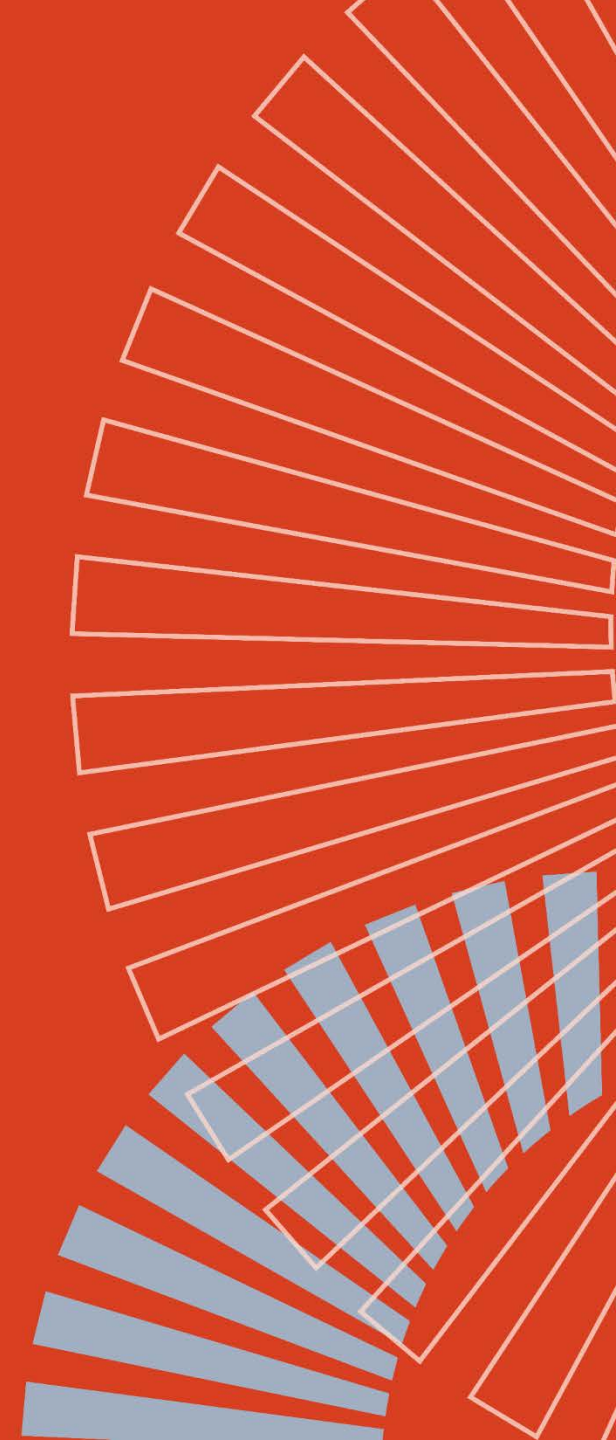




Habitat
for Humanity[®]
Chicago

Campaign Planning Study Report
August 2023



HABITAT FOR HUMANITY CHICAGO*

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* “Habitat Chicago” is used in lieu of the full name “Habitat for Humanity Chicago” in this report.

Note: [Hyperlinks](#) are embedded throughout to support navigation of this report.



METHODOLOGY

CAMPAIGN PLANNING FRAMEWORK


1

CONTEXT

No campaign exists within a vacuum. Internal factors and the external climate set the context for Habitat for Humanity Chicago's campaign and must be considered when determining strategy.

2

CAMPAIGN STRATEGY

To be successful, a campaign needs an overarching strategy that details a feasible goal and timeline and articulates the investment necessary.

3

CASE FOR SUPPORT

The campaign's vision and impact must be clear and compelling and communicate a strong rationale for the funding priorities. The philanthropic case must be made for investing in Habitat Chicago and its vision for the community.

4

LEADERSHIP

A campaign requires visible leaders willing to champion the effort, make connections, solicit gifts, and advise on strategy. Leadership comes from top staff and Board members, augmented by others committed to the campaign.

5

DONOR ENGAGEMENT

At all stages of the campaign, a commitment to relationship-based, donor-centered fundraising is essential. A strong base of donors must be ready to engage in and support the effort with leadership gifts.

6

STAFFING AND SYSTEMS

Staffing and systems must be in place to support volunteer leaders, manage donor relationships, and track and report on a higher level of development activity.

CAMPAIGN PLANNING PROCESS*



- ✓ Reviewed materials related to fundraising operations and plans

- ✓ Conducted 13 internal interviews

- ✓ Facilitated 7 case development interviews and 1 case workshop

- ✓ Drafted campaign preview, summarizing the case for support for Habitat Chicago

- ✓ Reviewed and refined preview with Campaign Planning Committee (CPC)

- ✓ Conducted a database review

- ✓ Conducted a Capacity, Portfolio, and Pipeline Analysis**

- ✓ Engaged 31 campaign prospects in one-on-one conversations

- ✓ Facilitated 2 leadership briefings with key stakeholders

- ✓ Developed and delivered a comprehensive fundraising strategy report to the Campaign Planning Committee and the Board

**See [Appendix A](#) for a full list of study participants. **See [Appendix D](#) for the full Capacity, Portfolio, and Pipeline Analysis report.*

WHAT WE TESTED

A \$15M CAMPAIGN TO FUND HABITAT CHICAGO'S NEIGHBORHOOD INVESTMENTS OVER THE NEXT THREE YEARS



EXPAND WORK ON THE WEST SIDE (\$12M): Build 30 houses, 6 in Austin



REHAB & REPAIRS PROGRAM (\$2.5M): Rehab 8 homes and fund 44 repair projects



RESIDENTS SHAPING COMMUNITIES ON THEIR OWN TERMS (\$500,000):
Neighborhood grants for neighborhood-led projects

Campaign Vision Proposed in the Study:

This campaign is crucial to support the scaling and growth of our work, and our \$15 million campaign will fund the neighborhood investments we plan to make over the next three years. We'll expand the work we already perform on Chicago's South Side in West Pullman and Greater Grand Crossing to the West Side in Austin, add a brand-new repairs program to increase home longevity and safety, and level up our commitment to help residents bring their collective vision for their own neighborhoods to fruition.

TESTED GIFT PROFILE: \$15 MILLION



Level	Gifts Needed	Qualified Prospects Needed	Subtotal	Cumulative \$	Cumulative %
\$5,000,000* Ideal	1	1	<i>not counted in totals</i>		
\$2,500,000	1	3	\$2,500,000	\$2,500,000	17%
\$1,000,000	3	9	\$3,000,000	\$5,500,000	37%
\$500,000	6	18	\$3,000,000	\$8,500,000	57%
\$250,000	8	24	\$2,000,000	\$10,500,000	70%
\$100,000	15	45	\$1,500,000	\$12,000,000	80%
\$50,000	25	75	\$1,250,000	\$13,250,000	88%
\$25,000	40	120	\$1,000,000	\$14,250,000	95%
\$10,000	50	150	\$500,000	\$14,750,000	98%
Various	Many	Many	\$250,000	\$15,000,000	100%
Total Gifts	148	444			



CONTEXT

No campaign exists within a vacuum. Internal factors and the external climate set the context for Habitat For Humanity Chicago's campaign and must be considered when determining strategy.

CONTEXT: INTERNAL FACTORS

STRENGTHS

- The Habitat for Humanity **brand is recognizable and trusted**.
 - The Habitat volunteer model is well-known and provides appealing engagement opportunities for individuals and corporations.
 - The outcomes are uniquely tangible and visible, and the idea of building homes “from scratch” is compelling.
- Habitat Chicago’s **Board and close supporters understand and are passionate about what the organization does**.
- **Executive Director Jennifer Parks is well-respected** by those who know her and trusted to lead Habitat Chicago and this campaign.
- **Habitat Chicago’s neighborhood-based programming**, and the problems it addresses, **resonate** with supporters and prospects, **and differentiate** Habitat Chicago within the larger Habitat for Humanity affiliate ecosystem.
- **The new strategic plan is well-articulated** and shows a focused approach.

*“A Habitat build is the perfect way to engage folks.” **

“Jen is a strength. She’s well-connected, passionate, and committed to the mission.”

“It’s an impressive strategic plan to transform Habitat Chicago’s [work].”

*Unattributed quotations used throughout this report are drawn from a variety of study interviews and represent opinions that were consistently expressed. Some are edited for length and clarity.

CONTEXT: INTERNAL FACTORS

CHALLENGES TO CONSIDER

- While supporters have passion for Habitat Chicago’s work, **their giving is not commensurate with these expressed feelings.**
- Habitat Chicago has an emergent major gifts program, and the donor pipeline needs to be strengthened through a thorough qualification and cultivation process.
- Some study participants exhibited **a lack of familiarity** with the Habitat Chicago leadership, staff, and Board.
- Individual supporters who haven’t been deeply engaged and/or haven’t interacted with leadership tend not to have a strong grasp of **what the organization does beyond house builds, e.g., homeownership preparation for house recipients and other homeowners, as well as about the builds themselves** (service areas, costs, the lending procedure, the impact, etc.)
- Though the strategic plan has been well-received overall, **there is a desire for more information about how the components of the plan not funded by the campaign will be resourced—i.e., where the non-philanthropic funds will come from.**

“Habitat could model other organizations with more established stewardship plans [with] a human connection.”

“They do a good job... but I sometimes struggle to see the path the team wants to take.”

“Where is the \$15M [campaign goal] in relation to the \$42M entire project? Who is filling the rest of the wheel?”

CONTEXT: EXTERNAL FACTORS

OPPORTUNITIES

- The campaign will increase visibility of Habitat Chicago’s work, and understanding of how it fits into the larger context of affordable housing work.
- There is an extraordinary level of civic interest in Habitat Chicago’s efforts on Chicago’s Southwest side.
- Habitat Chicago has an opportunity to deepen its philanthropic investments from corporate and foundation supporters—especially those who have been exclusively engaged in builds.
- Donors have expressed a desire to come together around their shared interests in the work Habitat does and the problems it addresses, and a campaign presents a prime vehicle for connection and education along those lines.
- Habitat Chicago can likely explore partnerships with the City and Mayor Johnson.
 - Several participants brought up Invest South/West and the strong parallels between the city's focus areas and those addressed in the strategic plan.
 - Depending on the new administration’s plans, Habitat Chicago might be able to tap into local government funding for some of its work, and to build credibility with donors and other potential partners through affiliation with the City.

“If they were able to leverage the work they’re doing, you’d see it’s not just the physical house they’re concerned with – it’s being able to help homeowners be best positioned for homeownership.”

“I’d like to see Habitat define its place...in the greater ecosystem of care.”

“Chicago is ripe for partnerships with the city...get Mayor Johnson’s support and community buy-in.”

CONTEXT: EXTERNAL FACTORS

THREATS

- Uncertainty about the overall Habitat for Humanity financial model has grown.
 - Multiple participants found Habitat house costs concerningly high, in many cases because they did not understand that Habitat functions as the lender and that mortgages impact the organization’s cash flow.
 - There is concern that building and material costs will continue to rise and could outpace the funding needs currently outlined in the campaign and strategic plan.
 - Since donors are increasingly concerned with maximizing their financial impact, they may require additional education about the relationship of cost to impact (i.e., why a costlier model may be necessary to achieve the results that only Habitat can deliver), and/or any plans to reexamine or adapt the model.
- There is also some confusion about Habitat for Humanity’s affiliate model.
 - Many donors don’t have a strong grasp on Habitat Chicago’s defined service area, or how it connects to and/or is distinct from other local and regional affiliates.
 - Since the Chicago affiliate in its current form is relatively young, there isn’t as much data about outcomes to leverage compared to longer-running organizations and Habitat For Humanity affiliates.
- Several interviewees cited **economic concerns** that may affect giving.

“The Habitat model is a wonderful vehicle for creating relationships. It is not the most efficient way of building.”

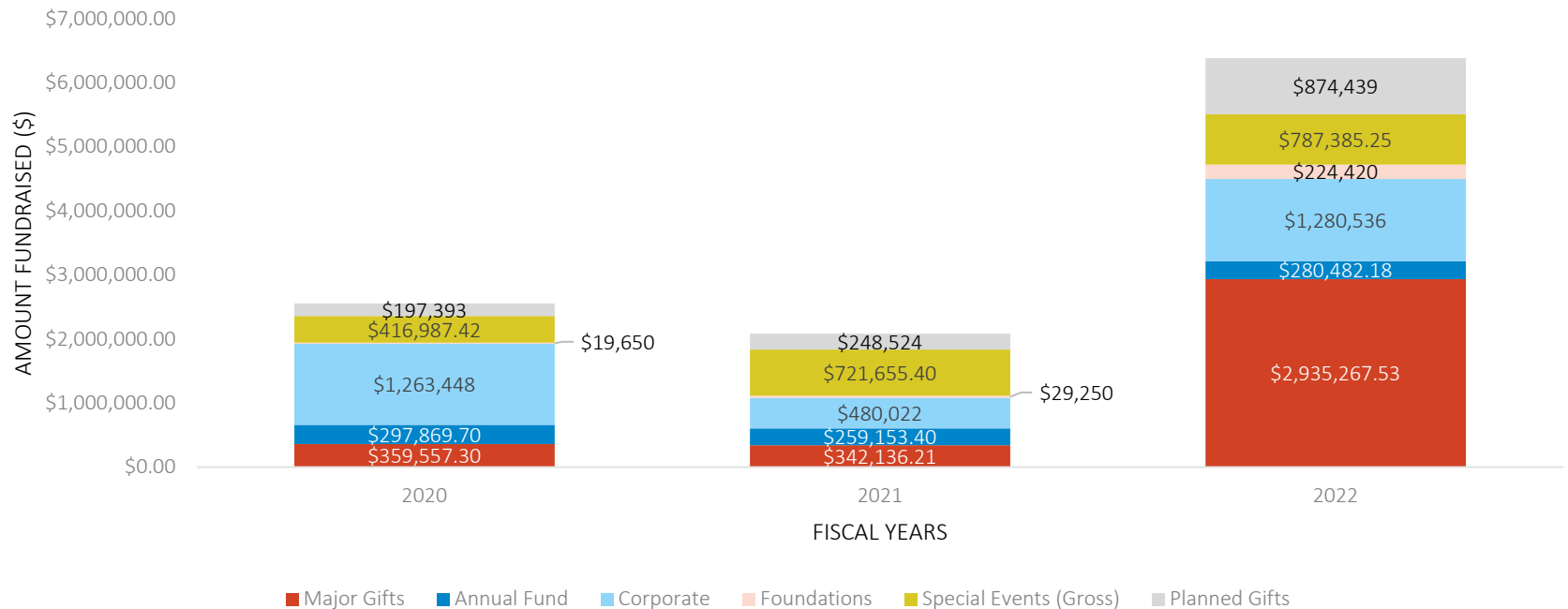
“People may be confused with Habitat Chicagoland, and local and international Habitat.”

“Competition is a factor, and everybody has to recover post-pandemic in this tight economy.”

CAMPAIGN CONTEXT

FUNDRAISING HISTORY

FUNDRAISING RESULTS, FY20-22



Historically, Habitat Chicago has received the majority of its contributed revenue from corporate donors. Recently, leadership gift support from philanthropist MacKenzie Scott, investment in building out the organization's individual giving staff and systems, and appetite from leadership to pursue ambitious goals to scale the organization's work have inspired and mobilized major individual and foundation giving efforts.



CAMPAIGN STRATEGY

To be successful, a campaign needs an overarching strategy that details a feasible goal and timeline and articulates the investment necessary.

Campbell & Company recommends moving forward with a four-year campaign with a working goal of \$10 million.

If strategic benchmarks related to infrastructure development, leadership gifts, and pipeline development are met successfully, a \$15 million goal may be feasible.

Move forward with a modified campaign over the course of four years, including an initial preparation and leadership gifts phase.

The study revealed significant interest in and enthusiasm for a campaign but did not confirm sufficient high-level support to suggest a \$15 million goal is attainable at this time.

A thoughtful campaign framework, supported by an adjusted working goal and longer timeline, can provide Habitat Chicago the time and space to focus on building its major gift program and moving prospects closer to readiness to make larger gifts. **Habitat Chicago has many factors working in its favor that led to the recommendation to take on a campaign**, including the power and relevance of its mission in Chicago; the deep affinity for and connection with the organization; willingness to support a campaign with a gift among most interviewees; its strong leadership; and its focused, forward-thinking, compelling strategic plan.

To meet a campaign goal of \$10 million, Habitat Chicago will need to **meaningfully grow its major giving through a two-year joint Preparation/Leadership gifts phase, securing several pace-setting gifts at the seven-figure level and achieving a Board give/get goal.**

The **campaign goal should be evaluated and confirmed at the end of the leadership gifts phase** based on the level of lead gifts secured, engagement of volunteer leadership, and the pipeline of qualified major donors, among other benchmarks.

CAMPAIGN STRUCTURE

The following two slides provide an overview of key activities and benchmarks by campaign phase, which we expand on in the remainder of the report.

PREPARATION & LEADERSHIP GIFTS PHASE

→
24 months: January 2024 – December 2025

ACTIVITIES:

- Refine the case for support based on study feedback and develop donor-facing campaign materials
- Begin a "civic blitz" strategy to build Habitat Chicago's brand, positioning Jen as the face of the campaign and kickstarting additional corporate and foundation prospect cultivation
- Recruit 1-2 campaign Co-Chairs and 4-6 additional Campaign Steering Committee members
- Recruit a small Advisory Council of community partners, civic leaders, and real estate/development experts to support strategic plan implementation and achievement
- Hire recommended staff and realign Development team roles and responsibilities to support increased fundraising activity
- Rebalance portfolios based on new roles and the findings of the Capacity Analysis, to ensure top campaign prospects are under active management
- Create and adopt campaign policies and procedures, including campaign counting, recognition and naming policies, and campaign reporting mechanisms
- Solicit Board and adopt a Board give/get campaign goal, aiming for 100% participation and contributions that reflect Habitat Chicago as a top philanthropic priority
- Focus staff on qualification and cultivation of top ~100 prospects
- Secure leadership gifts (\$100K+), prioritizing 7-figure asks
- Evaluate campaign progress to confirm campaign fundraising goal

Secure 60-70% of campaign goal

CAMPAIGN STRUCTURE

MAJOR GIFTS PHASE

12 months: January 2026 – December 2026

ACTIVITIES:

- Continue to secure leadership gifts, as identified
- Cultivate and solicit major gifts (\$25,000+)
- Host strategic cultivation events—both smaller cultivation events and larger engagement events
- Begin preparations for public launch
- Develop a community phase campaign communications strategy
- **Secure 80-85% of the total campaign goal**

COMMUNITY PHASE

12 months: January 2027 – December 2027

ACTIVITIES:

- Continue and complete leadership and major gift cultivation and solicitation
- Announce and promote the campaign broadly through all communication channels
- Solicit gifts from the entire Habitat Chicago donor community
- Thank and steward all donors
- Hold campaign celebration event
- **Secure 100% of goal and celebrate success!**

Move forward with a Preparation/Leadership Gifts Phase that culminates in a campaign goal decision based on progress toward benchmarks.

First Year Benchmarks to Confirm Campaign Goal:

- ✓ Raise \$2.5M through a Board campaign give/get goal (including 100% Board participation)
- ✓ Qualify 40-50 prospects at the \$100,000+ level
- ✓ For a \$10M campaign goal:
 - Secure at least \$2.5M in leadership gift commitments (gifts of \$100K+)
- ✓ For a \$15M campaign goal:
 - Secure at least \$4M in leadership gift commitments (gifts of \$100K+)

Second Year Benchmarks to Confirm Campaign Goal:

- ✓ Qualify an additional 50-60 prospects at the \$100,000+ level
- ✓ For a \$10M campaign goal:
 - Secure at least \$6M in leadership gift commitments (gifts of \$100k+)—and have \$6M in the pipeline by the end of the Preparation/Leadership Gifts Phase
- ✓ For a \$15M campaign goal:
 - Secure at least \$10M (gifts of \$100k+)—and have \$7.5M in the pipeline by the end of the Preparation/Leadership Gifts Phase

CAMPAIGN STRUCTURE

For a \$10 million to \$15 million campaign goal, pursue a strategic distribution of gifts informed by the Capacity Analysis.

GIFT TABLE FOR \$10M CAMPAIGN GOAL

Level	Gifts Needed	Qualified Prospects Needed	Subtotal	Cumulative \$	Cumulative %	Identified Prospects
\$2,000,000	1	3	\$2,000,000	\$2,000,000	20%	9
\$1,000,000	2	6	\$2,000,000	\$4,000,000	40%	25
\$500,000	3	15	\$1,500,000	\$5,500,000	55%	65
\$250,000	5	30	\$1,250,000	\$6,750,000	68%	170
\$100,000	10	45	\$1,000,000	\$7,750,000	78%	495
\$50,000	15	60	\$750,000	\$8,500,000	85%	658
\$25,000	30	90	\$750,000	\$9,250,000	93%	47
\$10,000	50	150	\$500,000	\$9,750,000	98%	42
Various	Many	Many	\$250,000	\$10,000,000	100%	2,147
Total Gifts	116	399				3,658

CAMPAIGN STRUCTURE

For a \$10 million to \$15 million campaign goal, pursue a strategic distribution of gifts informed by the Capacity Analysis. (Continued)

GIFT TABLE FOR \$15M CAMPAIGN GOAL

Level	Gifts Needed	Qualified Prospects Needed	Subtotal	Cumulative \$	Cumulative %	Identified Prospects
\$5,000,000*	1	1	<i>Ideal, but not counted in totals</i>			4
\$2,500,000	1	3	\$2,500,000	\$2,500,000	17%	2
\$1,000,000	3	9	\$3,000,000	\$5,500,000	37%	28
\$500,000	6	18	\$3,000,000	\$8,500,000	57%	65
\$250,000	8	24	\$2,000,000	\$10,500,000	70%	170
\$100,000	15	45	\$1,500,000	\$12,000,000	80%	495
\$50,000	25	75	\$1,250,000	\$13,250,000	88%	658
\$25,000	40	120	\$1,000,000	\$14,250,000	95%	47
\$10,000	50	150	\$500,000	\$14,750,000	98%	42
Various	Many	Many	\$250,000	\$15,000,000	100%	2,147
Total Gifts	148	444				3,658



CASE FOR SUPPORT

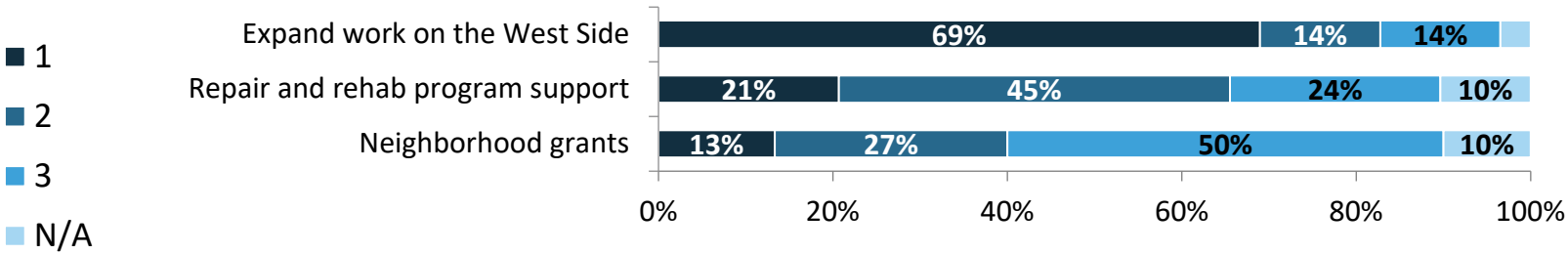
The campaign's vision and impact must be clear and compelling and communicate a strong rationale for the funding priorities. The philanthropic case must be made for investing in Habitat for Humanity Chicago and its vision for the community.

CASE FOR SUPPORT: FINDINGS



- Study participants wanted more information to connect the campaign goals, priorities, and timelines of the campaign and the strategic plan. Many study participants seemed confused by the different scopes and metrics and sought clarity about how they relate to one another.
- The priorities tested in the study were well received, though the structure and specifics may not have resonated to their full potential. As we refine the case, we can adjust the presentation of the priorities that generated less initial interest, emphasize those that participants gravitated towards, and present them all in a balanced format.
 - Expanding the work to Chicago’s West Side in Austin and building more homes were **the most important priorities** for interviewees.
 - The **balance of funding and delineation of specific activities within the priorities** caused some confusion.
 - There is a desire for clearer definitions and examples of “rehabilitation” vs. “repairs.”
 - Some participants noted the sizable difference in costs between the priorities and reflected on how that variance sends a message about which priorities are more or less important.

“Please rank the following proposed campaign priorities, with 1 indicating the priority you feel is most important for advancing Habit Chicago's mission and 3 indicating the priority you feel is least important.”



Clarify the case for support and its connection to the strategic plan, and determine how best to tell the story of Habitat Chicago's impact.

- Ensure that the **specifics of the campaign** and **how it will support the strategic plan** are clearly outlined.
 - Articulate what parts of the plan the campaign is supporting, and how annual giving and other revenue streams will support the rest of the strategic plan.
 - Adjust the numbers for the campaign priorities to reflect the \$10 million working goal and discuss what the additional \$5 million would fund if the goal is eventually raised to \$15 million.
 - Share the scaled impact the strategic plan is meant to bring about, beyond new home construction.
 - What are the proof points in neighborhoods that show impact? How do particular areas look and feel different because of Habitat Chicago's work, and what additional changes can we expect to see as Habitat Chicago scales?
 - How do Habitat Chicago's other services connect to and amplify the impact of new home construction? What will building 30 houses per year and expanding programming do that six houses per year and the current programming cannot?
 - What impacts will Habitat's scaling have on homebuyer education, and how do those services factor into the "ripple effect" of Habitat's work?
- Clarify the context around target neighborhoods, as well **the real-world impact** Habitat Chicago's work has on the communities it serves.
 - Leverage the solid data around housing in Chicago and how the racial wealth and homeownership gap have grown/are growing.
 - Supplement limited organizational data by building the case around real stories of people and neighborhoods.

Use the case for support as an opportunity to clarify misunderstood aspects of how Habitat Chicago operates.

- Use the case to clarify and educate about **Habitat Chicago's work** and **how the campaign will accelerate it**.
 - Differentiate what Habitat Chicago does in comparison to and in conjunction with other affiliates.
 - Clarify the Chicago model and neighborhood approach—and provide specific examples that show why they work.
 - Delineate Habitat Chicago's specific service area, and if/how it works with nearby affiliates.
 - Share the specifics of Habitat Chicago's authentic approach to partnerships, especially in materials for an institutional funder audience.
 - Point to community partners in West Pullman and Greater Grand Crossing as examples.
 - Prominently feature Habitat Chicago's partnership with Austin Coming Together in materials about the expansion to the West Side.

*“What are the metrics that differentiate target neighborhoods from others?
What is the lifecycle of Habitat's impact on those communities?”*

“Strategic partners may help them achieve their vision more efficiently and effectively than if they try to do it by themselves.”

Create preliminary case materials to support Preparation Phase activities.

- Begin with a donor-facing **Campaign Case Statement** that builds on the campaign preview to articulate a preliminary case for support focused on the vision and revised priorities.
- Consider creating tailored, donor-facing **supplemental materials** for revised campaign priorities, other funding streams, and/or specific programs that connect to the overall vision (e.g., Homebuyer University).
- Provide in-depth **details about donor investments and how they will advance Habitat Chicago's goals and vision**, and identify recognition opportunities for lead donors.
- Make this content available to the Senior Leadership team, Development team, Board of Directors, and volunteer leaders in the form of an internal **Preparation Phase Message Platform** to serve as the source document for donor-facing materials and external communication about the campaign.
 - Having the case messaging in a single document that is available to all relevant staff and campaign ambassadors will help ensure communication consistency.
 - Use the message platform to build out other Preparation Phase materials as needed, such as presentations and donor proposals, and to promote events, share updates, and announce successes as appropriate.

Following the Preparation Phase, further refine and build out the case for support and create a full suite of flexible case materials to support campaign activities.

- To support donor engagement activities for all phases of the campaign, we recommend the following **case materials**, leveraging the revised case statement and internal message materials during Year 1 while building out a campaign brand and cultivation deck for use in Year 2.

Immediate Priorities	Updated Case Statement	Revised case for support including adjusted working goal, timeline, and priorities.
	Internal Case Materials	Campaign Message Platform to serve as the source document for all other case and donor materials; Campaign Talking Points for campaign ambassadors; Campaign FAQs to help staff answer questions about the campaign vision and priorities

Year 1 Priorities	Campaign Brand	Campaign name, key themes/messaging, and visual identity; builds on the Habitat Chicago brand while identifying the campaign as a distinct and special effort
	Campaign Cultivation Deck	Fully designed, editable PowerPoint deck; expresses a compelling narrative, campaign vision, and detailed case for support; for use in individual cultivation & group presentations

Following the Preparation Phase, further refine and build out the case for support and create a full suite of flexible case materials to support campaign activities. (Continued.)

- The following fully developed donor-facing materials will help Habitat Chicago continue to elevate the campaign and amplify the case for support.

Future Steps	Supplemental Materials	Fully designed 2-3-page supplemental materials about priorities, funding, and/or programs; provides in-depth details about campaign investments, impacts, and donor opportunities
	Campaign Brochure	Fully designed leave behind print piece; expresses the campaign vision and narrative
	Campaign Website	A distinct microsite that be broadly shared in all phases of the campaign; an opportunity to enhance digital donor engagement and online giving
	Campaign Video	A 2–3-minute narrative sharing the campaign vision, featuring diverse community voices; can be shared throughout the campaign across all communication channels



LEADERSHIP

A campaign requires visible leaders willing to champion the effort, make connections, solicit gifts, and advise on strategy. Leadership comes from top staff and Board members, augmented by others committed to the campaign.

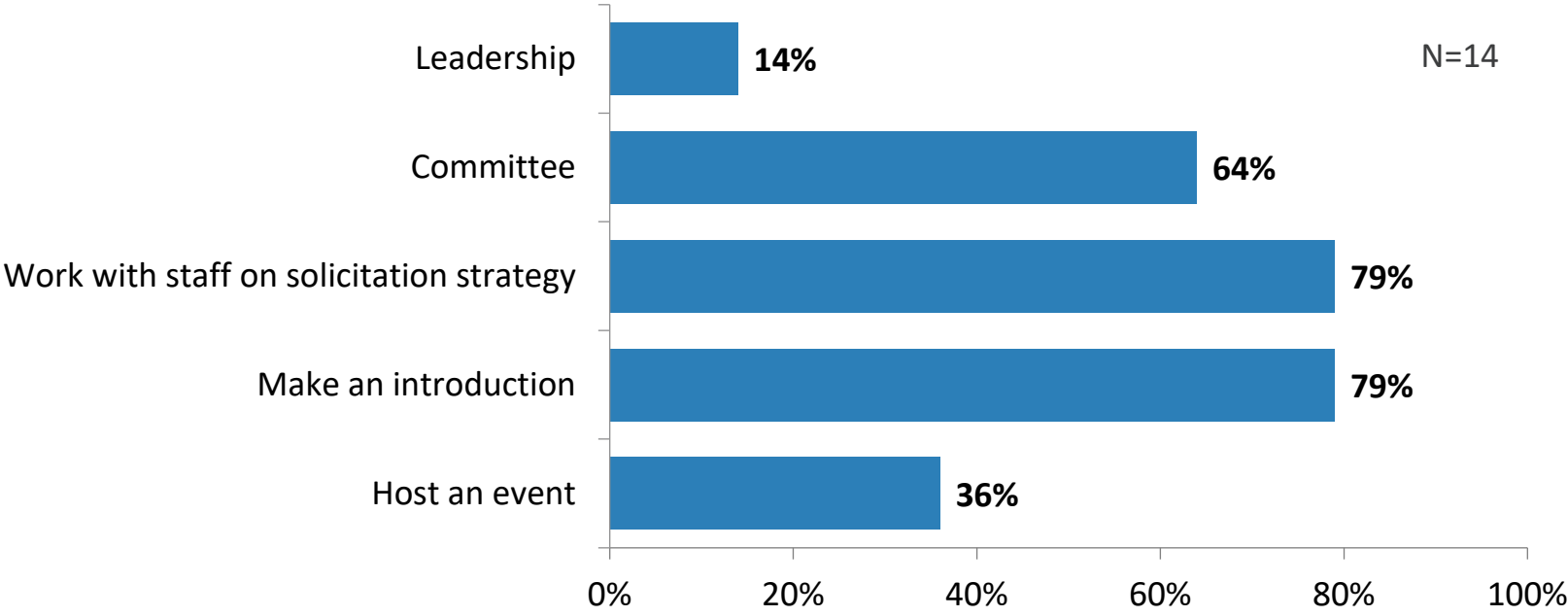
LEADERSHIP: FINDINGS



- Interviewees remarked that Jen’s leadership has transformed the organization—including by building a strong volunteer leadership group, shifting the programmatic focus to neighborhood health, and beginning to formalize philanthropic efforts.
- Many noted that Jen’s time is valuable, and she extends herself across teams.
- The Board is enthusiastic about and supportive of the campaign. They asked the right questions and conveyed passion for the work and strategic goals.
- The recent shift away from Board giving expectations will need to be considered as Habitat Chicago envisions the Board’s ability to contribute to the overall campaign goal and how Board members can support the campaign beyond personal giving—as ambassadors, advocates, and solicitors.
- Despite the absence of a formal expectation, 92% of the Board gave in 2022; among Board members we spoke to in the study, all indicated a willingness to consider a personally significant gift.

Board	\$100K+ Prospects	<\$100K Prospects	\$100K+ Future Prospects	<\$100K Future Prospects
Current Member	9	4	0	1
Former Board	6	5	0	0
Total	15	9	0	1

- Though few interviewees raised their hands for leadership roles, some showed **a willingness to support campaign efforts** by serving on committees, helping to craft solicitation strategies, and connecting Habitat Chicago to people in their networks.
 - The high interest in committee service and participation in identification and solicitation of donor prospects is encouraging.
 - While few people raised their hands for a leadership position (chair or Co-Chair of the campaign), interest in the top role is often limited at this point in the process.



Establish a strong, enthusiastic team of staff and volunteer leaders to guide fundraising efforts and prepare the Board to take an active role in fundraising.

- Prepare Jen to serve in a **more fundraising-focused role** throughout the campaign.
 - During the first two years of the campaign, Jen should be willing to dedicate up to 25-35% of her time to campaign activities.
 - The majority of Jen’s time on campaign work should be spent raising the profile of Habitat Chicago and developing relationships with key community leaders and potential partners through the “civic blitz” strategy we describe in the Donor Engagement section of this report.
 - To be successful in her role, Jen will need steady support with prospect strategy and materials preparation from Betsy and the Development team, as well as dependable administrative support to ensure her calendar is well managed and that she is appropriately prepared for meetings and presentations.
 - To maximize information gathered through Jen’s campaign activities, we recommend scheduling **30-minute weekly meetings** between Jen, Betsy, and an administrative team member specifically dedicated to donor meeting preparation and follow-up.
 - We recommend that the agendas for those meetings have two sections: a list of all the donor meetings that were on Jen’s calendar in the past week to debrief as well as a list of all the donor meetings that are scheduled for the coming week.
- Elevate **Betsy’s visibility** within the Habitat Chicago donor community.
 - In addition to staffing Jen in her campaign role, Betsy should assume a more active, frontline fundraising role throughout the campaign as Campaign Director.
 - This will require much more delegation of administrative and team management responsibilities and a significant increase in out-the-door activity.
 - Betsy’s work should focus on qualifying and cultivating prospects at the \$100K+ levels—including prospects who may ultimately be asked for a gift by Jen, but who need to be brought into the organization and thoughtfully engaged in the vision prior to solicitation.

Establish a strong, enthusiastic team of staff and volunteer leaders to guide fundraising efforts and prepare the Board to take an active role in fundraising. (Continued.)

- Engage Board members and/or other close supporters to serve in **volunteer leadership roles** for the campaign.
 - Some potential campaign leaders were recommended, and there is room to deepen the volunteer leadership bench considerably.
 - Former Board members and other past/longtime supporters may also have the potential to take on these roles.
- Determine goals for Board member campaign giving, which can be comprised of **both personal giving and securing gifts** from other sources.
 - Since Board campaign involvement—particularly at organizations embarking on their first campaign—signals internal buy-in and potential for success, we recommend exploring a scenario in which the Board collectively contributes and solicits a quarter of the campaign goal.
 - Acknowledging that Habitat Chicago has eliminated the give/get structure from annual giving, consider how to frame to the Board that aggressive fundraising goals, and Board involvement in them, are necessary for campaign success but can be adjusted to fit into Habitat Chicago’s giving culture and values. (For example, consider a message that the campaign should be a top-third philanthropic priority for all Board members.)
 - Create a giving structure that balances these ethical considerations with campaign needs, and positions this as an inclusive strategy that allows individuals who can’t make a six- or seven-figure gifts to make significant impact.
 - Plan for and provide coaching and support for Board members as they assume the roles of campaign ambassador and solicitor.

“The Board is excited and extremely supportive of this campaign...it’s also important that the Board represents and reflects the communities served.”

Assemble a Campaign Steering Committee of volunteers who can validate the campaign vision and plans, broaden Habitat Chicago's reach, and provide community input at critical stages.

- **Position a Campaign Steering Committee*** as the primary volunteer entity governing campaign strategy and execution, with a critical role in building community consensus, ownership, and investment as they:
 - Make gifts at personally significant levels that indicate Habitat Chicago as a top-3 philanthropic priority and set an example for other prospects.
 - Advise on campaign and donor-specific strategies.
 - Help identify, qualify, and open doors to prospects.
 - Play active roles in the cultivation and solicitation of campaign gifts, with appropriate staff support.
 - Participate in regular (likely bimonthly) committee meetings, as well as 1:1 portfolio and prospect strategy conversations with staff in between committee meetings.
 - Serve as spokespersons and champions for the campaign in their personal networks.
 - Liaise with and report to the Board throughout the campaign.
- **Assemble a program-focused advisory council** to assist Habitat Chicago with achieving strategic plan goals.
 - Populate this group with community organization partners, real estate and development partners, government liaisons, and/or any individuals that can offer guidance on or help bring about strategic plan priorities.

“You need that bench of people and connections.”

**See [Appendix B](#) for full Campaign Steering Committee role description.*

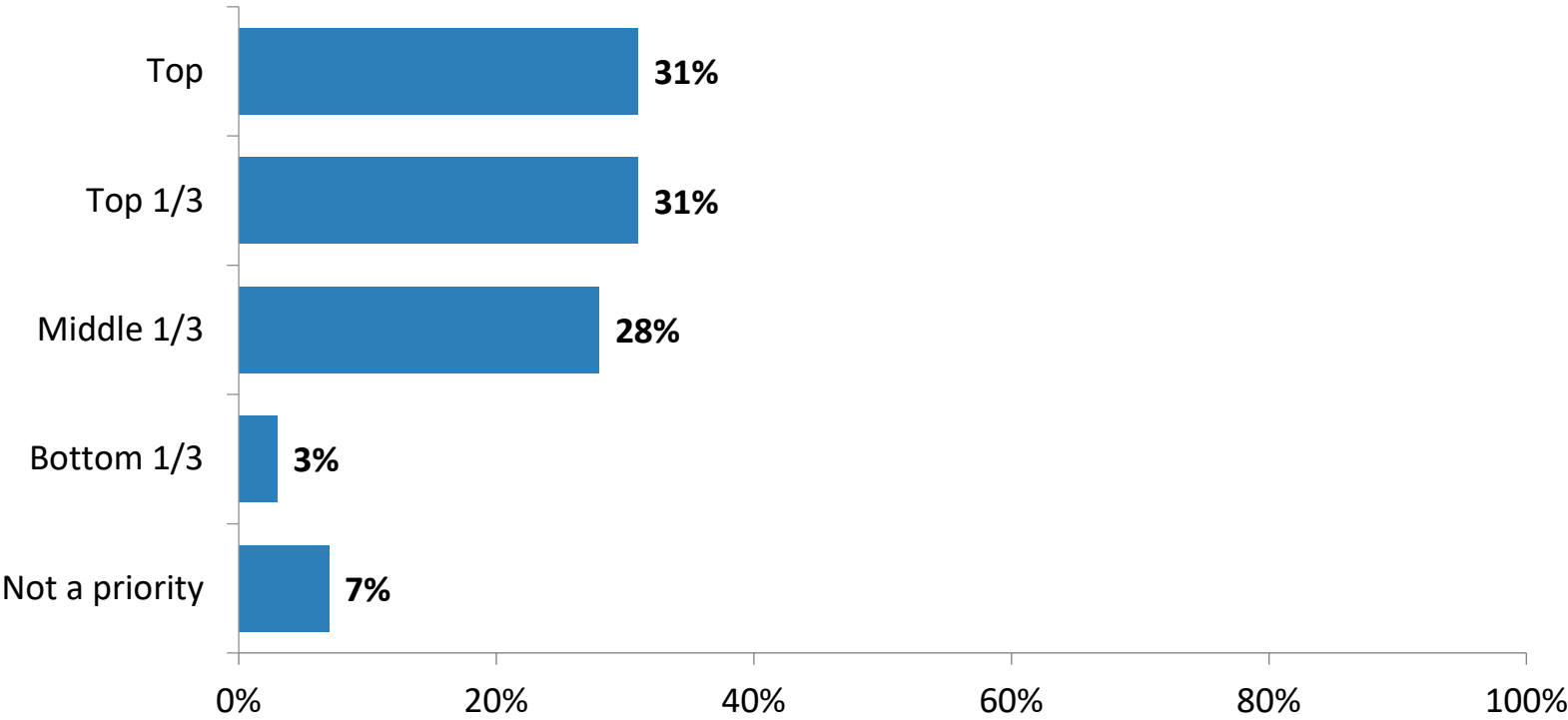


DONOR ENGAGEMENT

At all stages of the campaign, a commitment to relationship-based, donor-centered fundraising is essential. A strong base of donors must be ready to engage in and support the effort with leadership gifts.

- Nearly two-thirds of study participants ranked Habitat Chicago in their top three philanthropic priorities, with nearly one-third ranking the organization as their first priority.

“Where does Habitat Chicago rank in terms of your philanthropic priorities?”

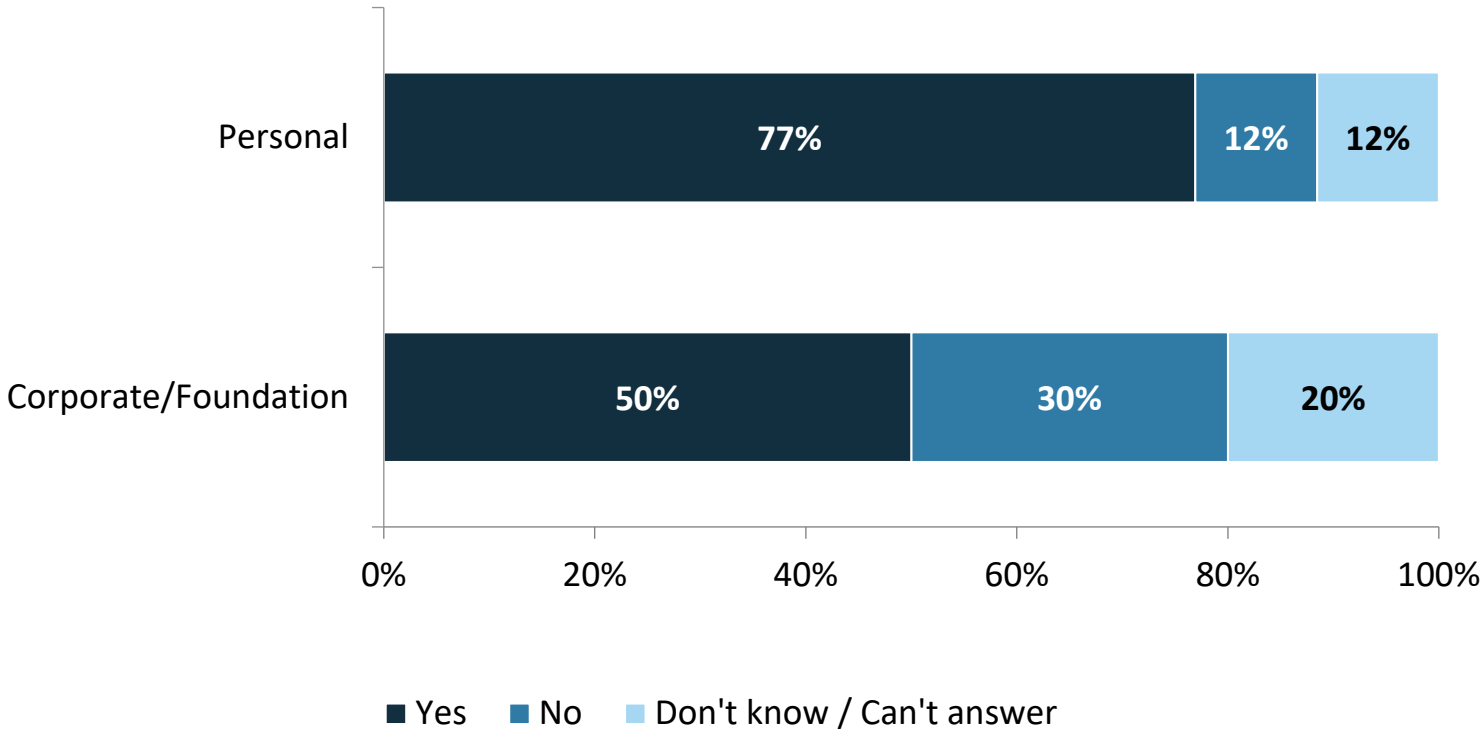


DONOR ENGAGEMENT: FINDINGS

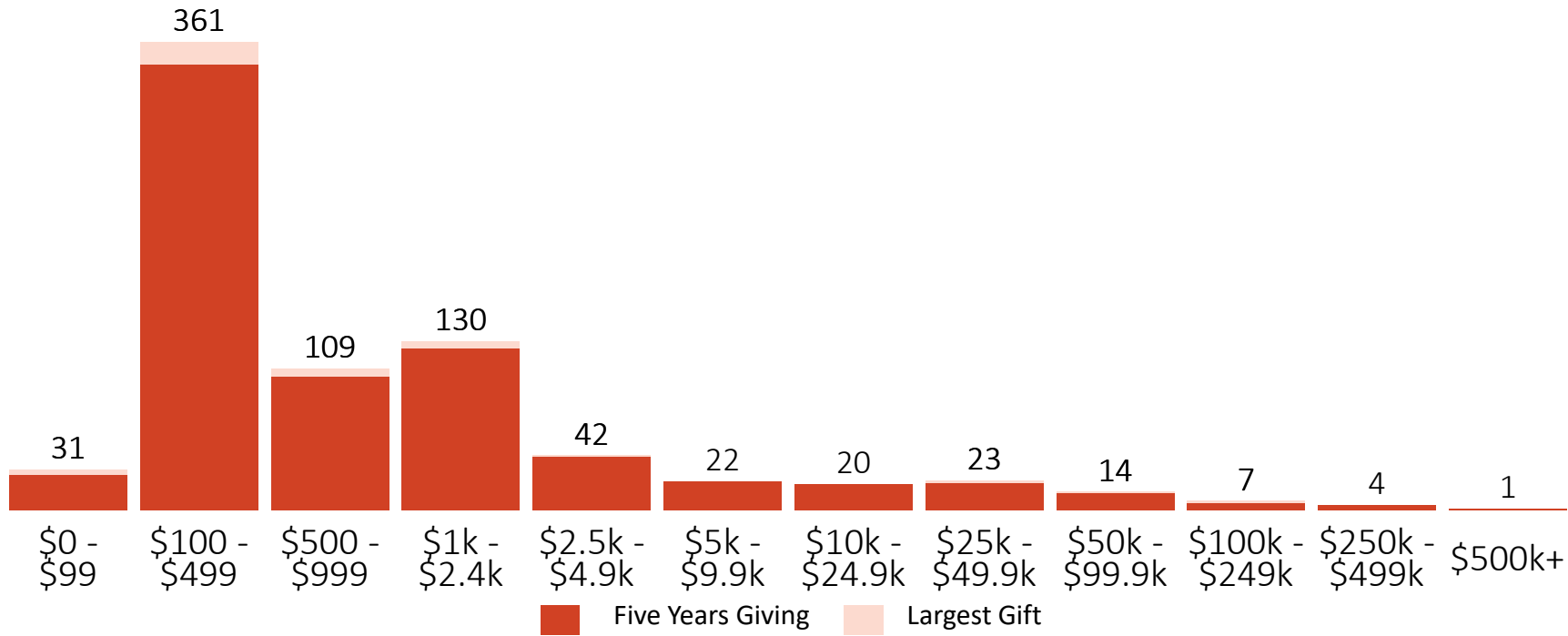


- 77% of interviewees shared they would make a personal gift and 50% shared that their corporation/foundation would make a gift to Habitat Chicago’s future campaign. Only 11% said they would not participate.

“While we are not asking you for a commitment at this time, if Habitat Chicago were to ask you for a gift or pledge today, would you and/or your company/foundation support the campaign above and beyond what you typically donate in a given year?”



TOP PROSPECTS BY LARGEST GIFT



Most Top Prospects are not giving commensurate with their capacity. This marks a significant opportunity to increase giving:

- 65.6% have not given a gift of \$1,000 or more
- 90.9% have not given a gift of \$10,000 or more

DONOR ENGAGEMENT: FINDINGS

GIFTS IDENTIFIED

- The range of gifts we identified indicated that Habitat Chicago will need to further cultivate current donors and strengthen relationships with prospects outside the core donor pool to reach the campaign goal.

- In the chart below, “interviewee stated” gifts are based on the estimates that interviewees directly shared, while “consultant estimated” gifts are based on interviewees’ capacity and known giving to other organizations, as well as conversational indications.

Potential Gifts: Interviewee Stated		
	Low	High
Individual	\$327,000	\$882,000
Corporate/Foundation	\$750,000	\$1,250,000
TOTAL	\$1,077,000	\$2,132,000

Potential Gifts: Consultant Estimated		
	Low	High
Individual	\$445,000	\$1,225,000
Corporate/Foundation	\$840,000	\$1,535,000
TOTAL	\$1,285,000	\$2,760,000

DONOR ENGAGEMENT: FINDINGS

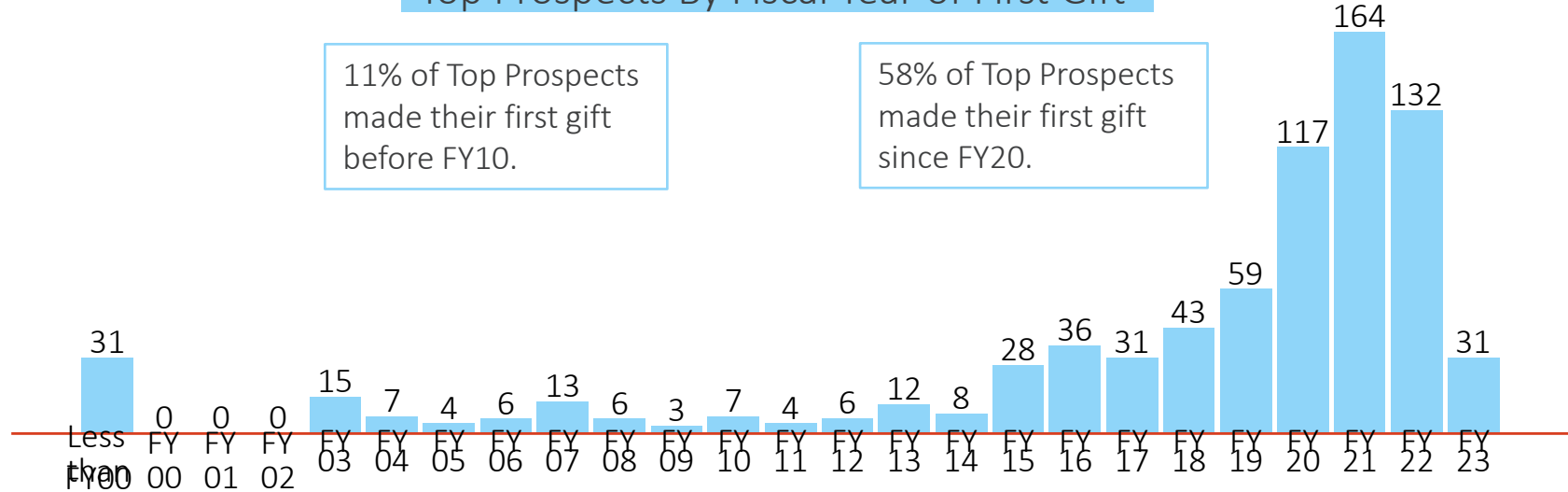


- Study participants indicated there is significant opportunity to grow corporate and foundation involvement. While individual giving often makes up the majority of campaign fundraising, Habitat Chicago's identity as a sought-after destination for corporate engagement—as well as the organization's focus on racial equity and South and West side neighborhoods—position it well to seek six- and seven-figure campaign gifts from institutional partners.

“There are a lot of businesses and companies that are untapped.”

- As is typical for organizations with nascent major gift programs, many top prospects are newer to the organization and may require **additional time to cultivate for campaign gifts.**

Top Prospects By Fiscal Year of First Gift



11% of Top Prospects made their first gift before FY10.

58% of Top Prospects made their first gift since FY20.

Immediately qualify and build strategies for Top Prospects.

- Implement the **next steps laid out in the Capacity Analysis.**
 - Once BWI and prospect status data has been uploaded, rebalance portfolios and begin to qualify major gift prospects for campaign gifts, focusing first on top prospects with \$100K+ capacity.
 - The team should also discuss opportunities to begin to engage any \$100K+ future prospects who have made a gift in the past.
 - Build out a solicitation strategy for all qualified donors, including solicitation teams, ask amounts, and case elements to emphasize and the materials to support them.
- Involve potential leadership donors in **determining the public campaign goal.**
 - Give them a stake in campaign success: as leadership funders, it's up to them to chart the course of how much can be raised.
 - A \$10 million campaign goal is attainable and will set the organization up for success.
 - A \$15 million campaign goal is a more aspirational and visionary scenario that staff and volunteer leadership would like to see realized.

Keep donors and study participants informed about and engaged in campaign details and progress.

- Follow up with study participants and encourage them to stay involved in the campaign.
 - Share the Executive Summary of the study and talk about next steps and how they fit in, potentially as ambassadors, advocates, connectors, etc.
 - Opportunities for continued involvement may include participation on the campaign committee, 1:1 work with staff to help engage a small portfolio of campaign prospects, and/or hosting or co-hosting a small group cultivation event.
- Continue to **cultivate donors and help them to develop deeper connections** with the organization. Cultivation strategies may include:
 - 1:1 visits with Jen or Betsy, especially if the donor has not had an opportunity to meet face-to-face with a staff leader. For donors who are not yet ready to be approached for a campaign gift, these could be framed as strategic plan-focused conversations, to update them on the organization's vision and direction and answer any questions they might have.
 - Personalized invitations to participate in a build, for donors who have not yet volunteered with the organization.
 - Small group cocktail or coffee receptions, which could allow for donors to meet and mingle with each other, and which could also be framed as strategic plan presentations or Q&A sessions.

Design and implement a “civic blitz” strategy to get Executive Director, Jennifer Parks, in front of a range of stakeholders.

- While top prospect cultivation will be an early priority, **it will be critical to concurrently have Jen presenting to a range of stakeholders** to build broader visibility and engagement, and to qualify additional campaign prospects.
- Habitat Chicago staff should lead in **identifying the "civic blitz" stakeholder list** and securing hosts and destinations. The Board and its Resource Leadership Committee, Campaign Steering Committee, and Advisory Council should be leveraged in support of this work once recruited.
- Staff and Board should prioritize getting Jen in front of **civic, corporate, and philanthropic leaders and potential leadership and major donors.**
- The civic blitz should include the following types of **presentations and events:**
 - 1:1 advice-seeking meetings with local corporate and civic leaders
 - Participation on panels and presentations to community organizations and corporate affinity groups
 - Small group cultivation events hosted by volunteers, Board members, and Campaign Steering Committee members
 - Strategic plan leadership briefings
 - Affinity groups to learn and talk through housing insecurity topics
 - Other bespoke thought leadership activities

Design and implement a “civic blitz” strategy to get Executive Director, Jennifer Parks, in front of a range of stakeholders. (Continued.)

- The run of show for these events may include:
 - **Testimonial support** from hosts or other leaders present.
 - A high-level **presentation of the project vision and plans** by Jen, using prepared presentation materials.
 - Significant **time for structured discussion and Q&A** to directly engage the many questions attendees may have.
- Habitat Chicago should **assign a relationship manager** (Jen, Development team members, and Board and Committee leaders who will be in attendance) to each guest to ensure that everyone who attends is followed up with and presented with opportunities to learn more and become more engaged after the event.
- Following each presentation, Habitat Chicago should:
 - **Thank** all participants within 24 hours.
 - **Debrief** to capture information learned, plan follow-up for all attendees, and determine appropriate next cultivation steps for Top Prospects and other participants.



STAFFING & SYSTEMS

Staffing and systems must be in place to support volunteer leaders, manage donor relationships, and track and report on a higher level of development activity.

- Betsy Rubinstein’s time is split between fundraising and team management. Many donors and prospects engaged in the study were not yet familiar with Betsy but looked forward to the opportunity to get to know her.
- The Development team in place at Habitat Chicago is enthusiastic and dedicated to the mission.
- As Habitat Chicago continues to build out a more robust major gifts program, the organization has the tools to implement **best practices for relationship management**. With the updates laid out in the database review*, Habitat Chicago will be ready to plan, track, and report on increased fundraising activity.

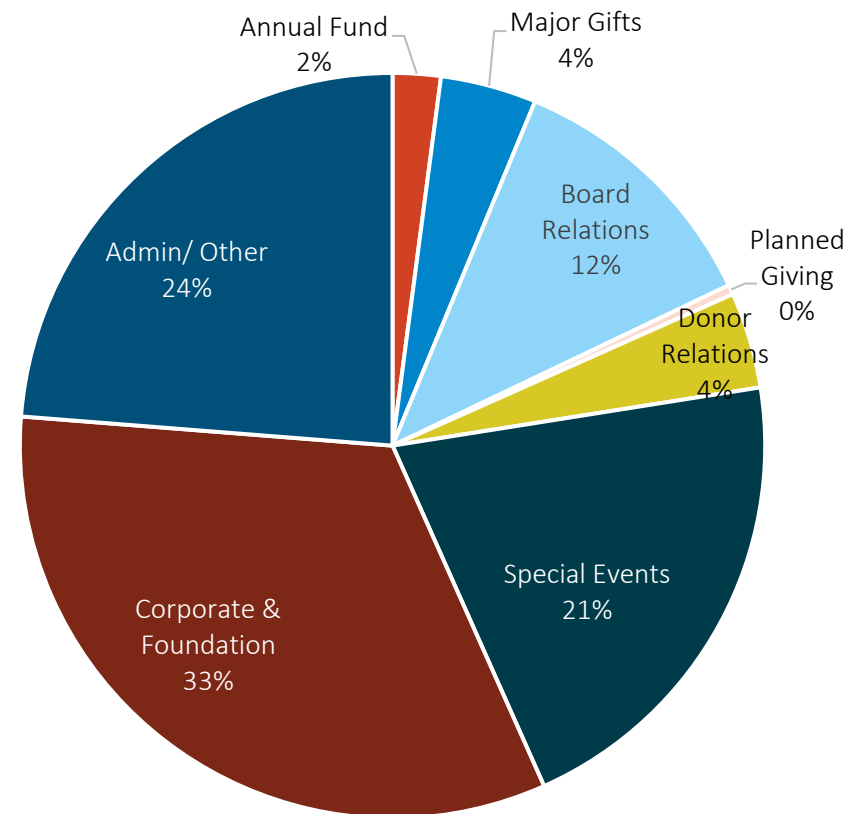
“People think highly of Betsy and she keeps them engaged...she should be more visible.”

“The staff is fantastic, and clearly very passionate.”

*See [Appendix C](#) for conclusions from the database review.

- With an average tenure of 3.4 years, the relatively new development team consists of 10 full time positions, 2 of which, were open during the course of the study.
- The team's self-reported time allocations reveal that the most time (33%) is spent on Corporate & Foundation responsibilities and the least time is spent on Planned Giving.
- Major giving responsibilities account for only 4% of the team's time allocations.

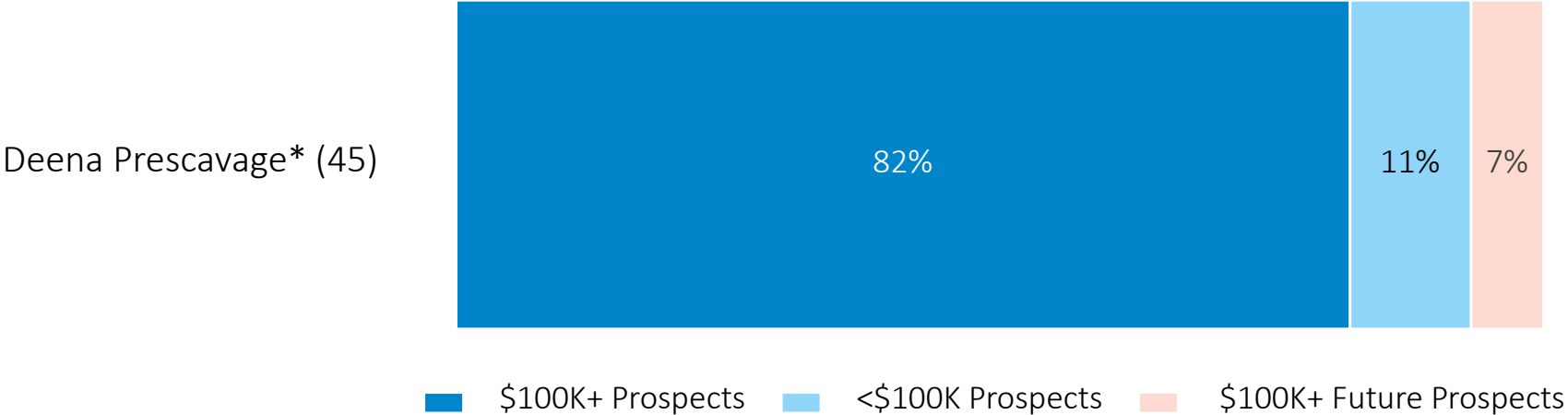
DEVELOPMENT TEAM TIME ALLOCATIONS



STAFFING & SYSTEMS: FINDINGS



- Recognizing that Habitat Chicago is building their major gifts program, only 4.8% of top prospects are currently managed. This leaves 727 Top Prospects (95.2%) who could be assigned to be managed by development staff.
- Major gift portfolios are outlined for four development team members, but during our study, only one development team member had prospects populated in their portfolio in the database.



*note that Deena manages these prospects from an administrative perspective; others are involved in cultivation and solicitation.

- In FY2022, Top Prospects who are currently managed gave \$8,105 to Habitat Chicago on average, while Top Prospects who are currently unmanaged gave \$398 to Habitat Chicago on average.
- Moving unmanaged Top Prospects into portfolios has strong potential to increase annual giving.

# Unmanaged Prospects Moved into Portfolios	Potential Annual Giving Increase
50	\$385,350
100	\$770,700
469 (number of unmanaged Top Prospects who donated in 2022)	\$3,614,583
727	\$5,602,989

Realign current staff positions to maximize frontline fundraising capacity.

- Elevate Development Director Betsy Rubinstein's role to Development Director *and* Campaign Director.
 - Campaign responsibilities include:
 - Spending 70% of time on major gifts and campaign efforts
 - Managing a portfolio of 75-100 leadership gift and major gift prospects
 - Developing campaign strategy and coordinating the development team's campaign efforts
 - Supporting Jen in her campaign-related duties
 - Facilitating Campaign Steering Committee meetings and coordinating volunteer assignments
 - Monitoring campaign progress and reporting to the Campaign Steering Committee and Board
 - Serving as a spokesperson and ambassador for the campaign in a variety of contexts

Realign current staff positions to maximize front-line fundraising capacity. (Continued.)

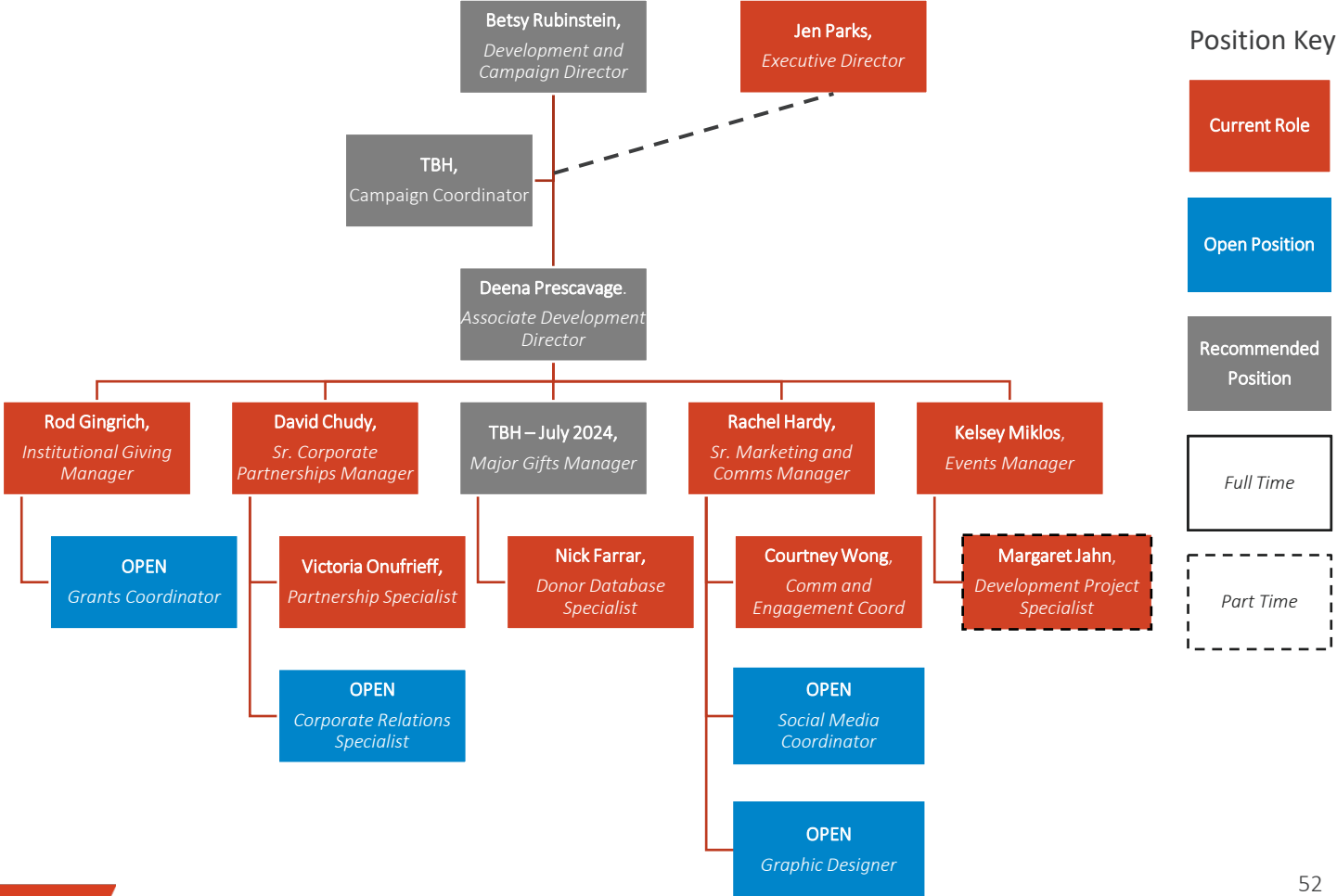
- **Elevate Senior Manager Annual & Major Gifts Deena Prescavage to Associate Development Director.**
 - In this role, Deena will assume responsibility of Betsy's four development staff direct reports and will be responsible for establishing and overseeing operational processes and leading practices. Within the campaign, she will lead prospect management and reporting, as well as gift acceptance, pledge fulfillment, and donor stewardship.
- **Shift Senior Manager Corporate Partnerships Dave Chudy's focus from managing team builds to qualifying corporate prospects and developing relationships with major corporate partners.**
 - Leverage Dave's familiarity with local corporate engagement and giving programs, dedicating more of his time to developing cultivation and solicitation strategies for corporate partners and staffing other Habitat Chicago staff and volunteers on their corporate asks.
 - Maximize the added capacity of the new Corporate Relations Specialist to support Dave's efforts by transferring team build responsibilities to the new hire.
- **Harness Programs Manager Mindy Rueden's success in developing community partnerships by inviting her to collaborate with development staff to support funder conversations, specifically with foundations and corporate prospects focused on equity initiatives.**

STAFFING & SYSTEMS: RECOMMENDATION



Hire a Campaign Coordinator to free up existing development staff to engage in more donor-facing interactions and a Major Gifts Manager for additional frontline support.

Not only will Habitat Chicago require a realignment of staff responsibilities, but it will also require additional staff to support elevated campaign activity. As a result, we recommend hiring a Campaign Coordinator (TBH immediately) and a Major Gifts Manager (TBH July 2024).



Position Key:

- Current Role
- Open Position
- Recommended Position
- Full Time
- Part Time

Hire a Campaign Coordinator to free up existing development staff to engage in more donor-facing interactions and a Major Gifts Manager for additional frontline support. (Continued.)

The Campaign Coordinator assumes the primary responsibility for supporting the Habitat Chicago's development staff and volunteer leadership team in carrying out a campaign.

High-level responsibilities include:

- Supporting the Executive Director, Campaign Director, and the broader team's major gifts outreach, including developing proposals, supporting strategy development, and coordinating outreach, to maximize donor-facing meetings and activities with prospects
- Working closely with the Campaign Director and campaign counsel to define campaign priorities, support campaign activities, and track progress towards the campaign timeline
- Managing volunteer campaign activities including meeting scheduling, support materials, meeting minutes, and follow-up
- Assisting volunteers, Board, staff, and committee with prospect outreach, including meeting scheduling and basic prospect research
- Coordinating donor recognition activities, campaign records management, and gift processing

The Major Gifts Manager partners with Habitat Chicago's staff and volunteers to build and sustain a robust major gifts program furthering the organization's mission and vision.

We recommend hiring the Major Gifts Manager in July 2024 as the focus of the campaign shifts to prospects at the <\$100K levels.

High-level responsibilities include:

- Managing a portfolio of 125-150 Major Gift Prospects (\$25K+)/High-end Annual Gift Prospects (\$10K+)
- Conducting one-to-one cultivation, solicitation, and stewardship meetings with donors and prospects
- Researching prospects and preparing solicitation planning sheets and proposals for meetings with individual major gift donors and campaign prospects
- Maintaining prospect lists and prospect tracking reports utilizing the donor database
- Coordinating donor activities with the Executive Director, the Development & Campaign Director, development staff, and volunteers

Develop donor portfolios to increase the number of prospects in active management.

A \$10-15M campaign would require 99 prospects qualified at \$100k and above:

- Qualifying 99 \$100K+ Leadership Gift Prospects will likely take 706 total visits
- If completed over 4 years, that is 14.7 visits per month on average, which requires a least 1.2 FTE focused on major gifts above \$100K.

We recommend developing the outlined major gift portfolios for the following roles:

Position	Prospect Type	Number of Prospects	Monthly Visit Goal
Executive Director	Leadership Gift Prospects (\$100k+) and Board	25-50	2-5
Development and Campaign Director	Leadership Gift (\$100k+) , Major Gift (\$25k+), and Planned Gift Prospects	75-100	8-10
Major Gifts Manager <i>(TBH July 2024)</i>	Major Gift Prospects (\$25k+)/High-end Annual Gift Prospects (\$10k+)	125-150	12-15
TOTAL		225 -300	10-15 (before July 2024) 22-30 (after July 2024)

Conduct biweekly prospect strategy meetings to drive solicitation plans.

- **Meet as a team on a regular basis to collaborate on prospect strategy**, prepare for upcoming visits, and problem solve as needed.
 - We recommend establishing a cadence of **biweekly, 60- to 90-minute meetings**. As the campaign progresses and outreach becomes more routine, meetings may become less frequent.
 - Regular participants should include Betsy, Dave, **any other team members managing campaign prospects, the campaign coordinator, and Deena**—who will help prepare the data and research needed to support prospect strategy conversations, ensure necessary updates are captured in the database, and serve as a thought partner to frontline fundraisers.
 - Jen should only be asked to join meetings in advance of **solicitations of prospects in her portfolio that require coordination among multiple team members** (more routine prep will take place during the 30-minute weekly meetings described earlier in the report). Other staff partners (such as Mindy) could also be invited to attend on an as-needed basis.
 - Each meeting should include time for general campaign updates and roundtable discussion in which fundraisers share their progress **qualifying and cultivating the top prospects** in their portfolio, invite input from the group on outreach strategies, and workshop ask amounts, solicitation teams, case messages, et cetera.

Consider engaging counsel to chart a path that leads to campaign success.

- A successful campaign will be a significant effort for Habitat Chicago.
 - Counsel can support staff and leaders with campaign and fundraising expertise in the sector and the region, benchmarks, and a roadmap for success while inspiring confidence among donors.
- Habitat Chicago may consider retaining counsel for the following:
 - Rebalancing portfolios for more targeted relationship management
 - Leading a campaign branding and identity process and developing a campaign case deck
 - Setting up a prospect strategy meeting cadence and topics and facilitating those discussions
 - Collaborating with staff to develop detailed solicitation strategies for top prospects
 - Guiding the civic blitz strategy, including through the generation of talking points, agendas, materials, et cetera
 - Providing training to team members as they settle into new roles and ramp up frontline fundraising activity
 - Conducting training and providing resources to help the Board, CSC, and other volunteers step up as leaders for the effort

GRATITUDE

The Campbell & Company team extends our sincere gratitude to Habitat for Humanity Chicago for your engagement, hard work, and thoughtful attention throughout the study process.

It has been our pleasure to work with your outstanding staff and enthusiastic community of volunteers and supporters, and we look forward to working with the organization in the future.

Julia McGuire Melissa Berliner Kelsey Nelson Hailey Nishita
Rowan Barnes Rosie Chevalier Michael Furlong
Steph Venkoske



APPENDICES

APPENDIX A: STUDY PARTICIPATION



CASE INTERVIEW & WORKSHOP PARTICIPANTS

Dave Chudy	Mike Pfeffer
Felicia Dawson	Deena Prescavage
Rachel Hardy	Neville Reid
Jerome Harper	Kristi Rowsell
Jeff Jozwiak	Betsy Rubinstein
Dan Law	Mindy Rueden
Dan Marszalek	Cortland Smith
Jen Parks	Viktoria Stefanova
Tammy Pearce	

INTERNAL INTERVIEW PARTICIPANTS

Cam Avery	Mike Pfeffer
Amy Bilton	Deena Prescavage
Dave Chudy	Betsy Rubinstein
Rod Gingrich	Mindy Rueden
Rachel Hardy	Cortland Smith
Misia Krasowski	Don Wedd
Jen Parks	

CAMPAIGN PLANNING COMMITTEE MEMBERS

Cam Avery	Phil Kinnison
Amy Bilton	Dan Law
Dave Chudy	Jen Parks
Andy Dahle	Mike Pfeffer
Mirlene Dossous	Deena Prescavage
Rachel Hardy	Neville Reid
Jerome Harper	Betsy Rubinstein
Christopher Johnson	Shahiedah Shabazz
Jeff Jozwiak	Matthew Spiegel

APPENDIX A: STUDY PARTICIPATION



EXTERNAL INTERVIEW PARTICIPANTS

Doug Anderson	Jeff Jozwiak
David Augustyn	Kathy Lanyi
Rev. Andrea Billhardt	Alan Lev
Lucy Baird	Jessica Lingertat
JeNyce Boolton	Chris Martinez
Lynn Buhl	Dan Marszalek
Norman Clearfield	Sean McGuire
Angela D'Aversa	Chris Noon
John Doyle	Tammy Pearce
Dean Egerter	Christy Prah
Steven Galanis	Shandra Richardson
Bob Gallo	Kristi Rowsell
Lakshmi Halasyamani, MD	Matt Spiegel
Walter Hansen	John Taylor
Sean Heath	Wesley Walker
Monique B. Jones	

LEADERSHIP BRIEFING PARTICIPANTS

Sam Binion
Jenna Coyne
David Doig
Mirlene Dossous
Brian Doyle
Vanessa Hall
Evan Hochberg
Kevin Jackson
Tracey Kosky
Abraham Lacy
Kathy Lanyi
Tricia Manhard
Joe Morrow
Christy Prah
Lauren Rooney
Linda Sancen
Trina Shepherd
Janece Simmons
Trina Tyler

APPENDIX B: CAMPAIGN STEERING COMMITTEE ROLE DESCRIPTION



The Campaign Steering Committee serves as the campaign's leadership group throughout the campaign. With oversight from Habitat Chicago's Board and in partnership from Habitat Chicago leadership, the Committee assists in developing the framework for the campaign, guiding campaign progress, cultivating and soliciting key donors, and building enthusiasm for the campaign among all Habitat Chicago's constituents.

The CSC led by campaign co-chairs is comprised of 4-6 members and it will meet on a quarterly basis. The Committee's work will be organized in a manner that ensures efficient and appropriate use of its members' time and skills.

COMMITTEE RESPONSIBILITIES:

Fundraising and Donor Relations

- Facilitating connections between leadership and donors.
- Cultivate and solicit leadership and major gift donors.
- Help develop and prioritize the list of potential campaign donors.
- Provide input on individual potential donor cultivation and solicitation strategies.
- Open doors to potential donors.
- Personally thank and steward donors.

Campaign Communications and Advocacy

- Advocate for Habitat Chicago and its campaign among the local community.
- Provide input on campaign communications strategies and materials.
- Host small gatherings and events.

Campaign Management

- Attend regular committee meetings and participate in individual meetings with staff or committee leaders.
- Assist in identification and recruitment of key campaign volunteers as needed.
- Tracking and driving Habitat Chicago's progress toward achieving key benchmarks.

APPENDIX C: DATABASE REVIEW



TABLE OF CONTENTS

- 1 Context
- 2 Methodology
- 3 Findings and Recommendations
- 4 Conclusion



CONTEXT

- Habitat for Humanity Chicago (HFH) engaged Campbell & Company in March 2023 for a Campaign Planning Study.
- HFH's success in a large-scale fundraising endeavor will, in part, depend upon consistent and effective use of the Causeview, Salesforce database to track and facilitate donor engagement.
- To address this critical component of current fundraising best practices, Campbell & Company conducted a database review, consisting of a broad overview of database records and practices with the aim of understanding how well information is being used and tracked for effective relationship management.
- The following report provides an overview of the process, findings, and recommended strategies.
- Campbell & Company team members are available if HFH staff have any questions or comments.

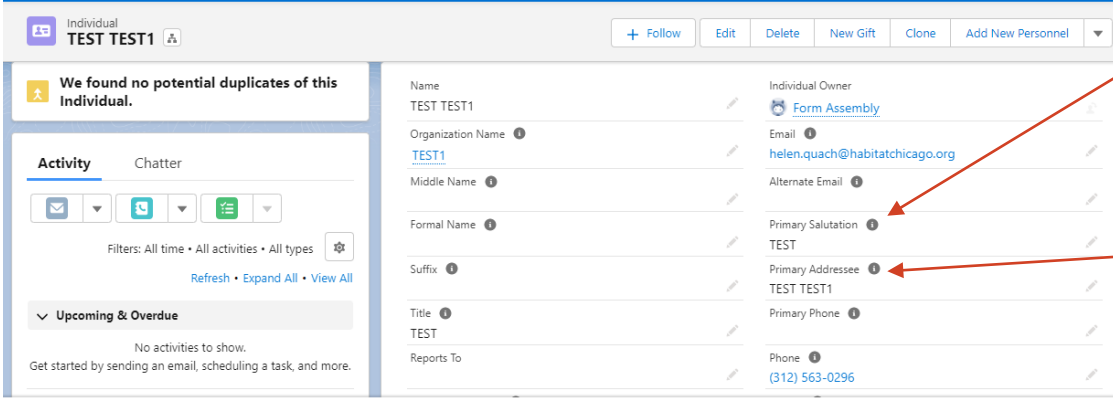


METHODOLOGY

- Michael Furlong, Strategic Information Services Senior Consultant, and Steph Venskoske, Strategic Information Services Consultant conducted the review of HFH's Salesforce database and its usage, with a focus on the tools within Salesforce that directly support relationship management, including:
 - Individual Record, Activity, Opportunities (with a focus on those with a Type of Major Gift)
- This review included a series of meetings with Deena Prescavage, Senior Manager, Annual & Major Gifts and Don Wedd, IT & Systems Manager to discuss usage as well as additional time spent remotely in the database.
- Key questions addressed throughout included:
 - Does the database have adequate capability to support necessary relationship management functions?
 - Are HFH staff using Salesforce to effectively track and support relationship management?
 - Do frontline fundraisers have access to relationship management reports?
 - Does HFH need to make any changes or upgrades to the system?

FINDINGS & RECOMMENDATIONS

INDIVIDUAL RECORD



Individual
TEST TEST1

+ Follow Edit Delete New Gift Clone Add New Personnel

We found no potential duplicates of this Individual.

Activity Chatter

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

Salesforce Request Recent Items User Guides

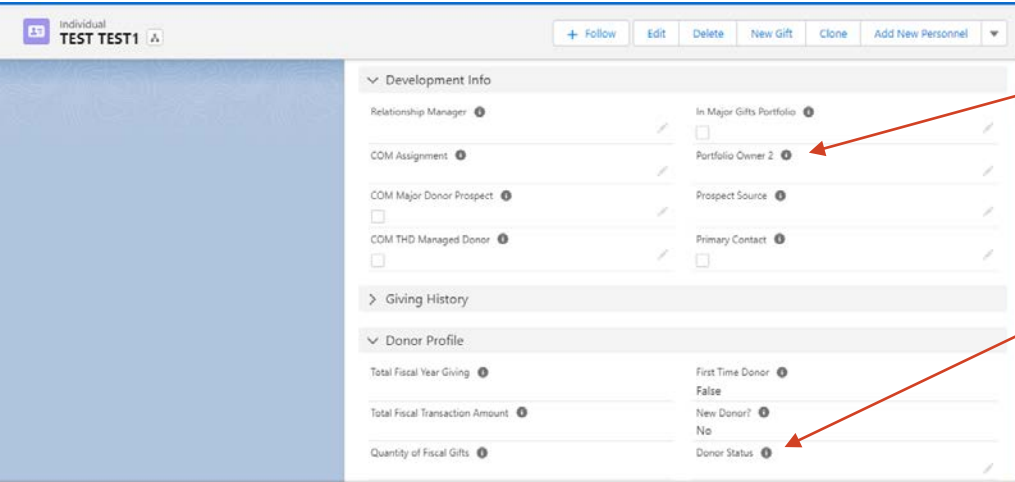
Name	TEST TEST1	Individual Owner	Form Assembly
Organization Name	TEST1	Email	helen.quach@habitatchicago.org
Middle Name		Alternate Email	
Formal Name		Primary Salutation	TEST
Suffix		Primary Addressee	TEST TEST1
Title	TEST	Primary Phone	
Reports To		Phone	(312) 563-0296

1: Primary Salutation

2: Primary Addressee

3: Portfolio Owner 2

4: Donor Status



Individual
TEST TEST1

+ Follow Edit Delete New Gift Clone Add New Personnel

Development Info

Relationship Manager		In Major Gifts Portfolio	<input type="checkbox"/>
COM Assignment		Portfolio Owner 2	
COM Major Donor Prospect	<input type="checkbox"/>	Prospect Source	
COM THD Managed Donor	<input type="checkbox"/>	Primary Contact	<input type="checkbox"/>

Giving History

Donor Profile

Total Fiscal Year Giving		First Time Donor	False
Total Fiscal Transaction Amount		New Donor?	No
Quantity of Fiscal Gifts		Donor Status	

Salesforce Request Recent Items User Guides

INDIVIDUAL RECORD

FINDINGS

1. The *Primary Salutation* field is in use on all Household and Individual records since January 1, 2020.
2. The *Primary Salutation* field is in use on almost all records. There are 45 Organizations records that do not have a *Primary Salutation* which is okay for Organizations.
3. *Portfolio Owner 2* is tracked at the Individual level and is auto populated on Activity and Opportunity records upon creation.
4. The *Donor Status* field is only populated on 4 Individual records. The values in this field are appropriate but a value for 'Disqualified' is missing.

RECOMMENDATIONS

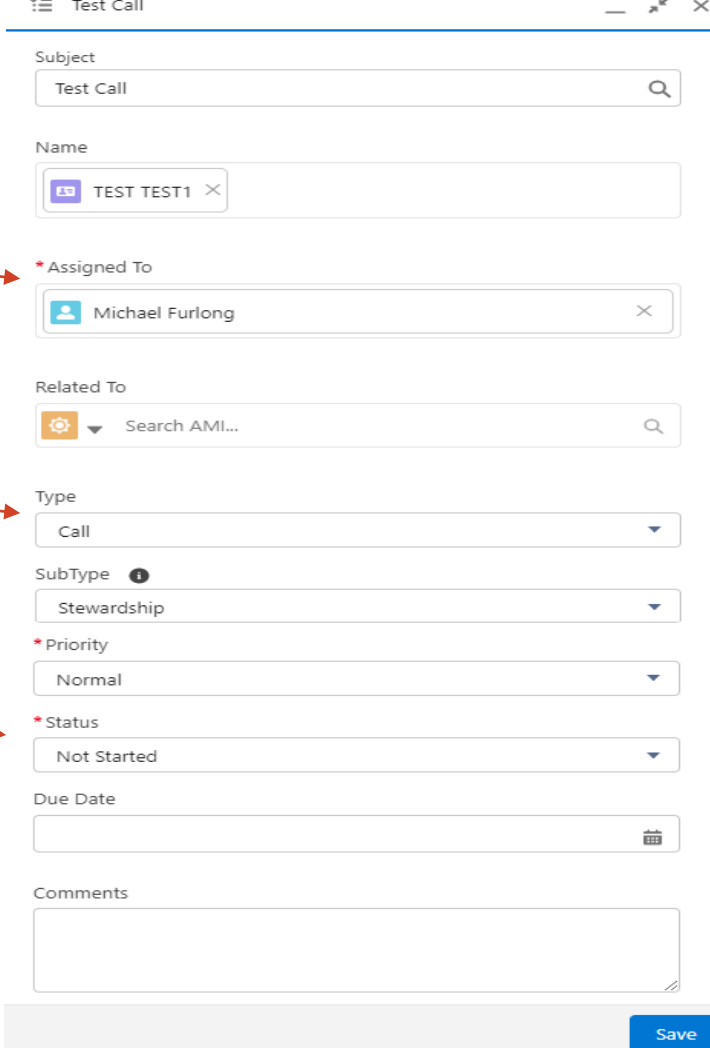
1. None at this time.
2. None at this time.
3. We recommend that this field be renamed to Portfolio Owner since it is the only portfolio owner field displayed.
4. This field should be populated on all Major Donors and Prospects. We recommend adding a new value of 'Disqualified' to the list.

FINDINGS & RECOMMENDATIONS ACTIVITY

1: Assigned To

2: Type

3: Status



The screenshot shows a web form titled "Test Call" with the following fields and annotations:

- Subject:** A text input field containing "Test Call".
- Name:** A text input field containing "TEST TEST1".
- * Assigned To:** A dropdown menu showing "Michael Furlong". An arrow from the text "1: Assigned To" points to this field.
- Related To:** A dropdown menu with a search icon and the text "Search AML...".
- Type:** A dropdown menu showing "Call". An arrow from the text "2: Type" points to this field.
- SubType:** A dropdown menu showing "Stewardship".
- * Priority:** A dropdown menu showing "Normal".
- * Status:** A dropdown menu showing "Not Started". An arrow from the text "3: Status" points to this field.
- Due Date:** A date input field with a calendar icon.
- Comments:** A large text area for notes.
- Save:** A blue button at the bottom right.

FINDINGS

1. All Activities have a staff member Assigned in the *Assigned To* field. This field is required and being used as expected.
2. The *Type* field is not required on the Activity record at this time and is only in use on ten records created since January 1, 2021. There are 23 *Types* available in the drop down and not all are in use.
3. There are 61 Activities with a *Status* of 'Not Started' and a Due Date in the past. This field is required.

RECOMMENDATIONS

1. None at this time.
2. The *Type* field should be required on all Activities for reporting purposes. The list of available *Types* should be reviewed and narrowed to only include those that are needed. Ideally twelve or less *Types* is recommended.
3. Past Activities should be reviewed and the *Status* or Due Date should be updated. We recommend creating an audit report to be run monthly to check for past due Activities.

FINDINGS & RECOMMENDATIONS OPPORTUNITIES

1: Proposal/
Solicitation Date

3: Close Date

5: Primary
Campaign Source

6: Request Amount

7: Staff
Solicitor 1

2: Amount

4: Stage

8: Lead Solicitor

9: Anticipated
Amount & Date
(fields do not
exist)

New Opportunity: Major Gift

Opportunity Information

Opportunity Owner Michael Furlong	Opportunity Record Type Major Gift
*Opportunity Name	Proposal/Solicitation Date
Individual TEST TEST1	Amount
Organization Name Search Organizations...	*Close Date
Type --None--	*Stage --None--
Primary Campaign Source Search Campaigns/Appeals...	Probability (%)
Tier --None--	Closed Lost Reason --None--
Identified By --None--	Lost Reason Notes
Next Step	Invoice #
Project Overview Search Project Overviews...	Annual Report FYE
Origin --None--	
Flag	
Next Milestone Date	
Reporting Deadline	

Targets

Request Amount	Funding Proposal
Pledge Fulfilled	

Solicitors

Lead Solicitor Search Individuals...	Volunteer Solicitor 1 Search Individuals...
Staff Solicitor 1 Search Individuals...	Volunteer Solicitor 2 Search Individuals...
Staff Solicitor 2 Search Individuals...	

Cancel Save & New Save

OPPORTUNITIES

FINDINGS

1. There are 120 Major Gift opportunities that do not have a *Proposal/Solicitation Date*.
2. *Amount* is required on the Opportunity record.
3. The *Close Date* field is required and in use on all Opportunities. There are 15 Opportunities in statuses of Cultivation or Solicitation with a *Close Date* in the past.
4. The Opportunity *Stage* is a combination of Donor Status and Opportunity Stage, it is in use on all Opportunities.

RECOMMENDATIONS

1. This field should be populated on all Opportunities that have been presented to a prospect.
2. None at this time.
3. We recommend creating an audit report to track Opportunities where the Close Date has passed but the Opportunity may still be Outstanding.
4. We recommend removing the *Stages* of Identification, Qualification and Cultivation and replacing them with a single *Stage* of 'Strategy Development' to represent a single pre-solicitation *Stage*. Donor Status should be tracked using the Donor Status field on the Individual record.

OPPORTUNITIES: CONTINUED



FINDINGS

5. There are ten records created since January 1, 2021 that do not have a *Primary Campaign Source* selected. Values that are in use are appropriate.
6. There are 38 records that do not have a *Requested Amount*.
7. There are 105 Major Gift Opportunities that do not have a *Staff Solicitor 1* assigned. Staff indicated that this field is to be used instead of Primary Relationship Manager, and that unassigned prospects are intentional.

RECOMMENDATIONS

5. If a *Primary Campaign Source* is known, it should be assigned. It should not be required as it may not be known until the gift agreement is signed.
6. This field should be populated on all Opportunities that have been presented to a prospect. We suggest creating an audit report to track Opportunities in or past the Solicitation stage that do not have a *Requested Amount*.
7. Consider renaming this field to represent additional solicitors on the Opportunity and updating the Lead Solicitor to represent the primary staff person associated with the Opportunity.

OPPORTUNITIES: CONTINUED

FINDINGS

8. There are two Major Gift Opportunities that do not have a *Lead Solicitor* assigned.
9. The fields *Anticipated Amount* and *Anticipated Date* do not currently exist on the Opportunity record.

RECOMMENDATIONS

8. We recommend this field be required so that a *Lead Solicitor* is assigned to all Major Gift opportunities. Also, in addition to the previous recommendation, consider renaming this field.
9. A new Currency field should be created for *Anticipated Amount* and a new Date field should be created for *Anticipated Date*. These fields should be populated on all Opportunities that are approaching the solicitation stage.

Habitat for Humanity Chicago is beginning to build out a more robust Major Gift tracking system. An important part of tracking is the creation of reliable reports that quickly and easily display the data that is input into the system. We looked specifically at the following report areas:

- Activity tracking
 - At this time there is not a report to track major gift activities. This report should break down open and closed tasks by relationship manager and task type.
- Portfolio/Pipeline
 - A Portfolio Owner report exists but does not currently include a prospect status. Ideally this report would show a list of Accounts that each relationship manager is responsible for. It would also be able to be sorted/filtered by Prospect Status.
- Opportunity
 - A good dashboard is set up for corporations and foundations but not for major gifts at this time. Ideally, this report will also be broken down by relationship manager as well as be sorted/filtered by Opportunity Stage.
- Audit
 - An audit report for certain Actions and Opportunities are recommended in the report. These are key for making sure data is being entered correctly.



REPORTS



CONCLUSION

- HFH's Salesforce database has the tools required for relationship management. There is the ability, with a few minor changes, to prepare the system for better tracking. Implementing the recommendations on the previous slide will help position HFH and the system for future success.
- Staff have begun initial conversations to work on system updates and changes to further help with fundraising initiatives.
- Once system updates are complete and initial data entry has begun, reports should be developed/updated for tracking purposes as outlined on the previous slide.
- We look forward to discussing the results of our work with you in greater detail and would be pleased to provide further assistance in maximizing HFH's Salesforce utilization to help ensure the continued growth of the major gifts program.

APPENDIX D: CAPACITY ANALYSIS REPORT



METHODOLOGY AND DEFINITIONS



CONTEXT

- Habitat for Humanity Chicago (HFH) engaged Campbell & Company in March 2023 for a Campaign Planning Study.
- This analysis investigates the capacity and giving history of HFH's prospect pool to help HFH identify top campaign prospects, rebalance portfolios, and build data-driven campaign strategy.
- The following report provides an overview of the process, findings, and recommended strategies.
- Campbell & Company team members are available if HFH staff have any questions or comments.

METHODOLOGY



Wealth Screening with Windfall

In 2023, Habitat Chicago screened 13,730 records through Windfall, which looks for publicly available assets and philanthropic gifts.



Data Collection

On 4/10/23 Habitat Chicago sent C&C data for 108,561 individuals and organizations, including biographical information, giving history, and proposals. Habitat Chicago also sent C&C wealth screening results from 2023 and earlier.



Household De-duplication

C&C cleaned data and de-duplicated households and organizations so that constituents with identified spouses or the same address and last/organization name were grouped into one household, resulting in 103,307 householded constituents.



Quantification of Capacity

C&C quantified capacity for each householded constituent in the form of the Best Wealth Indicator (BWI) as detailed in upcoming slides.



Segmentation

C&C segmented householded constituents into Prospects and Future Prospects as detailed in upcoming slides.



Habitat Chicago Vetting

C&C sent preliminary prospect list containing segmentation and capacity of all constituents to Habitat Chicago. Habitat Chicago reviewed list and updated prospect status for 52 household records. Householding was also updated for 55 households.

Quantification of Capacity

The capacity of a constituent is quantified in the form of the Best Wealth Indicator (BWI).

The BWI is the estimated amount that a constituent is able to give to **all** philanthropic interests over **five** years. For this analysis, the BWI was calculated as the maximum/largest of the following:

- Largest gift amount to HFH (hard and soft credit)
- Five years of fundraising progress to HFH (04/10/2018 – 04/10/2023, hard and soft credit, outright gifts and pledges)
- Five years of cash giving to HFH (04/10/2018 – 04/10/2023, hard and soft credit, outright gifts and pledge payments)
- Largest ask amount from HFH proposals
- 5% of Net Worth from Windfall

Notes

- Capacity is capped at \$30M in order to keep the ultra-wealthy from skewing results.
- Capacity for Donor Advised Funds is set to zero.
- Capacity for Organizations is based on prior giving and multiplied by 3, since organizations cannot be wealth screened.

Segmentation

A **Prospect** is a household or organization that looks like a near term major gift donor to Habitat for Humanity Chicago.

A Prospect is categorized as such if the household or organization meets the following conditions:



AFFINITY

Largest gift \geq \$1,000
OR
Top 10% of RFM
Score*



RECENCY

Giving in the
last 3 years
(4/10/2020 –
4/10/2023)

A **Future Prospect** is a household or organization that does not look like a near term major gift donor to HFH because they look less engaged and/or less philanthropic.

A Future Prospect is categorized as such if the household or organization does not satisfy the Prospect conditions.

Note: Any constituents that are deceased, inactive, have a com assignment of “comfr-hfhi active”, or have asked not to be solicited by HFH were disqualified from the analysis.

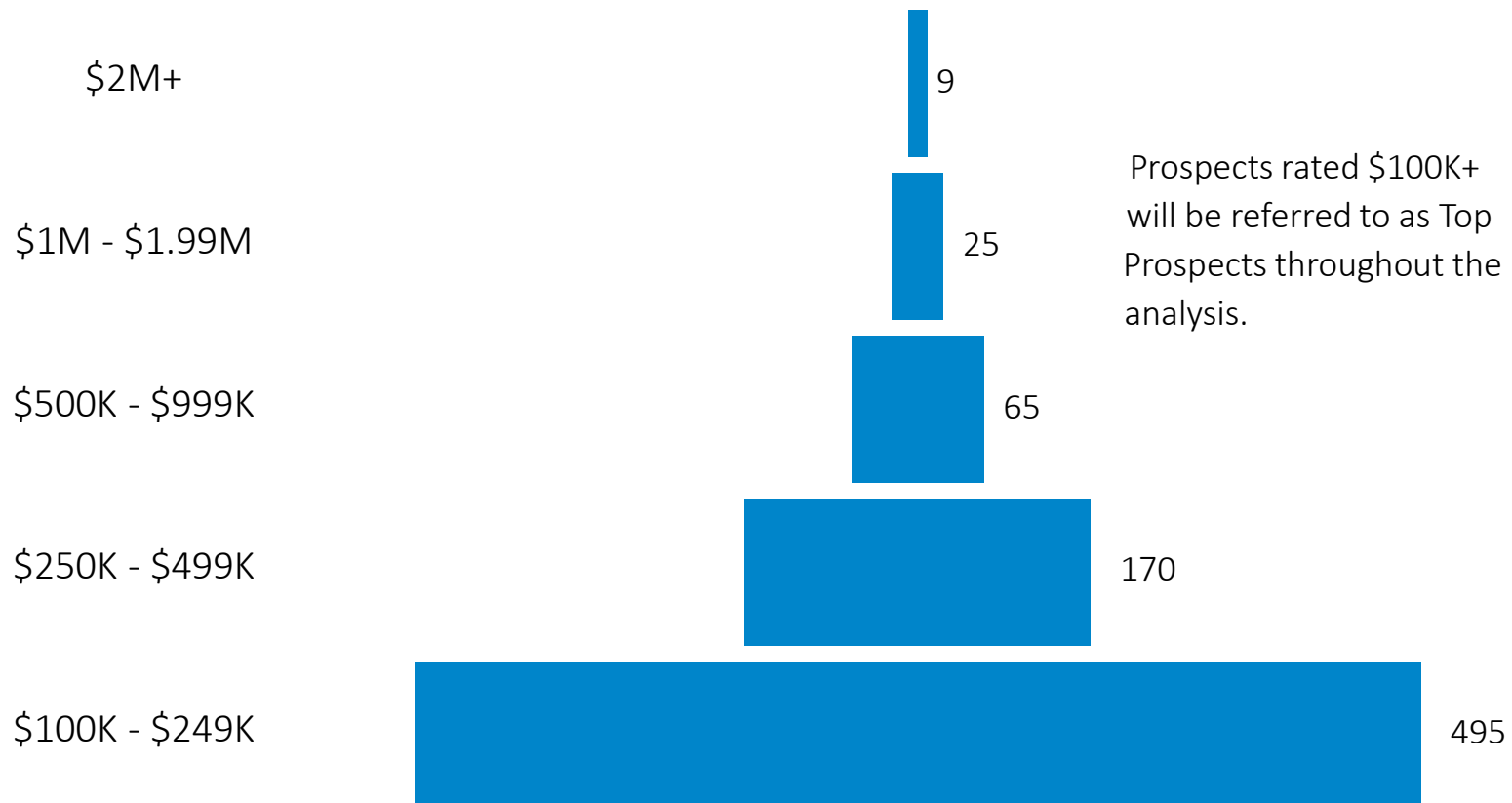
* See [slide 105](#) for details on how the RFM score was created.



CHARACTERISTICS OF TOP PROSPECTS

CAPACITY OF TOP PROSPECTS

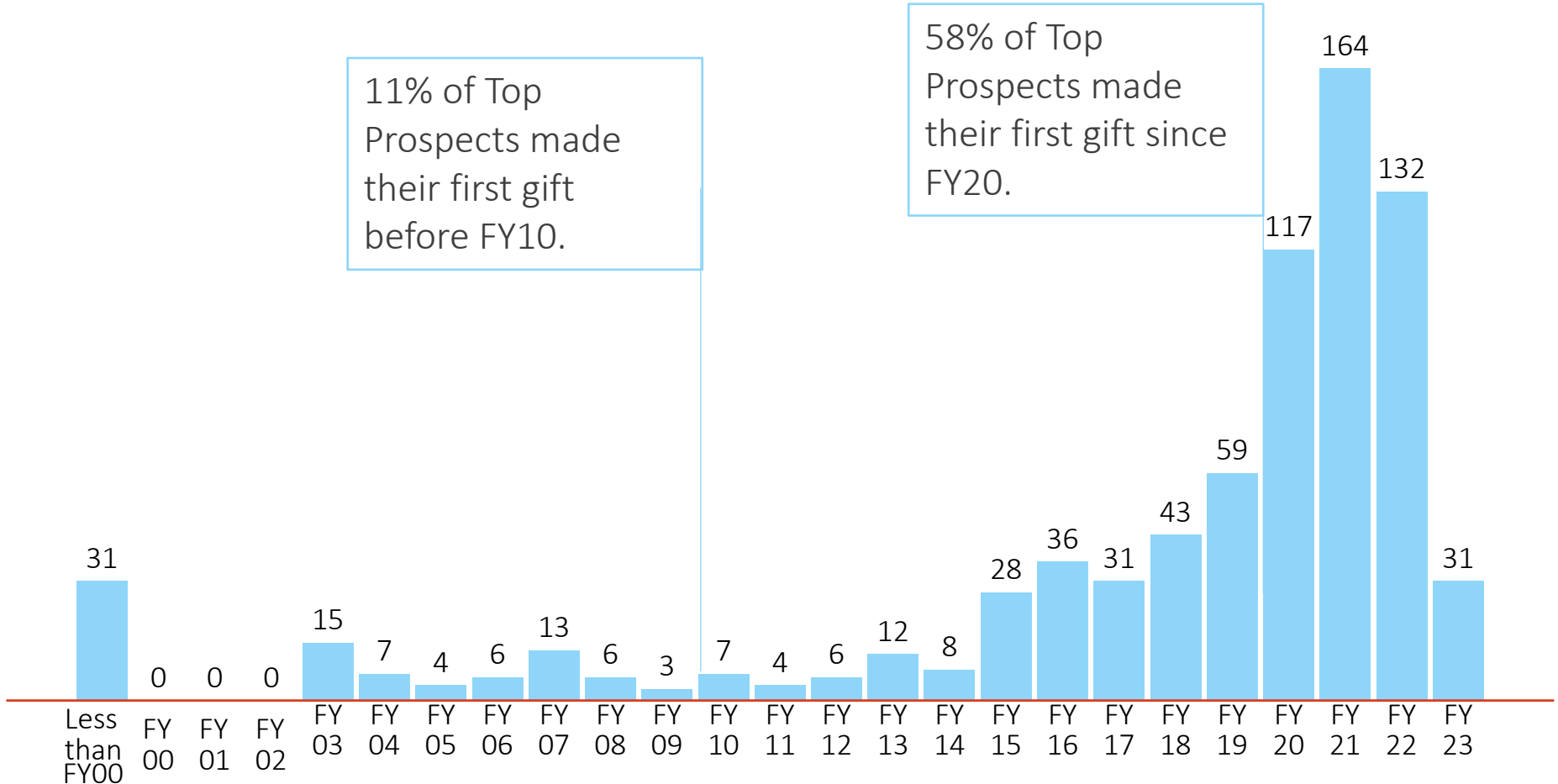
Campbell & Company found \$253M in capacity* from 764 Prospects rated \$100K+, as well as another \$2.1B in capacity from 7,088 Future Prospects rated \$100K+.



* Capacity is defined in terms of the BWI, as detailed on a previous slide. BWI is the estimated amount a household or organization is able to give to all philanthropic interests over five years.

LONGEVITY OF TOP PROSPECTS

TOP PROSPECTS BY FISCAL YEAR OF FIRST GIFT

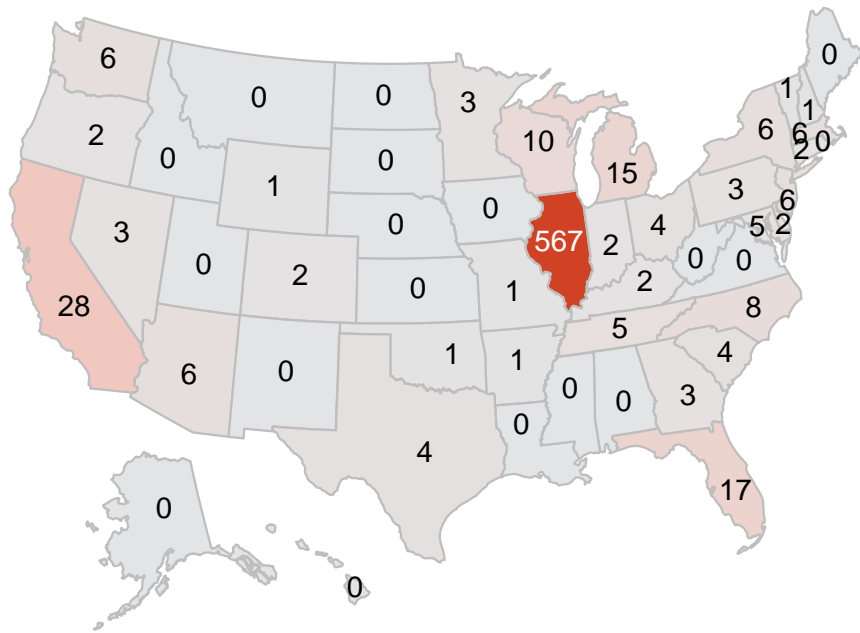


Engagement of Top Prospects who are longtime donors may look different than those who made their first gift more recently.

LOCATION OF TOP PROSPECTS

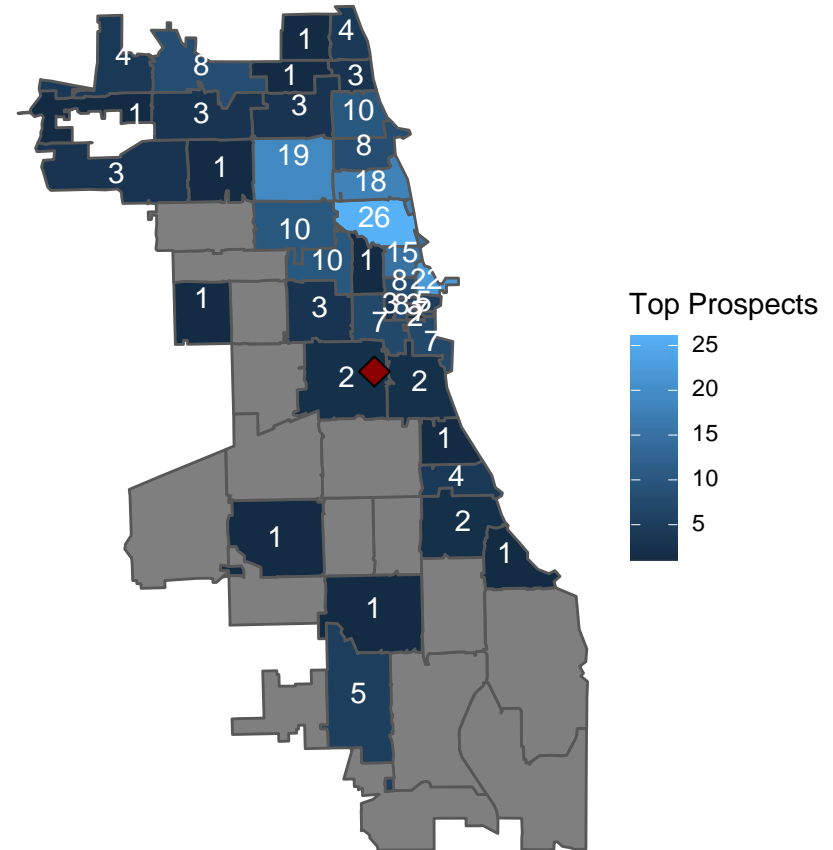
TOP PROSPECTS BY PRIMARY HOME ADDRESS

74.2% of Top Prospects live in Illinois which represents 65.8% of capacity.



Top Prospects can also be found in the states above.

Top Prospects reside in 41 Chicago zip codes.



CONSTITUENCY OF TOP PROSPECTS

TOP PROSPECTS BY CONSTITUENCY CODE



The number of Top Prospects in each constituency can be seen above. Some Top Prospects may belong to more than one constituency.

BOARD

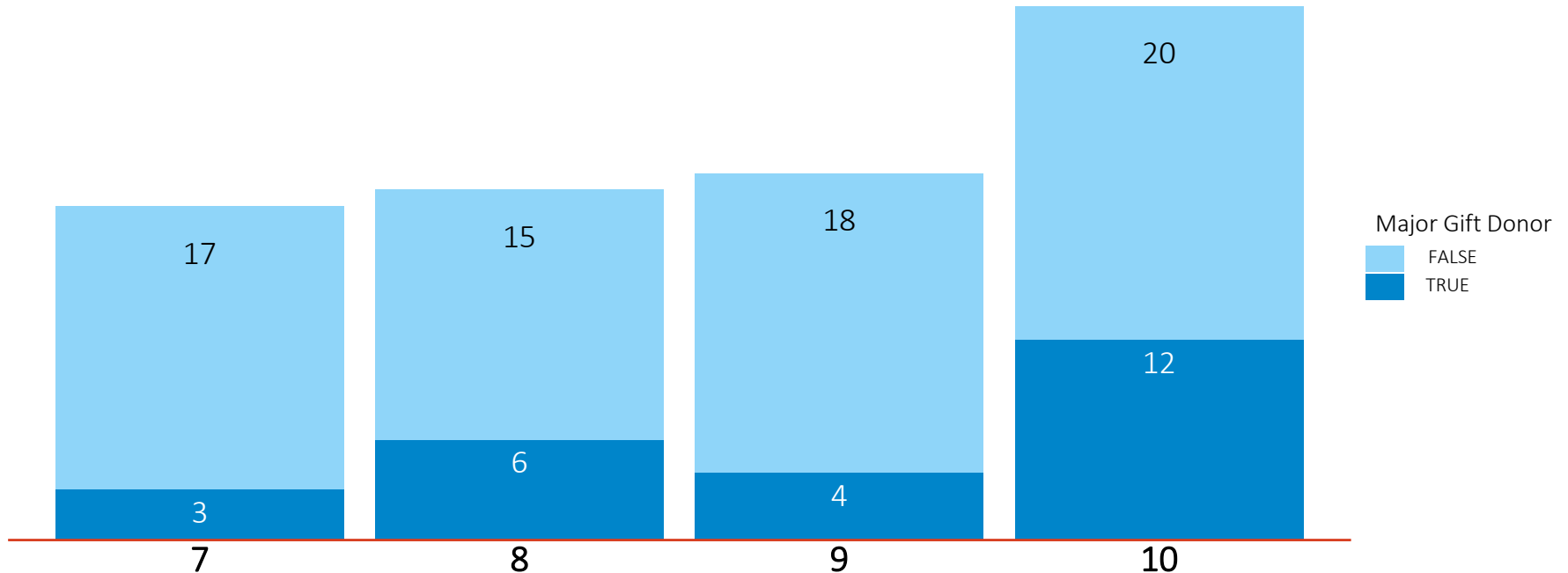
- Most current board members are Prospects (76.5% of current board members), many of whom have \$100K+ capacity (52.9% of current board members). The breakdown can be seen below.

Board	\$100K+ Prospects	<\$100K Prospects	\$100K+ Future Prospects	<\$100K Future Prospects
Current Member	9	4	0	1
Former Board	6	5	0	0
Total	15	9	0	1

PLANNED GIVING

NUMBER OF FISCAL YEARS GIVEN (OUT OF LAST 10)

- Endowment and Planned Giving prospects typically exhibit strong connection to an organization through giving over multiple years.
- 95 Top Prospects with \$31.2M in capacity have given at least 7 out of the last 10 fiscal years
- 19 of these are associated with a trust
- 25 are major gift donors



Number of Fiscal Years Prospect Made a Gift (out of 10)



PORTFOLIO ANALYSIS

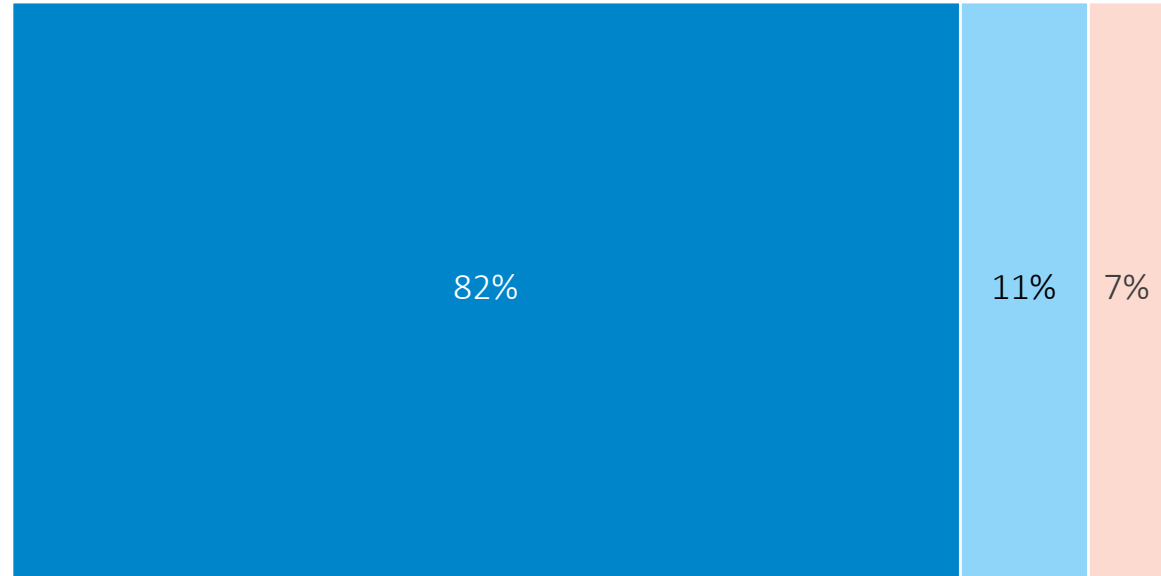
PORTFOLIO COMPOSITION



45 households are currently being managed.

Deena Prescavage* (45)

*note that Deena manages these prospects from an administrative perspective; others are involved in cultivation and solicitation.



■ \$100K+ Prospects ■ <\$100K Prospects ■ \$100K+ Future Prospects

37 Top Prospects (4.8%) are currently managed. This leaves 727 Top Prospects (95.2%) who are not currently managed by major gift officers, according to the database. We recommend HFH review these names and move them into qualification.

IMPACT OF MOVING UNMANAGED TOP PROSPECTS INTO PORTFOLIOS



- In FY2022, Top Prospects who are currently managed gave \$8,105 to HFH on average, while Top Prospects who are currently unmanaged gave \$398 to HFH on average.
- Moving unmanaged Top Prospects into portfolios has strong potential to increase annual giving. The table below shows the potential increase in annual giving to HFH based on the number of unmanaged Top Prospects who are fruitfully moved into portfolios.

# Unmanaged Prospects Moved into Portfolios	Potential Annual Giving Increase
50	\$385,350
100	\$770,700
469 (this is the number of unmanaged Top Prospects who donated in 2022)	\$3,614,583
727	\$5,602,989

YIELD FROM CLOSED PROPOSALS



Of 248 closed major gift proposals, ask amounts were recorded for 231 proposals. These closed major gift proposals have an average overall yield of 41.9%.

Each individual proposal's yield is the amount funded divided by the ask amount.

Measure	Definition	Value	Interpretation
Average Yield	Average of the yield of all proposals.	41.9%	On average, 41.9% of the amount asked is funded. This includes \$0 from declined proposals.
Conversion Rate	Percent of opportunities funded out of all asked	48.9%	49.9% of proposals were funded
Average Yield of Funded Proposals	The average of the yield of all funded proposals.	85.7%	Of those funded, HFH received, on average, 85.7% of the dollars asked

* 1 proposal yield was capped at 380% (3 standard deviations above the mean)

YIELD FROM CLOSED PROPOSALS

The breakdown of average yield, conversion rate, and average yield of funded proposals is shown below:

Level of Gift Solicited	Number of Proposals	Average Yield (\$ funded/\$ asked)	Conversion Rate (% Funded)	Average Yield of Funded Proposals
\$100K+	11	32.3%	45.5% (5)	71.1%
\$25K - \$99.9K	12	28.3%	50.0% (6)	56.7%
\$5K-\$24.9K	93	34.0%	41.9% (39)	81.0%
Less than \$5K	115	50.7%	54.8% (63)	92.6%
All Major Gift	231	41.9%	48.9% (113)	85.7%

The conversion rate of 48.9% is lower than leading practice. The average yield of funded proposals (85.7%) is relatively high, suggesting that HFH has an opportunity to consider higher level asks.

* 1 proposal yield was capped at 380% (3 standard deviations above the mean)

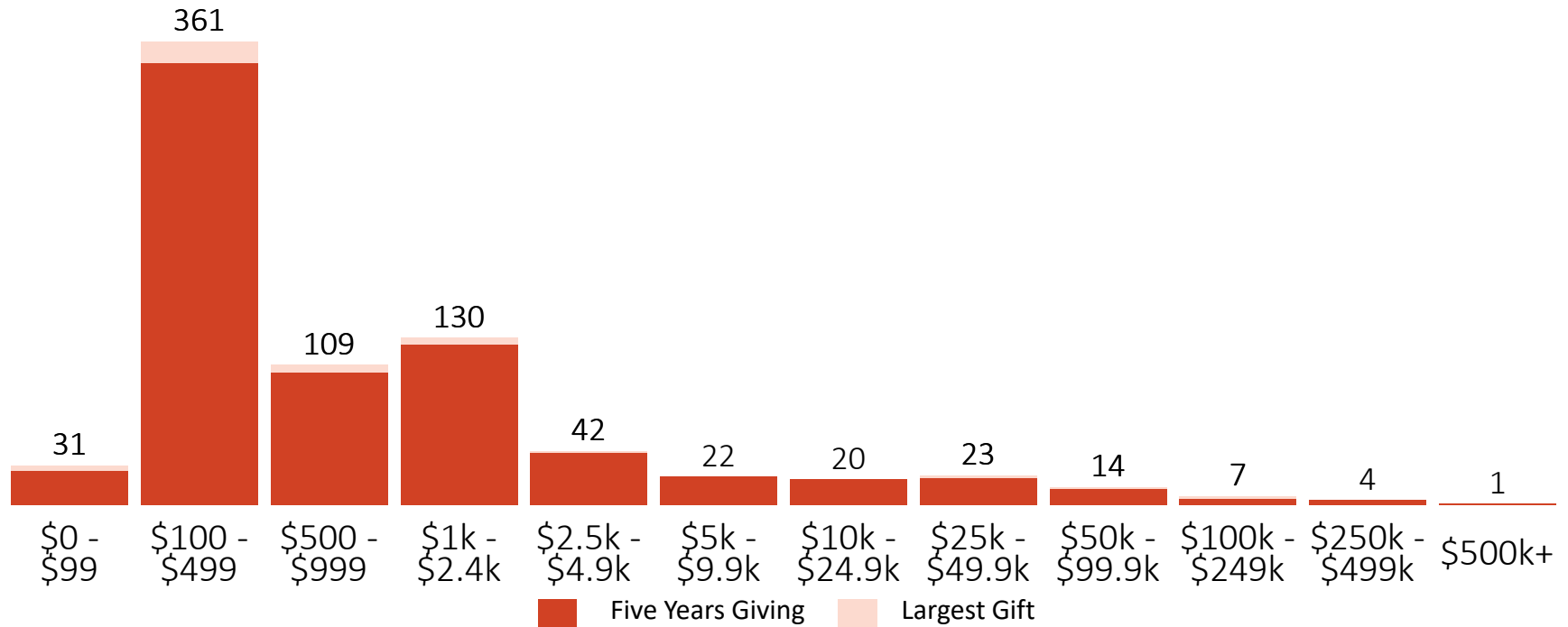


PIPELINE ANALYSIS

OPPORTUNITY TO INCREASE GIVING



TOP PROSPECTS BY LARGEST GIFT

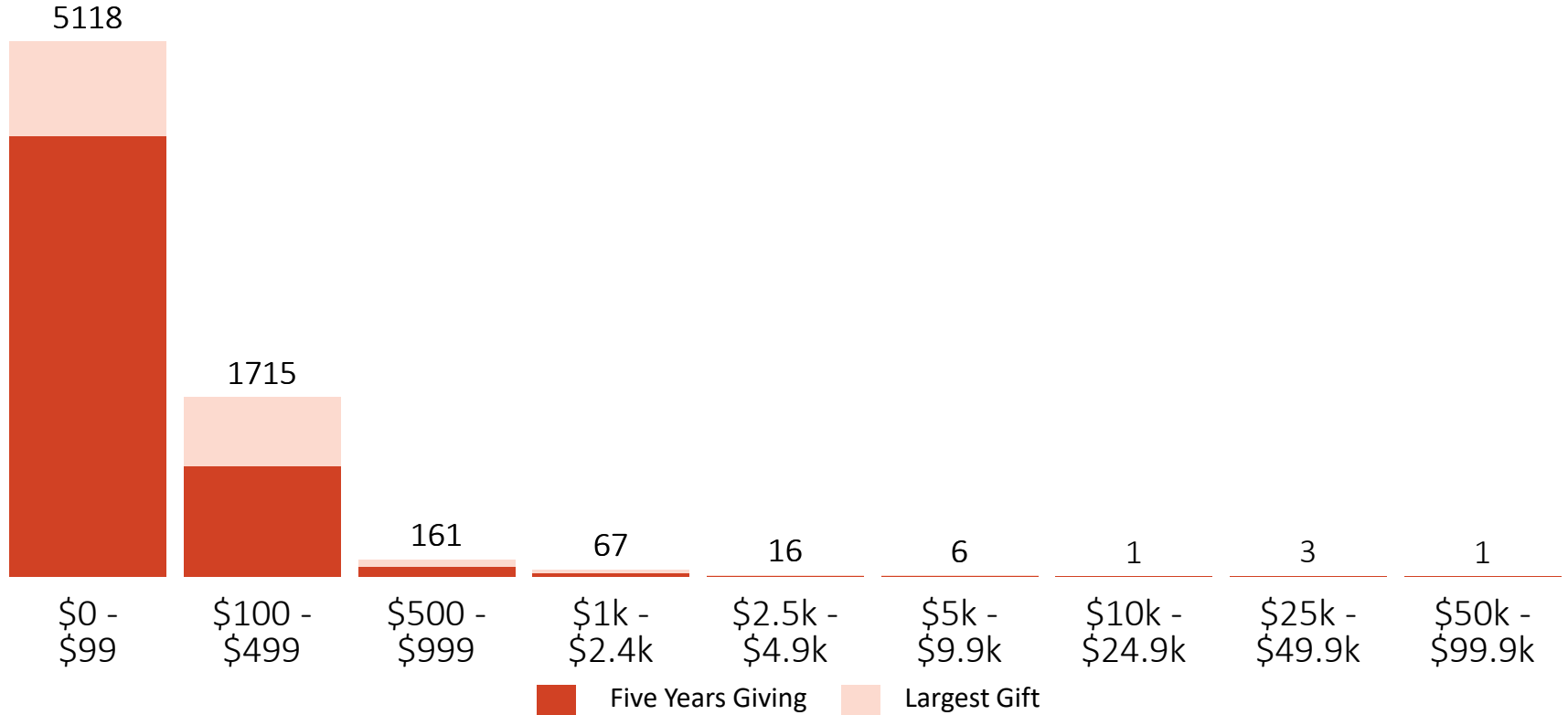


Most Top Prospects are not giving commensurate with their capacity. This marks a significant opportunity to increase giving:

- 65.6% have not given a gift of \$1,000 or more, and
- 90.9% have not given a gift of \$10,000 or more.

LARGEST GIFT OF FUTURE PROSPECTS

\$100K+ FUTURE PROSPECTS BY LARGEST GIFT




94 \$100K+ Future Prospects have made a major gift in the past, but have not made a gift in the last 3 years

CAMPAIGN GOAL



HFH will need to raise \$26.1M over the next 3 years to achieve its \$15M campaign goal while maintaining its previous fundraising efforts of approximately \$3.7M annually




\$11.1M

Maintain pre-campaign fundraising effort



\$15M

Campaign working goal



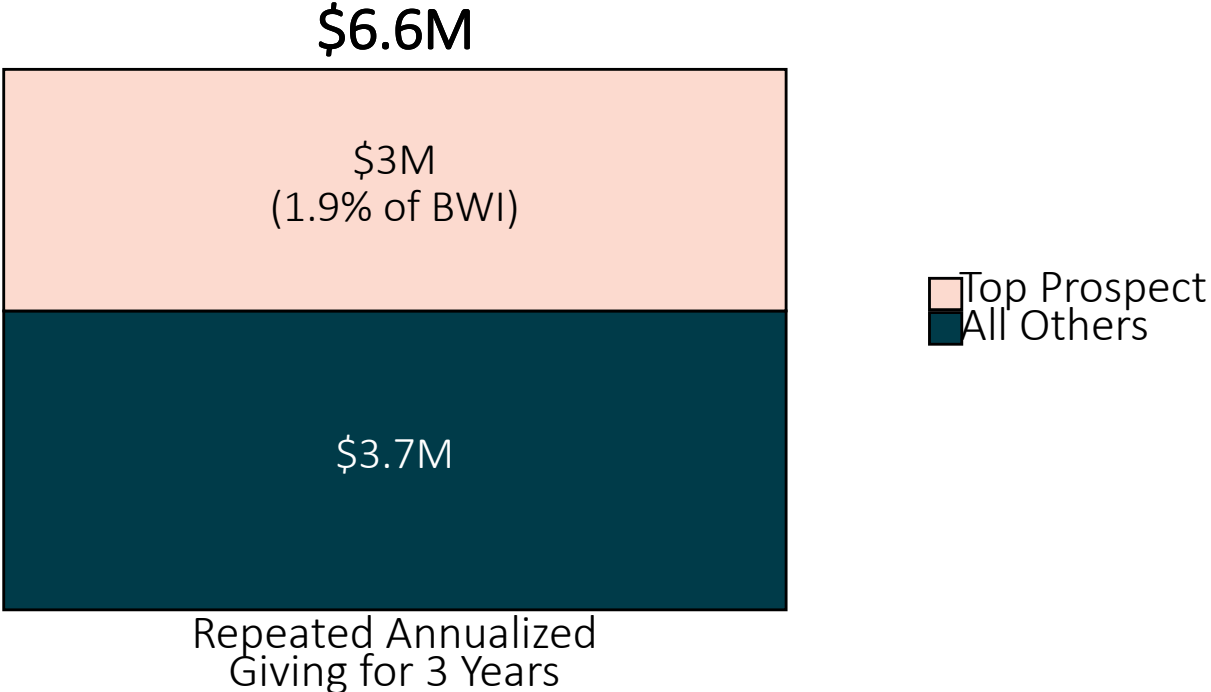
\$26.1M

Annual Fundraising Efforts + Campaign Goal

CAMPAIGN BASELINES

The baseline assumes that anyone who is not a Top Prospect will continue to give, on average, what they have annually* for the next 3 years, which totals \$3.7M.

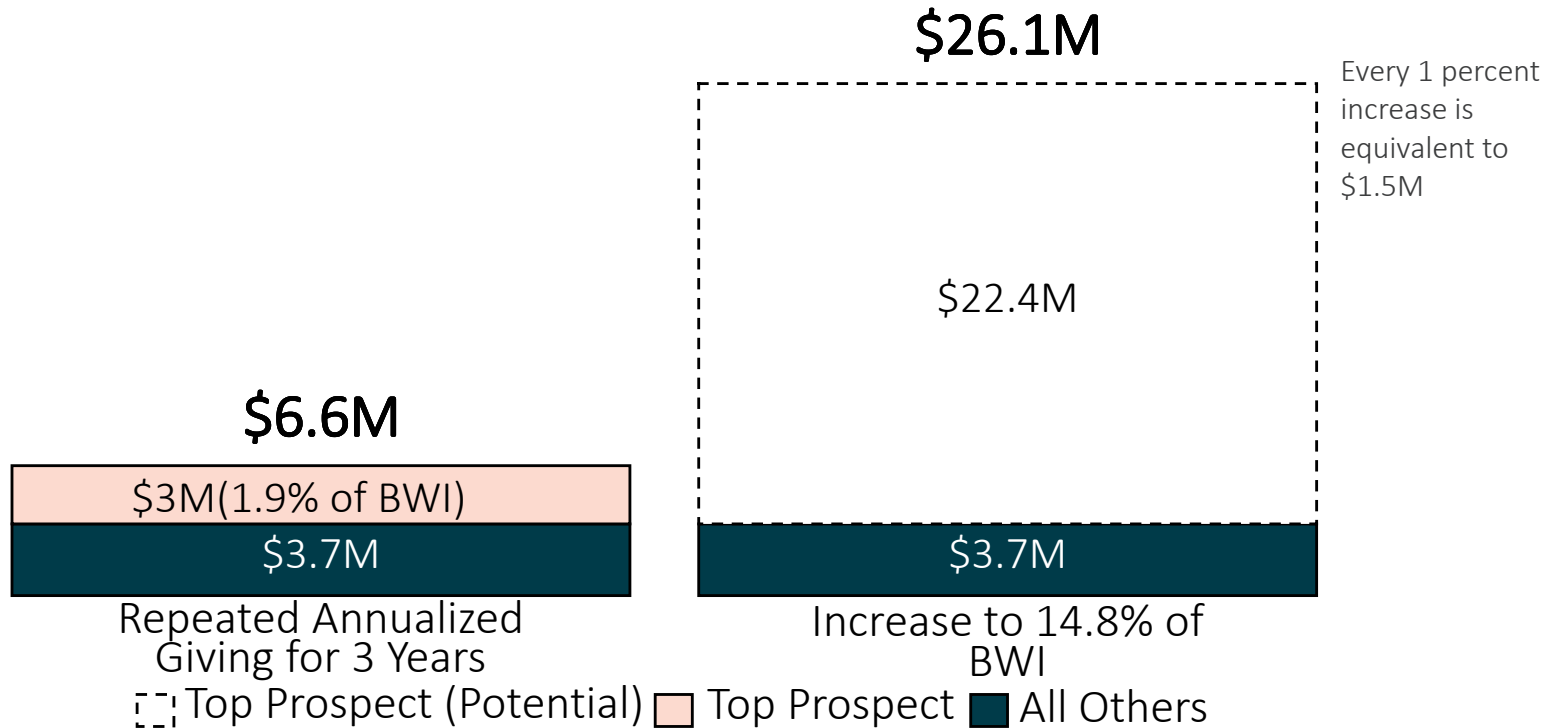
If Top Prospects repeated their annual gift for 3 years, they would give 1.9% of their BWI.



*Annual gift is based on the average of all gifts over the last five years. This includes giving from 22,275 donors who are not Top Prospects. Does not include giving from disqualified donors (e.g. deceased, do not solicit).

CAMPAIGN POTENTIAL

With additional attention from HFH's staff, we assume that Top Prospects will give a greater percentage of their BWI. In the scenario below, we show the increase in giving from Top Prospects that would be necessary for HFH to achieve its campaign goal. **Top Prospects will need to give, on average, 14.8% of BWI for HFH to achieve its goal.**

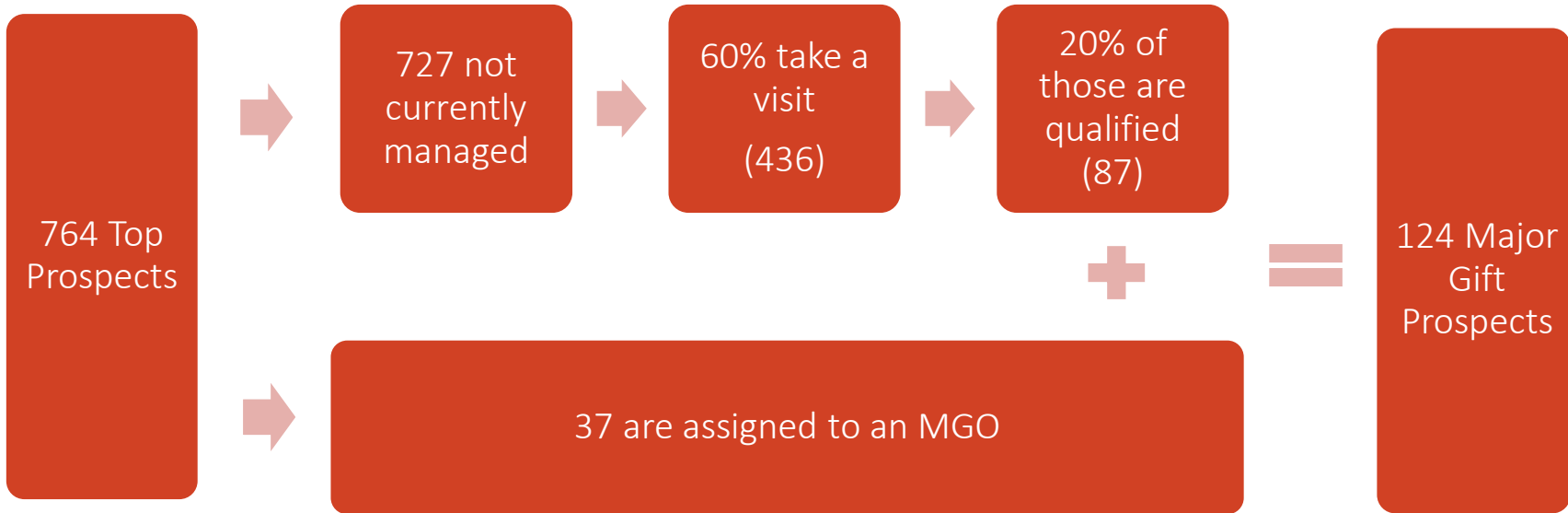


\$15M GIFT TABLE

Gift/Pledge Level	Gifts Needed	Qualified Prospects Needed	Subtotal (\$)	Cumulative (%)	Identified Prospects	Surplus (Gap)	Future Prospects
\$5,000,000	1	3	Not included in totals		4	1	12
\$2,500,000	1	3	\$ 2,500,000	17%	2	(1)	20
\$1,000,000	3	9	\$ 3,000,000	37%	28	19	156
\$500,000	6	18	\$ 3,000,000	57%	65	47	509
\$250,000	8	24	\$ 2,000,000	70%	170	146	1,472
\$100,000	15	45	\$ 1,500,000	80%	495	450	4,919
\$50,000	25	75	\$ 1,250,000	88%	658	583	7,470
\$25,000	40	120	\$ 1,000,000	95%	47	(73)	66
\$10,000	50	150	\$ 500,000	98%	42	(108)	174
Various	Many	Many	\$ 250,000	100%	2,147		77,149
Total Gifts	148	444	\$ 15,000,000		3,658	1,067	91,947

FROM IDENTIFIED TO QUALIFIED

The surpluses in the gift table are based on identified prospects. Using the following assumptions, we can project the number of Top Prospects that will become qualified Major Gift Prospects through visits with staff.



99 \$100K+ qualified prospects are needed for the campaign according to the gift table.

IMPORTANCE OF VISITS FOR MAJOR GIFTS



Qualifying 99 \$100K+ Major Gift Prospects will likely take 706 total visits* (310 qualification visits + 396 cultivation/solicitation visits). If completed over 3 years, that is 19.6 visits per month on average, which requires 1.6 FTE focused on major gifts above \$100K.

The current composition of the staff is 1.4** FTE focused on major gifts, which will allow the HFH to qualify 88 prospects over 3 years. This is sufficient staff for HFH to qualify and solicit all gifts at the \$100K+ level, but additional staff may be needed to qualify remaining major gifts under \$100K.

Scenario	Number of FTEs Making MG Visits	Total Possible Visits Per Month	Top Prospects Cultivated & Solicited (3 Year Campaign)
With current FTE	1.4	16.8	88
Needed for all \$100K gifts	1.6	19.2	99
Needed for all of gift table	8.8	105.6	444

*Assumes 4 additional visits to cultivate/solicit, and 12 visits/month for a major gift FTE.

** Sum of percent of time spent by Deena Prescavage, Jennifer Parls, and Betsy Rubinstein for board, major gift, and corporate foundation relations (form materials review)



NEXT STEPS

NEXT STEPS

- **Upload ratings** created as part of this analysis to Salesforce, particularly BWI and Prospect Status.
- Begin to **qualify major gift prospects** for the upcoming campaign as well as use these ratings to **increase annual giving asks** where appropriate.
 - Focus on the highest capacity Prospects first.
 - Dedicate time to discussing opportunities to more actively engage \$100K+ Future Prospects who have made a gift in the past.

RFM SCORES



C&C created a score for each constituent called a Recency, Frequency, Monetary (RFM) score. The purpose of this score is to reflect a constituent’s giving patterns to HFH as a measure of affinity. The RFM score is from zero to thirty and is made up of three distinct scores of zero to ten. The distribution of each score is displayed below. RFM scores of 24 are in the top 10% of scores.

Score	Recency: Last Gift Date		Frequency: Number of Gifts In Last 10 Years		Monetary: Amount of Gifts In Last 10 Years	
	Minimum	Maximum	Minimum	Maximum	Minimum	Maximum
1	01/01/1992	05/05/2004	1	1	\$0	\$22
2	07/01/2004	12/07/2012			\$22	\$25
3	12/09/2012	06/09/2016			\$25	\$35
4	06/10/2016	12/09/2017			\$35	\$50
5	12/10/2017	06/08/2019			\$50	\$52
6	06/11/2019	03/07/2020			\$52	\$100
7	03/10/2020	02/06/2021			\$100	\$104
8	02/08/2021	10/09/2021	2	2	\$104	\$175
9	10/10/2021	09/08/2022	3	3	\$175	\$367
10	09/09/2022	04/10/2023	4	349	\$369	\$2,500,000