



Campbell & Company

SEATTLE **SYMPHONY**

CAMPAIGN PREPARATION

BUILDING THE PLANE WHILE FLYING IT

Jane Hargraft, Vice President of Development, Seattle Symphony

Craig Hightower, V.P. & Director Western Region, Campbell & Company

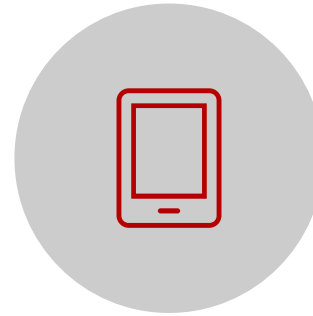
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OUR SPEAKERS



JANE HARGRAFT

Vice President of Development
Seattle Symphony



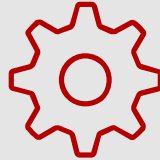
Craig Hightower

Vice President & Director, Western Region
Campbell & Company

WHAT WE WILL COVER TODAY...



Background on
the Seattle
Symphony



What they did to
prepare for a
campaign launch



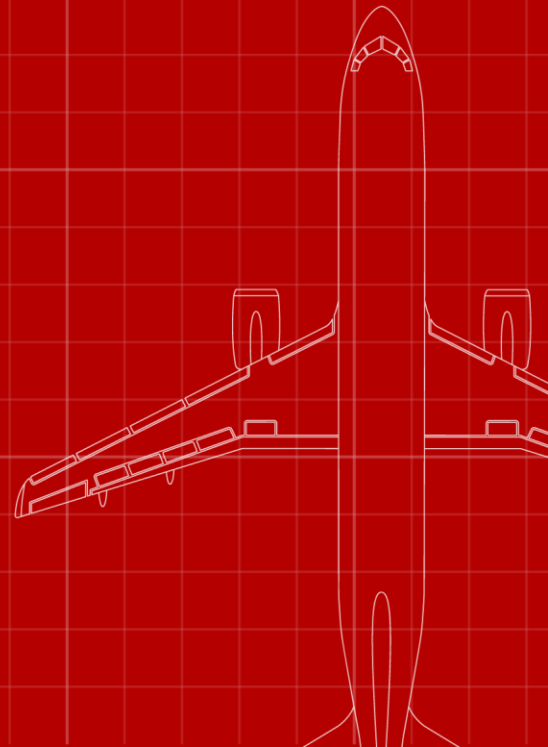
Where they are
now and
challenges
ahead



Questions from
participants

POLL

How many of you
are thinking about
launching a campaign
or currently in a
campaign?



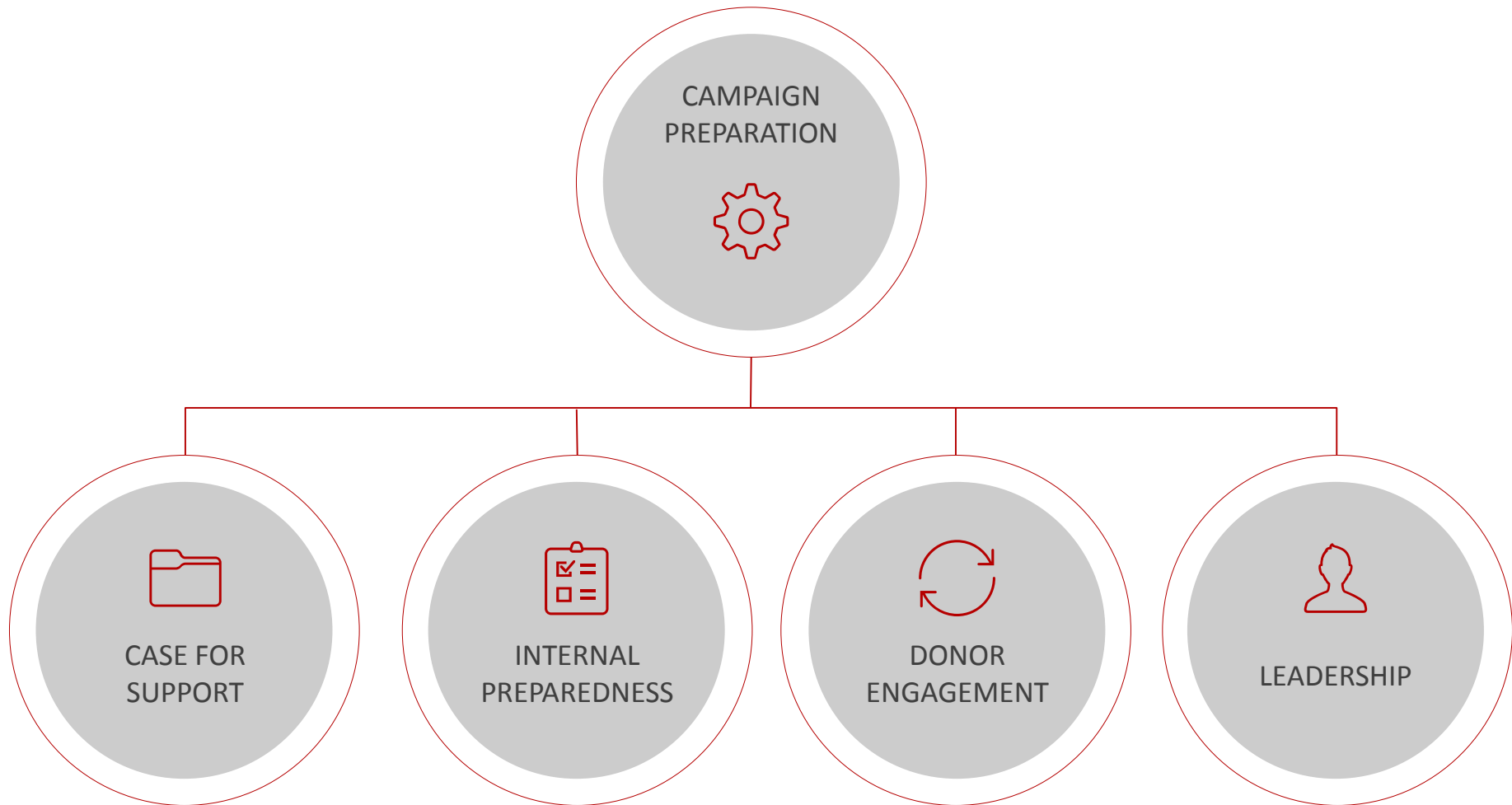
CHRONOLOGY



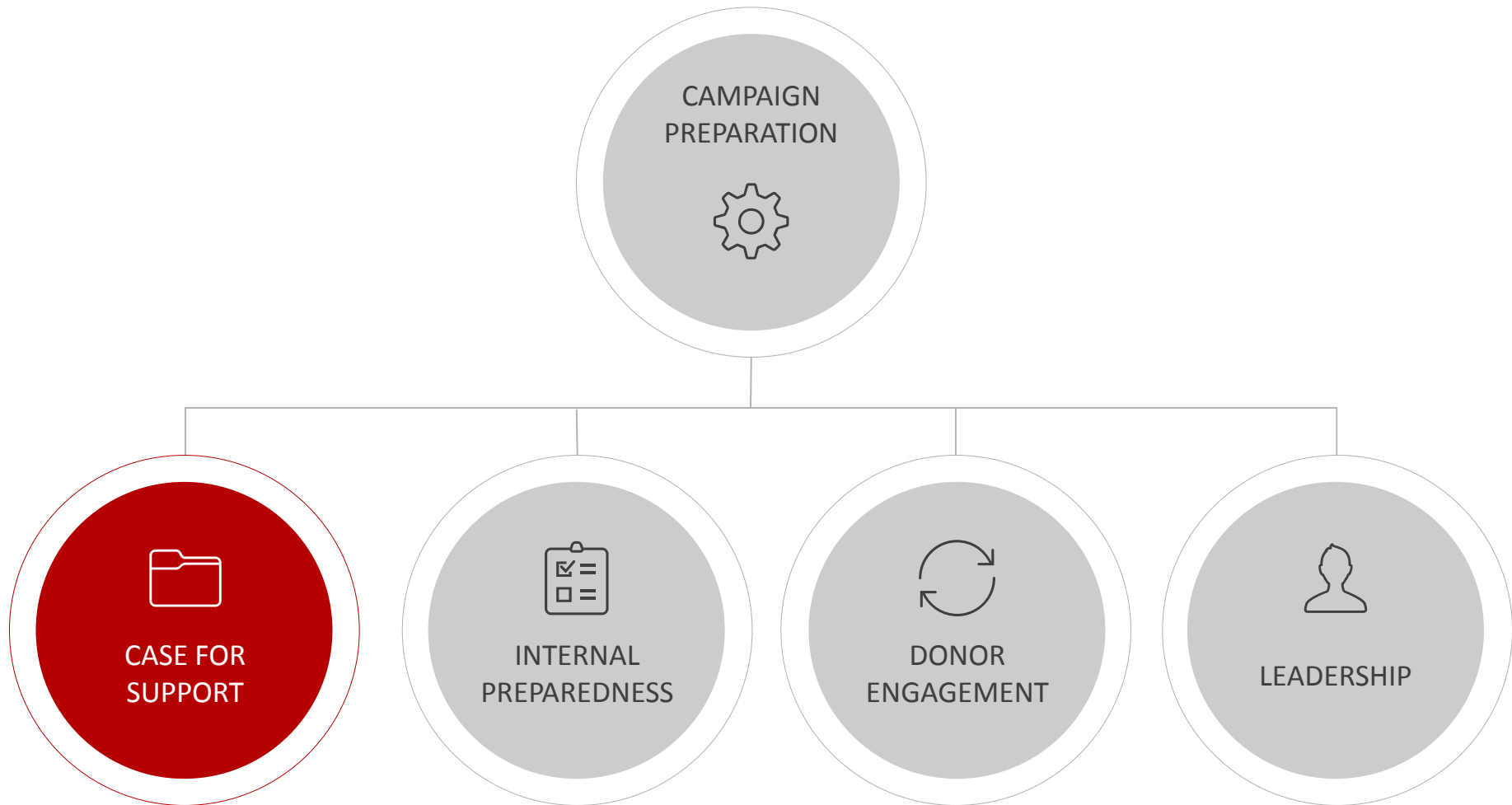
NO FEASIBILITY STUDY



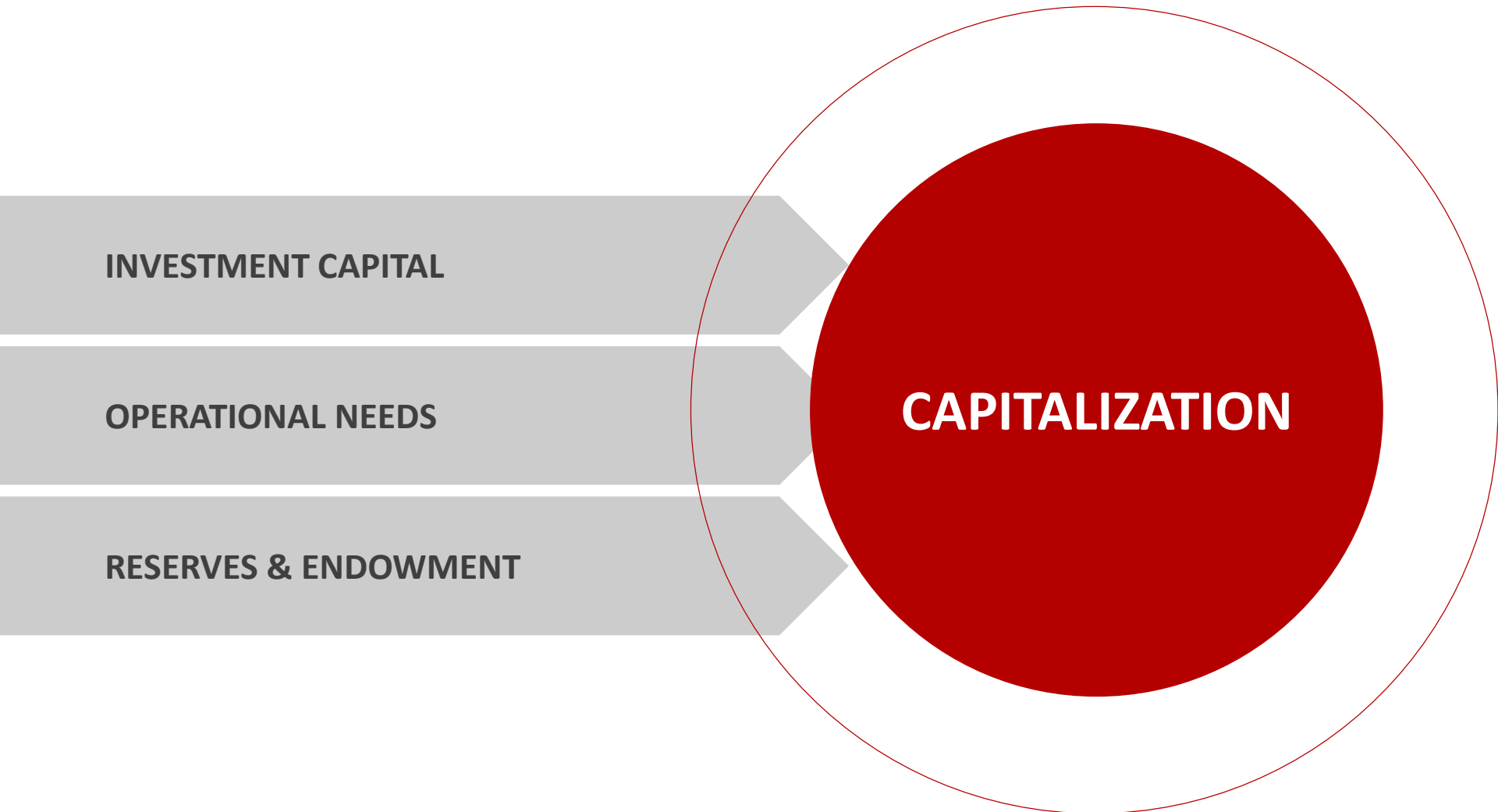
OUR STRATEGY



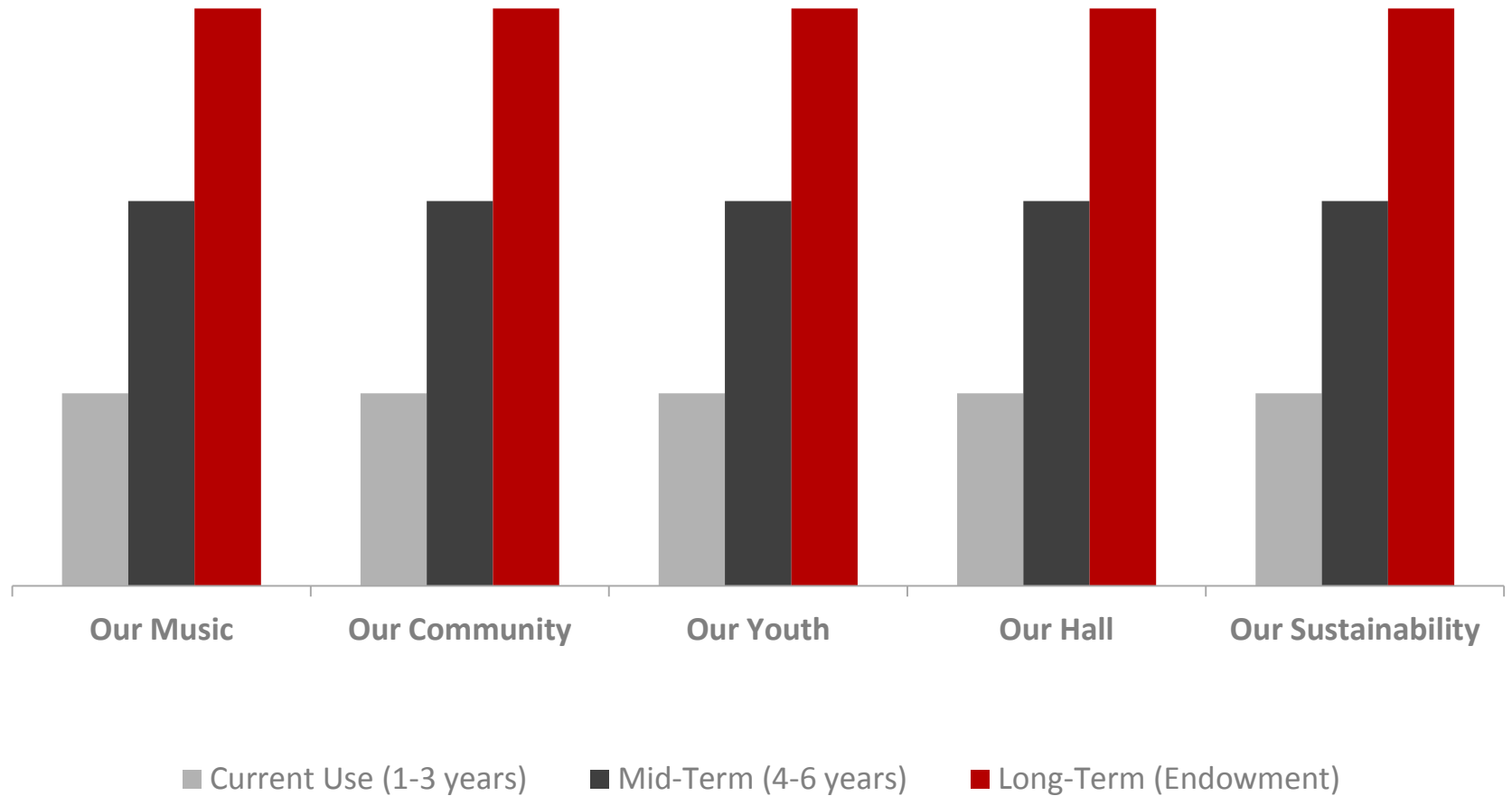
CASE FOR SUPPORT



COMPREHENSIVE NEEDS ASSESSMENT



BUCKETING EXERCISE



BOARD VISIONING SESSION

WHY THE NEED?

**HOW TO
CAPTURE
MOMENTUM?**

**PRESERVING OR
PUSHING?**

**WHAT DOES THE
FUTURE LOOK
LIKE?**

**WHAT'S THE
BALANCE?**

CASE DEVELOPED BY STAFF LEADERSHIP



COLLABORATIVE



CASE DEVELOPMENT

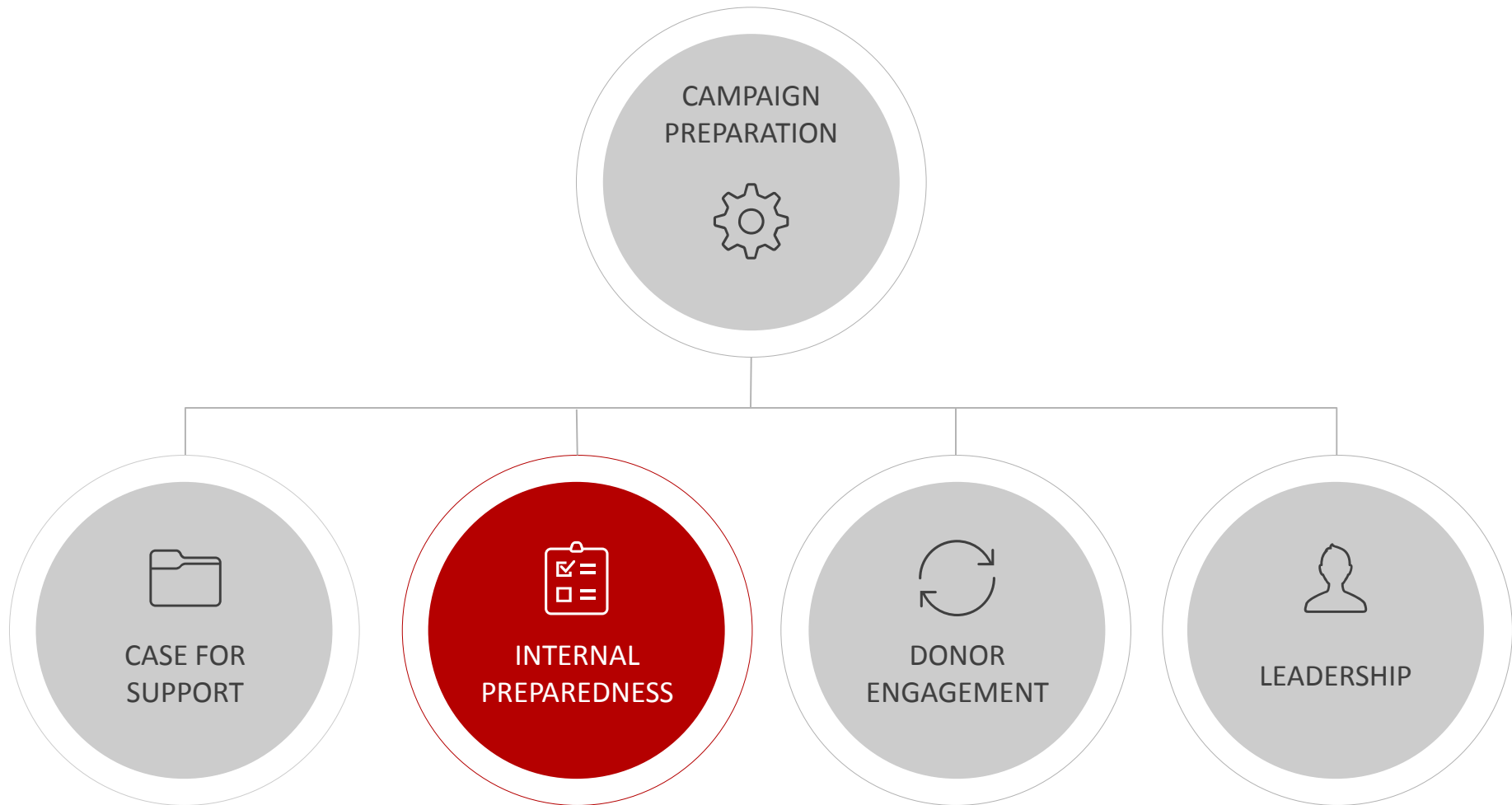


RECOMMENDATIONS

CAMPAIGN THEME

**FOREVER AND
FOR EVERYONE**
THE CAMPAIGN FOR THE SEATTLE SYMPHONY

INTERNAL PREPAREDNESS



PREDICTIVE MODELING



CAPACITY ANALYSIS



BEST WEALTH INDICATOR



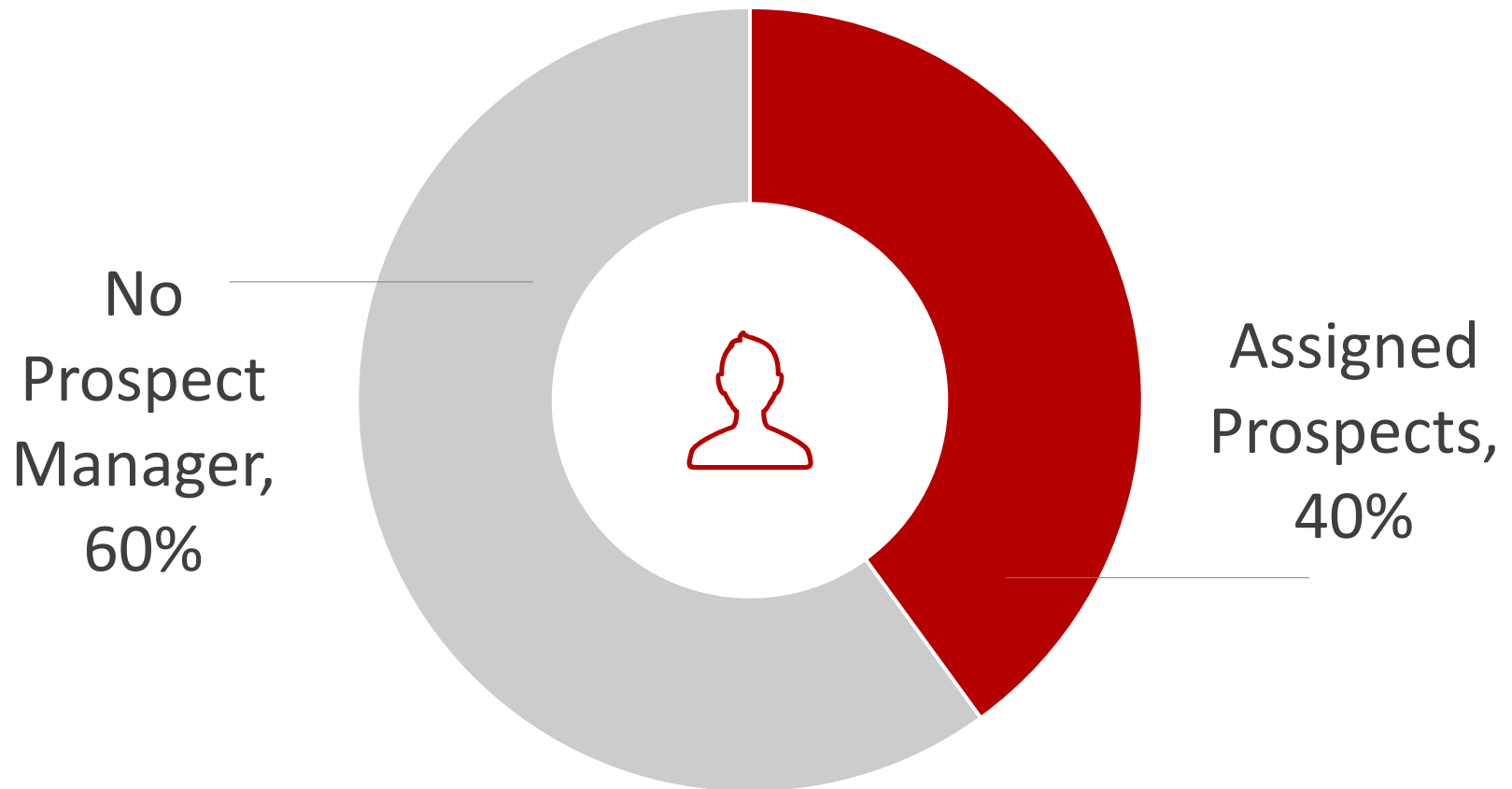
PROSPECTS

\$5,000,000	18
\$2,500,000	9
\$1,000,000	47
\$500,000	39
\$250,000	80
\$100,000	425
TOTAL	618

GAP ANALYSIS \$100 MILLION CAMPAIGN

LEVEL	GIFTS NEEDED	PROSPECTS NEEDED	PROSPECTS IDENTIFIED	GAP (+/-)
\$ 20,000,000	1	3	2	(1)
10,000,000	1	3	6	3
5,000,000	2	6	10	4
2,500,000	4	12	9	(3)
1,000,000	10	30	47	17
500,000	15	45	39	(6)
250,000	20	60	80	20
100,000	47	141	425	284
TOTAL	100	300	618	318

\$100K+ PROSPECTS UNDER MANAGEMENT

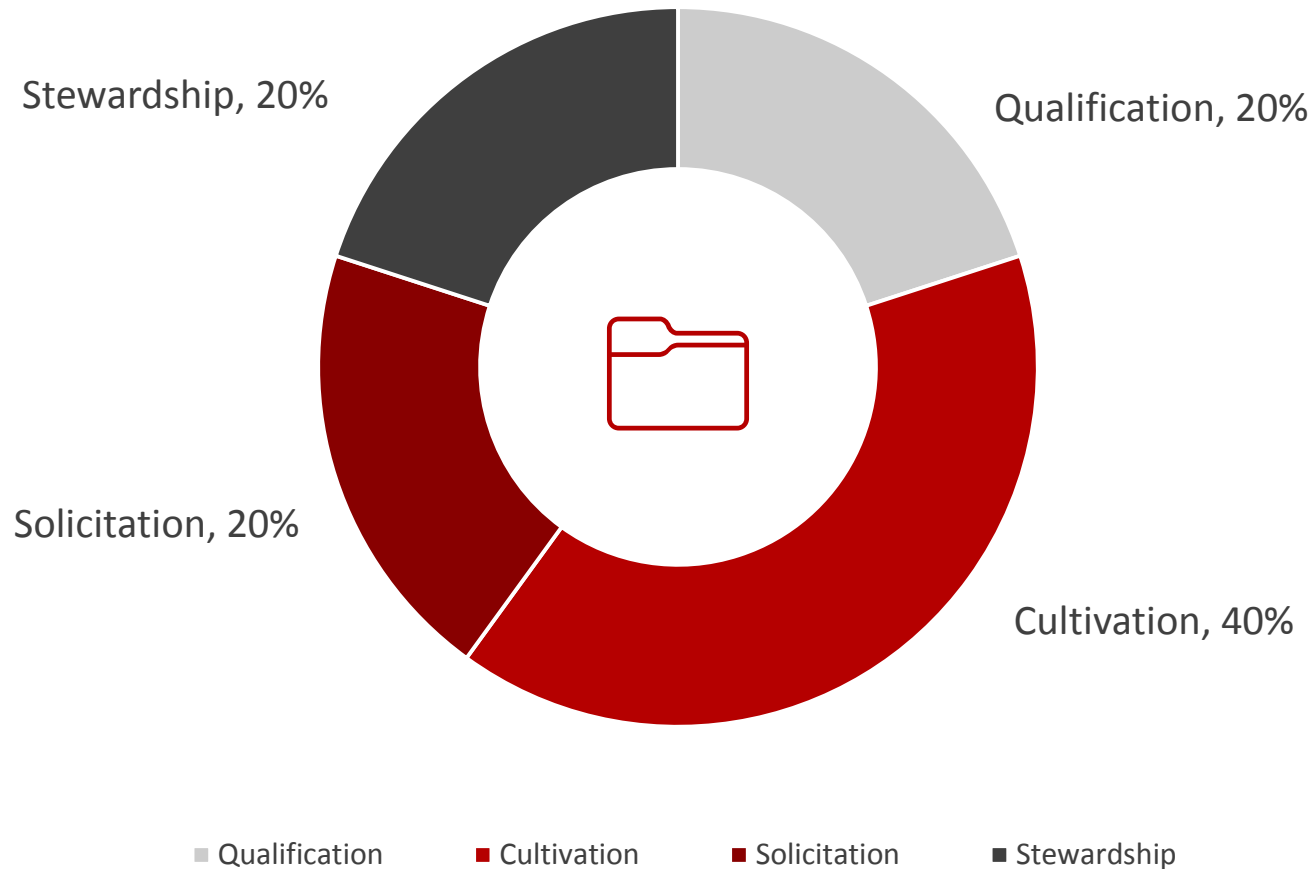


TOP PROSPECTS UNMANAGED

RATING	PROSPECTS MANAGED	FUTURE PROSPECTS MANAGED
\$1 million+	8%	1%
\$100,000+	21%	8%
Less than \$100,000	34%	28%
Total	100%	

REBALANCE PORTFOLIOS

SEPARATE DONOR RELATIONS PORTFOLIO



CULTIVATION / SOLICITATION METRICS

METRIC	SUGGESTED GOAL
Qualification Visits	5-10 per month
Strategy Memos Created	30 per year
Cultivation “Moves”	10-15 per month
Stewardship Visits	5-10 per month
Written Proposals	5-10 per year
Personal Solicitations	20% of portfolio
Donor Upgrade Rate (Annual Fund)	10-20% of portfolio

MAJOR GIFT AUDIT



STAFFING

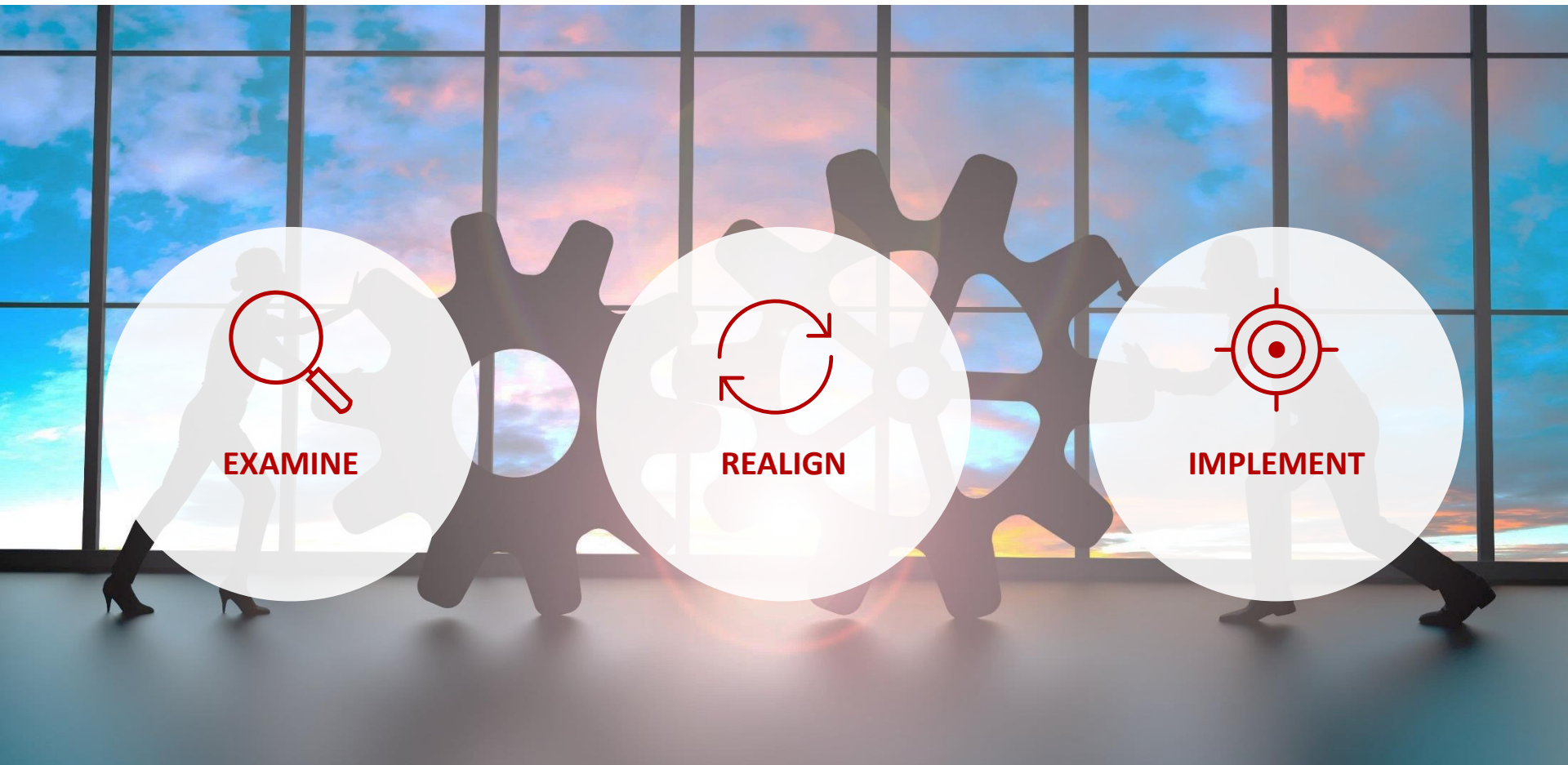


SYSTEMS

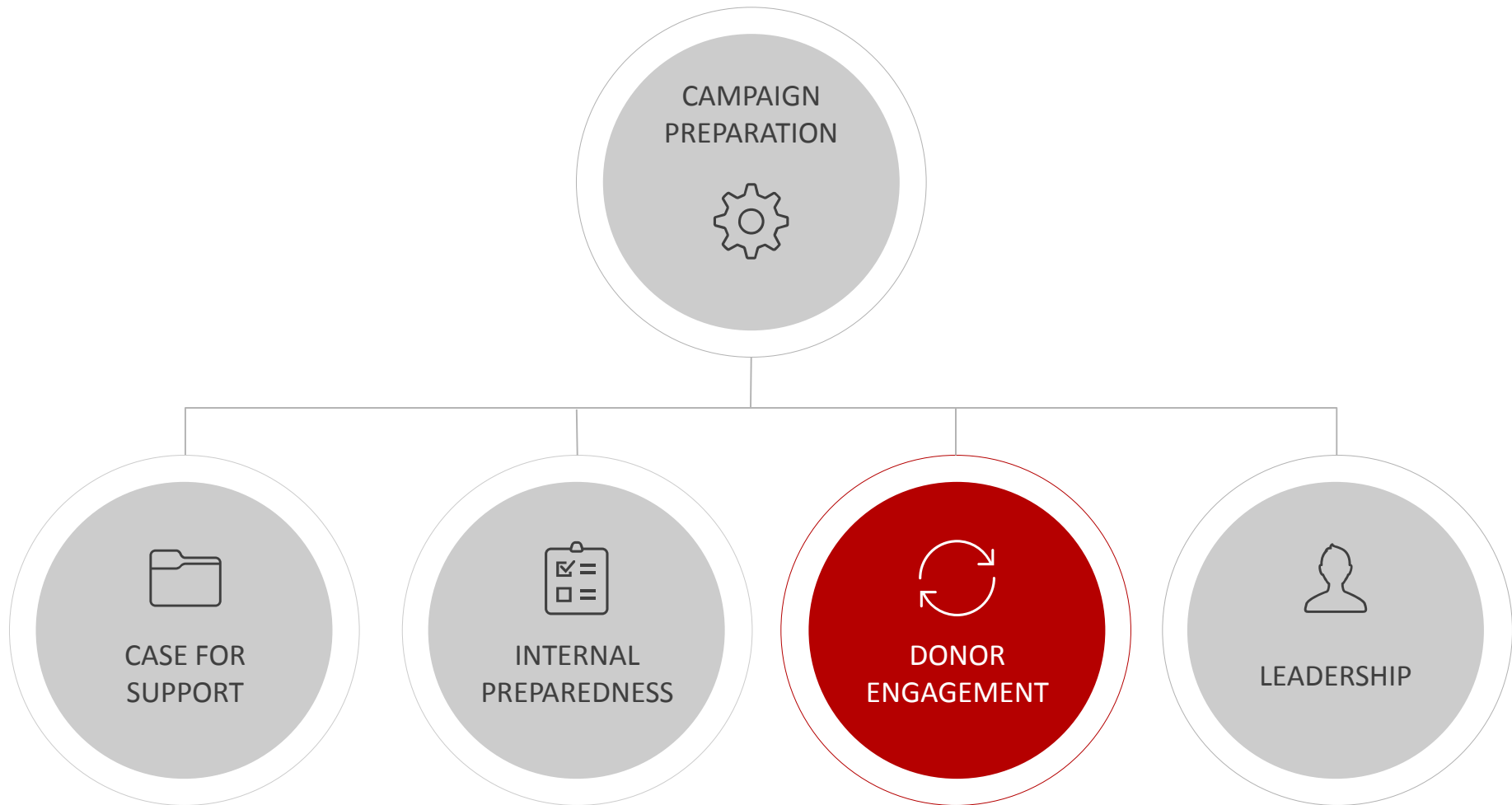


ENVIRONMENT

MAJOR GIFT AUDIT IMPLEMENTATION



DONOR ENGAGEMENT



PRE-CONCERT BRIEFINGS

WELCOME & INTRODUCTION

- Host provides personal testimonial
- Host describes purpose of meeting (provide feedback)

CAMPAIGN PRESENTATION

- Simon Woods SSO's plans for the future
- Review of campaign case

GROUP DISCUSSION

- MGO and Musician guides discussion
- Personal feedback forms provided for participants

HOUSE PARTIES, JEFFERSONIAN DINNERS



OPPORTUNITY STILL ABOUNDS



**RIGHT
STAFF**

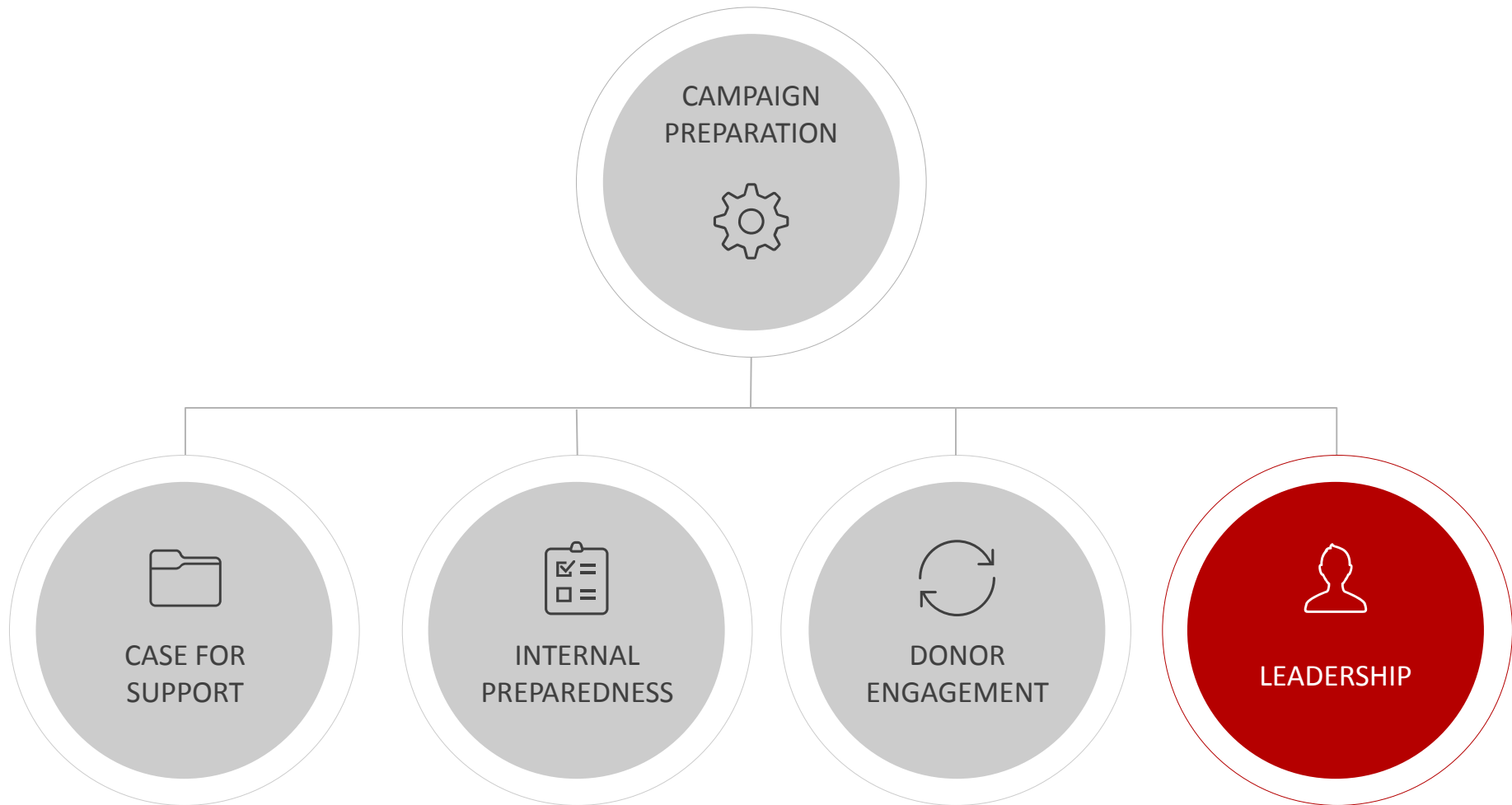
**RIGHT
PROCESSES**

**RIGHT
METRICS**

**ENGAGED
VOLUNTEERS**

**BOUNDLESS
OPPORTUNITY**

BUILDING THE PLANE WHILE FLYING IT



BOARD APPROVAL

A photograph of two hands shaking in a firm grip, symbolizing agreement or partnership. The background is a blurred window with a grid pattern. Two white circles are overlaid on the handshake. The left circle contains the text '5-YEAR CAMPAIGN' and the right circle contains the text '\$100MM GOAL'. At the bottom of the image, the text '9 Months into Planning' is written in a large, white, sans-serif font.

**5-YEAR
CAMPAIGN**

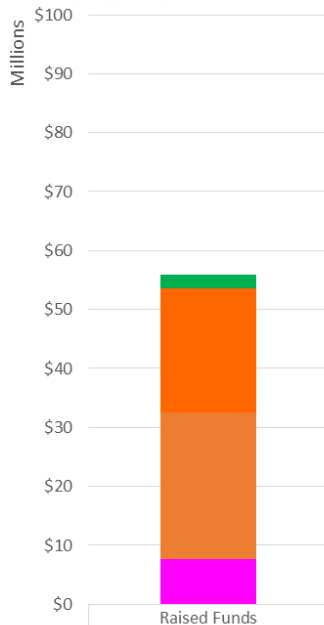
**\$100MM
GOAL**

9 Months into Planning

THINGS TICK ALONG NICELY

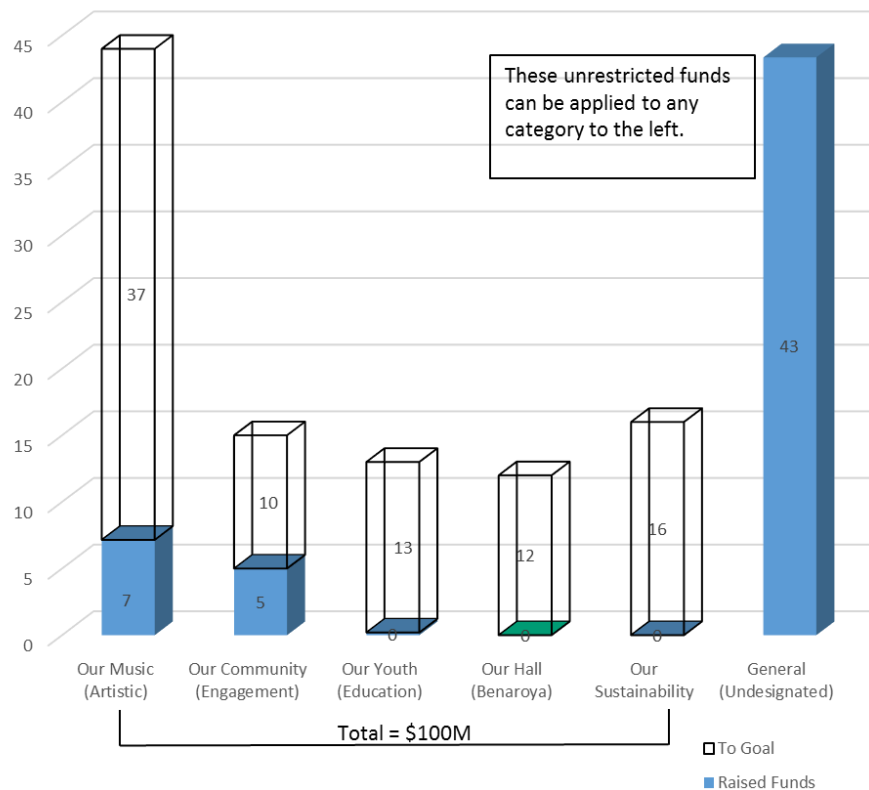
Sept '13 – Sept'15

Total Raised for the Campaign by Fiscal Year

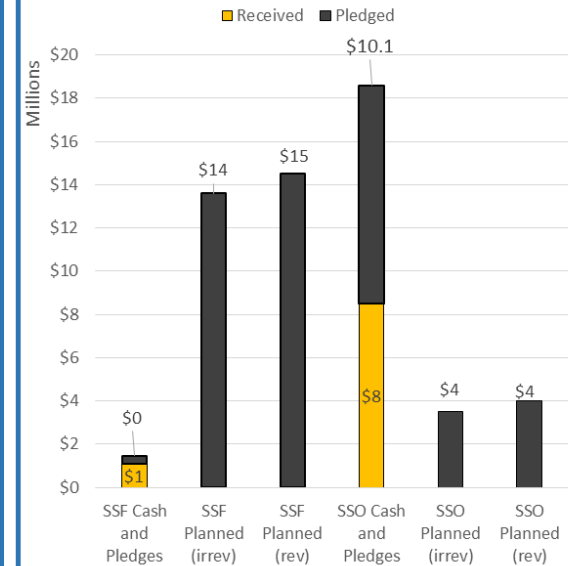


Raised Funds	
Total	\$55,903,444
FY16 YTD	\$2,322,766
FY15	\$21,103,654
FY14	\$24,727,024
FY13	\$7,750,000

Campaign Progress by Purpose (in Millions)



Type of Funds Raised for the Campaign



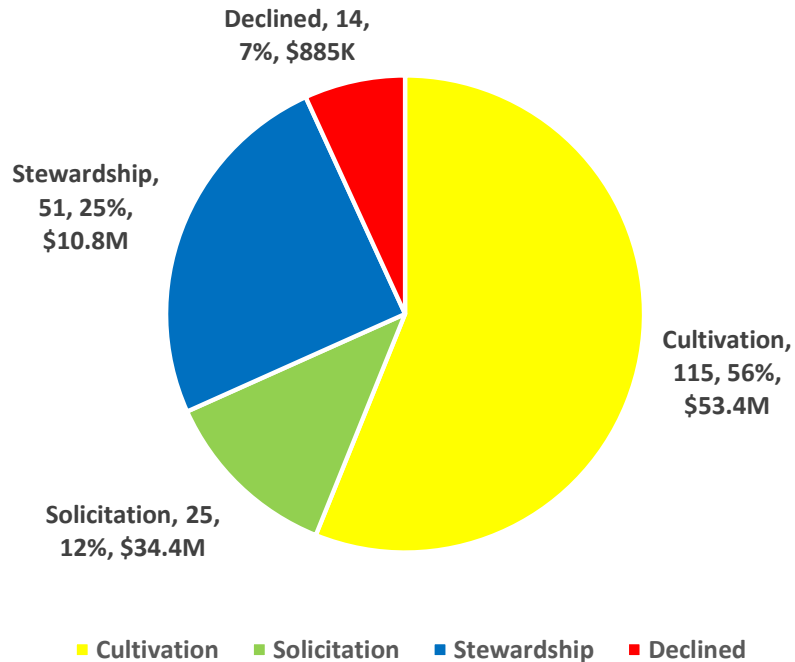
- SSO Board commitments to date:
 - Closed gifts 30%
 - Solicited 25%
 - To be solicited 45%

BOARD CAMPAIGN TASK FORCE

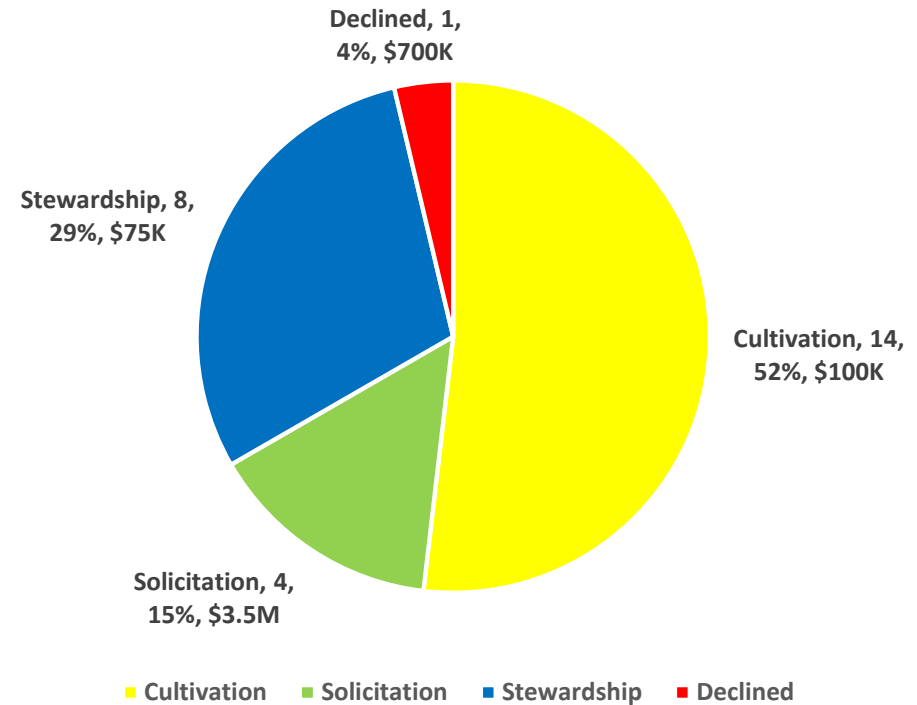


SOLICITOR DASHBOARD

**All Cabinet/BCTF Assigned Prospects By Status
Since 1/31/16**



John Smith - Portfolio Progress by Status



SOLICITOR DASHBOARD

Step Report

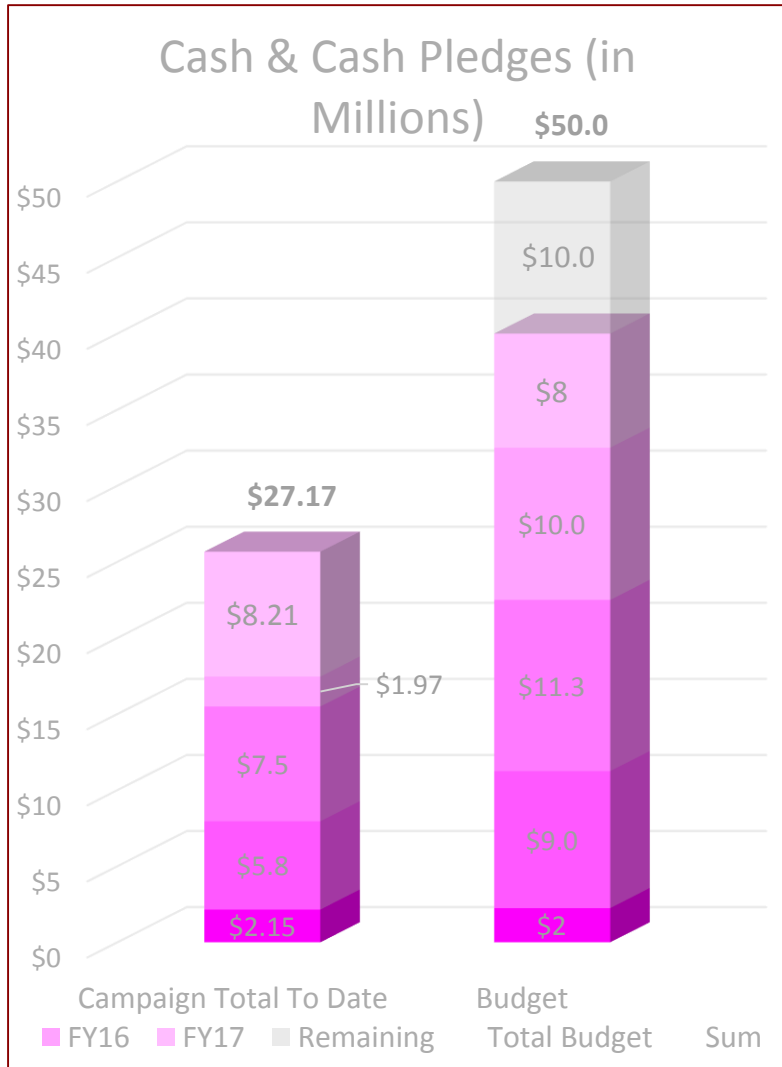
Name	Step	Due	Step	MGO
David Jones	Tom to reach out to David about purchasing Gala tickets.	2/28/2017	Tom Smith	Jane Hargraft
Sarah Farmer	Tom will ask for a meeting and ask for a Campaign gift.	3/15/2017	Tom Smith	Jane Hargraft
ABC Inc.	Tom to set up meeting with ABC for Campaign ask.	4/01/2017	Tom Smith	Jane Hargraft

SOLICITOR DASHBOARD

Portfolio Report

Name	Status	Low	High	Given	Priority	MGO
David Jones	Cultivation	\$25,000	\$50,000		Top	Jane Hargraft
Sue Deery	Cultivation	\$10,000	\$25,000		Next	Jane Hargraft
Alan Winter	Stewardship	\$5,000	\$10,000	\$7,500		Jane Hargraft

WHERE WE ARE TODAY - \$75.1M



LOOKING AT IT ANOTHER WAY

	DECEMBER 2015	MARCH 2017
SSO Board Participation	30% (14/47)	77% (40/52)
Cash and Cash Pledges	\$19.0M	\$27M
Planned Gifts	\$37.0M	\$48M
Campaign Total	\$56.0M	\$75.2M

LESSONS LEARNED



You can **fly the plane** while building it



Understand your **cash needs**



Invest in staff and processes **up front**



Don't be afraid to course correct



Engage volunteer leadership and spread out

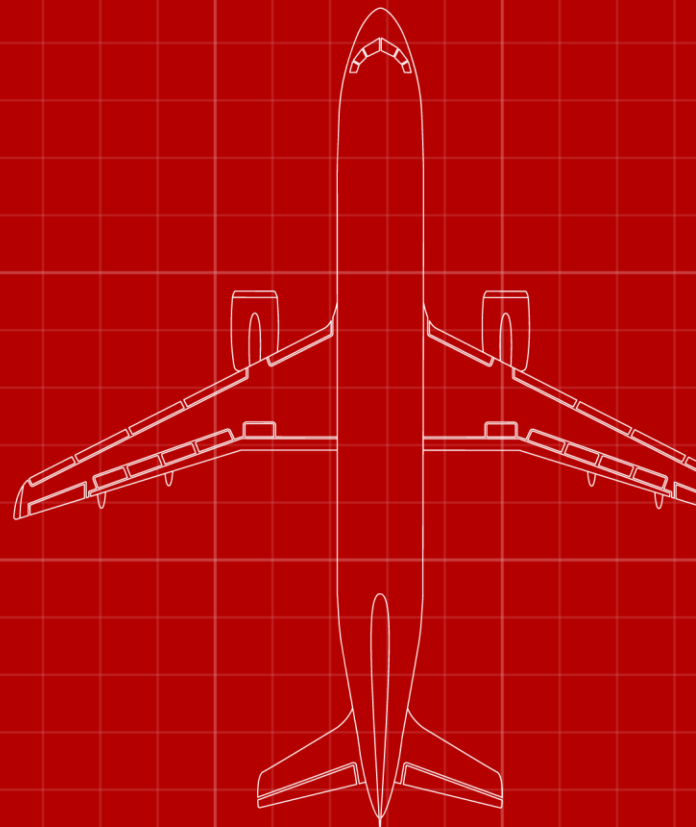


Listen to your counsel – that's why you have them!

Campbell & Company



QUESTIONS?



ADDITIONAL QUESTIONS? CONTACT US



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