Fundraising strategy development*
- *Major donor programmes*
- *Gifts in Wills programmes*
- *Healthcare philanthropy*
- *Education advancement*
- *Digital strategy development*
- *Impact investment*



Our team



Clive Pedley CFRE FFINZ
Director and Chief Executive | Giving Architects

A thought leader and advisor continuing to raise tens of millions of dollars for great causes. Specialises in designing innovative philanthropy and impact investment models that enable money and purpose to work together.



Robert Brooke BSR Bsc. (Hons)
Senior Consultant | Giving Architects

Robert brings in a wealth of fundraising experience from offshore and New Zealand and has been involved in the educational advancement space since 2016 as a Development Manager at King's College. Prior to that he managed numerous functions including; marketing, sponsorships, membership and subscription management and has extensive sports event experience including Super Rugby, Test Matches, Rugby World Cup 2011 and Motor Sport Hall of Fame in the United Kingdom.



Jon McQueen
Senior Consultant | Giving Architects

Jon carries proven success in fundraising, sponsorship, sales and marketing, in the United Kingdom, Europe and New Zealand. He was previously in a fundraising role which was integral to the growth and sustainability of Land Search and Rescue and was part of a number of high profile fundraising projects, including leading Strategic Fundraising for Experience Wellington and successfully leading a Capital Campaign at the British High Commission in Wellington.



Marie De Silva MBus MBA ACIM
Marketing & Operations Manager | Giving Architects

Having transitioned to the social purpose sector after extensive experience in corporates, Marie brings a plethora of skills in leveraging digital presence and optimising digital outcomes for social purpose organisations keeping in mind the unique ecosystem in which they operate.



Carly Robertson
Copywriting Specialist | Giving Architects

With more than 10 years of experience working for leading charities in New Zealand and the United Kingdom, Carly knows what makes donors tick. Her background lies in event fundraising and marketing, but she also has experience in corporate sponsorship and community fundraising. Carly is Giving Architect's go-to copywriter, specialising in developing compelling and donor-centric Case for Support documents.



Nigel Harris MBA CFRE FFIA GAICD
Strategic Counsel | Giving Architects Australia

A Highly regarded non-profit sector leader specialising in philanthropy and effective fundraising. An outstanding track record in organisational growth and development with a unique range of experiences and insights in governance, executive leadership and applied fundraising practice.



Leigh Cleave MBA CFRE FFIA
Senior Associate | Giving Architects Australia

Dynamic in working with purpose driven organisations to build healthy and sustainable futures covering all aspects of fundraising across healthcare, medical research, international development, faith-based and community welfare sectors.



Stephanie Wise B.Des, Dip, MFIA
Associate | Giving Architects Australia

Stephanie is a passionate fundraiser with over 10 years of experience in events and fundraising across the not-for-profit and arts sectors. She has developed skills in events and project management, community fundraising, philanthropy, appeals, volunteer management, digital fundraising, registration, and ticketing platforms.



Bridget Brown BSc, BA, GradCertBus
Associate | Giving Architects Australia

Bridget is a communications professional who has worked for hospitals and not-for-profit organisations in the areas of communications, marketing, event management, project coordination and public relations in Australia and the United Kingdom. She has worked as a consultant for clients in the healthcare sector, the arts and community organisations.



»» Giving Architects has worked with many iconic charities over the years on transformational projects to grow their revenue.

A few of our clients include Legacy Brisbane, ChildFund New Zealand, Salvation Army of New Zealand, St John New Zealand, First Foundation, Graeme Dingle Foundation Auckland, Parenting Place, Habitat for Humanity, St. Cuthbert's College, Kristin School, Selwyn Foundation, Spectrum Foundation, Auckland Grammar School, King's College, Hawke's Bay Community Health and Sport Centre, Foundation North, Liston College, Dilworth School, New Zealand Breast Cancer Foundation, Starship Foundation, Catwalk Trust, Ronald McDonald House Charities, Cystic Fibrosis New Zealand, Coast Guard New Zealand, Community Energy Network, Kohatu Park Trust, Waikato Rugby Union, Christian Broadcasting Association, Tawa Anglican Church, Rhema Broadcasting Group, SPCA Auckland, Blind Low Vision, Heart Foundation, MOTAT and many more.

The Giving Architects Experience

Hear it from our clients...



Parenting Place



Hawke's Bay Community Health and Sport Centre



The Spectrum Foundation





»» Our 5 D approach

Giving Architects are highly renowned fundraising experts and advisors. We're passionate about helping organisations like yours make a lasting impact. Our tailored solutions, tried and true methods, and an unwavering commitment to your success, will help increase the capacity and capability of your fundraising efforts.

Our team have been involved in successful capital campaigns, major donor, gift and wills and general fundraising development since 2000. Giving Architects has established core fundraising strengths, expertise and significant experience that have increased with the development of a highly skilled team. Our approach to engaging and delivery of services involves 5 stages:

01

DISCOVERY

We begin by getting to know each other. Our goal is to understand your unique mission and where you aspire to be. Through open and candid discussions, we'll uncover the problem you need to solve.

02

DEEP-DIVE

During this stage, we engage in meaningful discussions with you and your wider community. By going deeper into your pain points, we determine the right solution tailored to your specific needs. Your input is invaluable as we craft a strategy that aligns with your vision.

03

DEVELOPMENT

Next, we leverage the expertise and experience of our team and your unique knowledge to develop a bespoke solution. By combining innovative ideas and best practice, we'll design a well-considered strategy that will maximise your impact.

04

DELIVERY

Once the approach has been agreed upon, our solution is delivered. From comprehensive reports of our findings to detailed strategic and implementation plans, we'll guide you through every step of the process.

05

DRIVE FORWARD

Our commitment doesn't end with the delivery. Many clients choose to keep us on board as advisors to drive their projects forward for maximum impact.



»» Campaign Readiness Assessment

Giving Architects recommends a Campaign Readiness Assessment to understand the response of the most likely supporters to a proposed project. We design sound solutions based on international best practice, significant local awareness and the unique opportunities associated with each client. We focus on solutions that deliver significant giving for great causes to drive positive social change. Built on more than 30 years of combined experience, we understand the needs, nuances, unique characteristics and cultural aspects of philanthropy and social investment in New Zealand.

As trusted advisors in the sector, Giving Architects specialises in growing revenue so organisations can fulfil their purpose, deliver greater impact and achieve sustainable financial growth. Often this involves raising millions of dollars for transformational projects.

Giving Architects has worked with many iconic New Zealand charities over the years. And over the last 24 months we have worked with several key organisations on transformational projects to grow their revenue. Giving Architects is also uniquely placed to evaluate impact investment options to complement philanthropy if required based on the needs of each project.



Campaign Readiness Assessment - Overview

The primary objectives of a Campaign Readiness Assessment are:

The outcomes - What you can expect:

- To engage with potential high-value donors directly and personally during 20 - 25 personal interviews. Those interviewed should represent the primary audience that could financially assist to achieve high value fundraising success, or positively influence that process.
- To test a prepared draft Case for Support with those who are engaged and assess their response to the key messages presented. It is important to understand their views and opinions about the organisation, as well as the proposed high-value fundraising project/s and campaigns.
- To identify and assess the most likely sources of significant philanthropic support.
- To identify and assess sources of influential leadership that can support and possibly be proactively involved in the fundraising
- Based on these findings and information reviewed, make sound recommendations, present an informed Capital Campaign fundraising strategy and a feasible fundraising target that could be achieved as a result.

- Due diligence for management, resulting in any decisions about commitments to high-value fundraising being based on a professional analysis and best-practice.
- An informed strategy that will include estimated costs and any additional resourcing requirements to support the campaign.
- An independent third-party report on the views and opinions of the audience that has been engaged. Straight forward questions and answers will be analysed and presented to reflect the confidential comments that are shared, accurately reflecting the sentiment and perception that exists amongst key stakeholders
- Key stakeholders become better informed and prospective high-value philanthropic partners who are inclined to support the organisation will be enthused, having been given priority to indicate their willingness to become informed and potentially involved.



Campaign Readiness Assessment Stakeholder engagement process

The process for identifying and engaging stakeholders for capital campaign readiness assessments involves:

- Considering previous donors who, if suitably informed and engaged, may have the inclination to make further financial contributions to support the organisation.
- Considering significant community stakeholders and influencers.
- Considering individuals and organisations that could be involved in funding or grant-making decisions to support the project.
- Influential leaders in the wider community.
- Develop the list to a total of 35- 40 names with addresses and contact details, prioritising the top 20 for initial approaches. The remainder can be approached if some of those initially approached decline or are unavailable
- A personal letter is sent from the organisation asking for advice and opinion to assist with important strategic decisions required to raise significant funds for the proposed project.
- The organisation follows up with a personal phone call asking if they have received the letter, whether they are prepared to be involved, and their preferred contact details.
- Those who have agreed then have their details provided to Giving Architects who make contact to arrange a convenient date, time and location for a 45-minute interview.
- Send the draft Case for Support document once an interview time has been secured so they can consider the base information available about the proposed project.

The interview process is as follows:

The interview has a set of questions which provide an effective conversation guideline. In effect they seek to understand the below for the project:





Campaign Readiness Assessment Roles & responsibilities

The role of the client

The Campaign Readiness Assessment process will require the client to assist to achieve a good outcome therefore the responsibilities of the client will be:

- Lead the development the draft Case for Support, assisted by Giving Architects.
- Provide a list of donors and potential donors e.g. 35- 40 names for interviews with contact details.
- Initiate contact with interviewees and invite them to take part in the assessment interviews.
- Review a list of questions to be included in the interview conversation guideline.
- Assist, where required, in setting up meetings between Giving Architects and the interviewee.
- Be available to advise Giving Architects on all issues as required.

Key responsibilities of campaign management

- Guide the client on the development of the draft Case for Support.
- Develop the Conversation Guideline.
- Secure and conduct the interviews in a professional manner and ensure agreed meeting times are met.
- Analyse information and prepare a report listing recommendations for the size, nature of the capital campaign, and strategy and provide an insight into the financial and personnel support required to undertake a significant fundraising campaign in the time frame given.

Campaign Readiness Assessment Key deliverables

- Between 20 – 25 interviews professionally and successfully concluded. At least 3 of these interviews will be to interview a combination of internal and external stakeholders.
- The draft Case for Support is either validated or changes adopted to align with the client's needs and the community's interests.
- The time frame is held to and the budget met. No variations are to be considered unless with the support of the client.
- Interviewees have had the opportunity to feel they have contributed to the initial campaign and indicate a willingness to continue involvement.
- Giving Architects team has worked closely with the client's team who are likely to be involved in fundraising.
- Giving Architects has performed to agreed professional criteria.
- A full report is provided with analysis and recommendations for a capital campaign process.



»» Capital Campaign process

With our proven track-record of raising millions of dollars for worthy causes, we're in our element developing campaigns that reach high-net-worth and high-value donors. We'll work with you and your stakeholders to create a well-informed strategy, but we won't stop there. We'll commit to seeing your project through to fruition.

The capital campaign process typically includes 4 stages:



Capital campaign methodology

Campaign stages and timing

Phase 01

03 months

Design and Development Phase & Early Foundation Gifts Conversion

- Define campaign priorities identified through the Campaign Readiness Assessment (CRA) with associated plans and costs.
- Set initial campaign target.
- Finalise case, key messages, campaign strategy, develop collateral, due diligence pack including the development of the campaign blueprint.
- Identify and engage potential campaign leadership to appoint to the Campaign Cabinet.
- Secure early foundation gifts that were identified during the CRA.
- Identify pool of potential advocates and high value donors based on current giving and networks.
- Prospect donor research and engagement.
- Define impact management and reporting process.
- Define donor care, recognition and stewardship.
- Ongoing direct engagement with most likely lead donors.
- Fully functional campaign office to support Campaign Cabinet and advocates.

Phase 02

06 months

Proactive Leadership, Quiet Phase Leadership Gift Conversion

- Campaign internally launched.
- Engagement, conversion of early lead gifts.
- Ongoing prospect engagement and cultivation towards asks.
- Prepare and present proposals for formal consideration, ie: PAFS and Trusts.
- Volunteer task forces and advocates engaged to support main Campaign Cabinet.
- Coaching, training and support of internal stakeholders and advocates.
- Develop and implement stewardship plans.
- All lead prospects assigned to active advocates and task forces.
- Enlistment and engagement events.
- Project specific activity and engagement with key researchers.
- Support of task forces and advocates through structured intentional asking.
- Work towards raising 50% of the target.
- Effectively utilise tax-year for donor pledged giving if relevant.
- Assign all early project major donor prospects.
- Ongoing research.
- Early preparation for the active phase.



Capital campaign methodology

Campaign stages and timing contd...

Phase 03

06 months

Active Phase, Major Donor Conversion

- Campaign publicly launched on the basis that 50% of target is raised.
- Project specific engagement activity for remaining major donors.
- Campaign Cabinet and Task Forces active.
- Support and training/coaching of project task forces and advocates.
- Identify and engage geographical tasks forces to support Campaign Cabinet including international if appropriate.
- Assignment of all significant remaining prospective donors.
- Ongoing prospect engagement and cultivation towards asks.
- Secure top 100 gifts in campaign gift chart before moving to unsolicited response opportunities.
- Effectively utilise tax-year for early donor pledged giving if appropriate .
- Aim to raise 90% of the target.

Phase 04

03 months

Public Phase, Implementation of Gift Stewardship & Donor Care

- Wider community engaged and those who support the organisation provided final opportunity to contribute for the balance 10% of target.
- Build on profile and campaign activity.
- Impact reporting scheduled.
- Gift stewardship and donor care plans further implemented.
- Campaign completion, thank you events completed.
- Transition activity into staff led high-value donor programme.



Capital campaign roles & responsibilities

Campaign Management requirements

Capital campaigns generate an additional cost to any organisation that undertakes them. Commonly accepted return on investment typically points to a 10% cost for capital campaigns, which is very favourable compared to other forms of fundraising. It is not expected that this campaign would exceed that level of cost, but there will certainly be significant hard costs involved, including:

- Additional staff and/or contractors, both direct and support roles.
- Campaign resources appropriate for the scale of investment being sought.
- Events and meetings.
- The soft cost of time by existing staff and volunteers.
- Travel costs for staff, volunteers and contractors to engage prospective donors.

In addition to the efforts of the organisation's leadership, a significant campaign management workload will be required to manage the planned campaign. Giving Architects will work to develop internal expertise and processes for the transition to internal management of high value donors at the end of the campaign.

At the commencement of the organisation will need to provide dedicated prospective donor research capacity and dedicated Development Office staff to assist with campaign management tasks.

Key responsibilities of campaign management

Developing and regularly reviewing the campaign strategy, reporting and associated resources.

Giving Architects will develop a preliminary strategy based on the findings during the Campaign Readiness Assessment. The detailed strategy will then be developed and regularly reviewed taking into consideration any new or emerging circumstances.

Campaign Management ensures the effective implementation of campaign tools, resources and reporting throughout the campaign period.



Your trusted advisors, partnering with your mission to design and deliver effective fundraising strategies

Driving positive change for people, planet and place

Get in touch with us today at:

www.givingarchitects.com