



## 2008 Course Schedule / Location

Location: Porecco Center, West 38<sup>th</sup> Street, Erie, PA; Garden House; Classroom 1

Start Time: 8 AM  
End Time: 11 AM

Session 1 Tuesday, June 17  
Session 2 Tuesday, July 8  
Session 3 Tuesday, August 12  
Session 4 Tuesday, September 9  
Session 5 Tuesday, October 14  
Session 6 Tuesday, November 11

\*Continental breakfast will be served.

## Program Coordinator/Contact

Kim McCaslin, CFRE, Director of Development, Saint Mary's Home of Erie  
[kmccaslin@stmaryshome.org](mailto:kmccaslin@stmaryshome.org)  
(814)836-5312

## Course Materials

The provided text for the course will be Capital Campaigns: Strategies That Work by Andrea Kihlstedt.

## Curriculum

### **Session 1: Get Ready, Get Set...** Tuesday, June 17

Instructors: Mary Temple, CFRE, Director of Development, Visiting Nurse Association of Erie County and William Grant II, CFRE, Regional Vice President, Kearns & Associates

*A capital campaign is an organized, intensive fundraising effort on the part of an organization to secure extraordinary gifts and pledges for a specific purpose (such as building construction, renovation, equipment acquisition, or endowment funds) during a specified period of time. This session will set the stage for conducting a successful campaign and will cover:*

- The Transformative Power of Capital Campaign Fundraising
- Types of Campaigns
- Special Characteristics of Capital Campaigns
- The Phases of a Capital Campaign
- Organization Readiness
- Development Office Readiness

"I would recommend this training to a colleague or co-worker."



**Session 2: Preparing for a Campaign** Tuesday, July 8

Instructor: Kimberly McCaslin, CFRE, Director of Development, Saint Mary's Home of Erie

*This session highlights the importance of cultivating the “people side” of your campaign. Without leaders and volunteers to actually conduct the campaign, your results will not meet your expectations. Building a solid case for support is one of the most important components of the campaign, as is a working gifts table and solid campaign structure. Topics covered in this session include:*

- The Case for Support
- Campaign Goal & Gift Range Chart
- The Feasibility Study
- Volunteer Campaign Leadership
- Defining Staff Roles
- The Board of Directors
- Hiring a Consultant

“Kim has great energy and speaks in layman’s terms—the reality of campaigning versus what is in the book.”

**Session 3: Campaign Structure** Tuesday, August 12

Instructor: Emma Lee McCloskey, Ed.D, CFRE, Executive Director, The Catholic Foundation

*Keeping an organizational effort like a capital campaign moving forward requires organization, planning, and attention to detail. Reports, timelines and technology can all help keep your capital campaign on target. Session Three topics include:*

- Projecting a Realistic Campaign Timetable
- Capital Campaign vs. Annual Giving
- Campaign Budget
- Prospect Research
- Fundraising Database

“I enjoyed your presentation and the experiences you shared with the group. Thank you!”

**Session 4: The Ask** Tuesday, September 9

Instructor: Gary L. Bukowski, CFRE, Vice President for Advancement, Barber National Institute

*After all of the preparation, planning and research, the time finally comes to solicit gifts. Beginning with the quiet phase of the campaign, you will learn about board giving, staff giving and the solicitation of leads gifts. Once the lead gifts are solicited it is time to transition from the quiet phase to the public phase. After the public kickoff, the work of soliciting a broader constituency begins. Topics covered in this session:*

- Soliciting the Board
- Soliciting Lead Gifts
- Techniques for Soliciting Foundations & Corporations
- Challenge Grants
- The Public Campaign Kickoff
- Soliciting Major Gifts
- Soliciting the Broad Base

“Once again—great speaker, relevant topics and examples.”



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### **Session 5: Campaign Communication and Gratitude** \_\_\_\_\_ Tuesday, October 14

Instructor: James W. Martin, CFRE, Strategic Community Initiatives Director, Highmark Blue Cross Blue Shield

*Publications and publicity alone do not raise money, although it is hard to imagine a successful campaign without it. Building momentum for your campaign through communications, activities and strategic public relations is important to the successful implementation of your campaign. Also critical to the campaign is the discipline of gratitude. There the many aspects of expressing gratitude in the context of a capital campaign. Topics to be covered include:*

- Communications Plan
- Campaign Materials
- Managing Campaign Announcements
- Saying Thank You
- Recognizing Donors and Volunteers

“Jim’s experience and ability to field questions about any aspect of a campaign was very valuable.”

### **Session 6: Beyond the Campaign** \_\_\_\_\_ Tuesday, November 11

Instructor: Judy Lawrence, CFRE, Vice President, Major and Planned Gifts, United Way of Erie County

*The final session covers the wrap-up phase of the campaign, emphasizing the importance of tying up loose ends, both externally and internally. It also draws attention to the importance of institutionalizing the powerful lessons learned from the campaign and realizing the potential of major-gift fundraising long after the campaign is finished. Special bonus: Troubleshooting challenging campaign situations!*

- Evaluation
- Reporting
- Stewardship
- Looking Ahead
- Campaign Lessons
- Troubleshooting

“Great job! Lots of good information and personal stories!”



## Faculty Biographies

### Gary L. Bukowski, CFRE

Vice President for Advancement, Dr. Gertrude A. Barber National Institute

In summer 2008, Gary joined the Dr. Gertrude A. Barber National Institute as their first Vice President for Advancement. In that short time, significant strides have been made to grow and enhance the Dr. Gertrude A. Barber Foundation, the fundraising arm of the organization, which serves 3,200 individuals in Erie, Girard, Corry, Warren, Pittsburgh, and Philadelphia. Within months, Gary launched the Barber National Institute's first Annual Fund effort, instituted the *Dr. Gertrude A. Barber Legacy Society*, and is establishing the first donor report in the Institute's 56-year history.

Prior to working at the Barber National Institute, Gary was the Vice President for Institutional Advancement at Mercyhurst College. In his 27 years of advancement service to Mercyhurst, he developed a reputation as the dean of the fundraising profession in the region and was recognized as a willing and able resource for Erie County.

Throughout his tenure at Mercyhurst, he helped raise over \$50 million plus planned gifts from over 65,000 donors. He planned, managed and raised over \$40 million through three capital campaigns conducted at Mercyhurst with the most recent, entitled the **Preserving the Legacy** campaign, raising over \$23,000,000. Some of the successes of that campaign included building the Audrey Hirt Academic Center, the Walker Recital Hall, the Michelle and Tom Ridge Health and Safety Building on the Mercyhurst North East campus, and adding \$10 million to the college's endowment.

Gary was recognized by his peers as an *Outstanding Fund Raising Executive* for the Northwest PA Chapter of NSFRE, now AFP, in May 2000. He also was named *Major Gift Fundraiser of Distinction* by the Institute for Charitable Giving in Denver, Colorado, in March 1997 and was one of the first in our region to earn his CFRE.



### William F. Grant II, CFRE

Regional Vice President, Kearns & Associates



William F. Grant, II, CFRE served as director of development for the Catholic Diocese of Erie, PA for over 15 years. He was responsible for all phases of development activity for the diocese, including parish and school capital campaigns, the annual diocesan stewardship appeal, parish stewardship and sacrificial giving programs, major gift cultivation and planned giving and endowment.

Bill is a founding member and past president of the Northwestern Pennsylvania Chapter of the Association of Fundraising Professionals (AFP). The organization honored him in 2000 as the Outstanding Fundraising Executive of the Year. He earned the Certified Fundraising Executive (CFRE) designation, which is an internationally recognized professional credential for fundraising executives. The CFRE certification also serves as an impartial, third-party endorsement of one's knowledge and experience against international standards in philanthropy. He has served on numerous other professional boards including a board appointment to the International Catholic Stewardship Council.

Bill's community service includes more than thirty leadership appointments in diverse organizations, including: the Estate Planning Council of Erie, PA; National Committee on Planned Giving; Association of Fundraising Professionals board of directors; Eisenhower College Alumni Association; Retirement Fund for Religious Planning Committee; secretary, Shankar Service Foundation Board of Directors (hospital in India); and religious education teacher, Saint Jude Church, Erie, Pennsylvania.



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### **Judy Lawrence, CFRE** **Vice President for Major Gifts and Planned Giving, United Way of Erie County**

During her more than 20 years in fundraising, Judy has held a variety of positions focusing on corporate and foundation relations, prospect research, major gifts, planned giving. Her experience includes work on capital campaigns at three separate universities. For the past nine years, Judy has overseen the growth and development of major gift and planned giving initiatives for United Way of Erie County.

Judy is past president of the Northwestern Pennsylvania Chapter of the Association of Fundraising Professionals and received the Outstanding Fundraising Executive of the Year in 2005. She is currently serving as the Vice President of Educational Programming for the Chapter as well as serving as a member of the Community Fund Drives Committee. Judy has served as an instructor for AFP and United Way of America.



### **James W. Martin, CFRE** **Strategic Community Initiatives Director, Highmark Blue Cross Blue Shield**



As community affairs director of Highmark in Erie/NW region, Jim helps lead the strategic planning, community relations, grant making and sponsorship decision process for the corporation in 11 counties. He has shared his executive leadership experience with scores of organizations throughout the United States, helping these member-driven, not-for-profit organizations increase revenues, expand member programs and gain community support.

Capital Campaigns and comprehensive development programs that Jim has been instrumentally involved with have garnered more than \$47 million for the organizations. He has created and led five health system foundations and numerous community organizations. He has served on dozen's of civic boards and currently serves on four regional community boards and twelve additional community committees.

### **Kimberly McCaslin, CFRE** **Director of Development, Saint Mary's Home of Erie**

Kim became the first, full time development director at Saint Mary's Home of Erie in April 2008. Her newly developed position combines her two passions—strategic planning and major gift fundraising.

Kim began her career in the development office at Penn Lakes Girl Scout Council in 1991. She led the council's first capital campaign raising \$2.2 million — exceeding the campaign goal by \$500,000. During this time she initiated the market survey; recruited, trained and motivated campaign volunteers; created campaign materials; personally solicited major gift prospects and obtained funding from individuals, corporations and foundations.

Named as the Outstanding Fundraising Professional of 2007 by the Association of Fundraising Professionals of Northwestern Pennsylvania (AFP), Kim also holds the credentials of Certified Fund Raising Executive (CFRE), the internationally-recognized professional credential for philanthropic fundraising executives. She is a founding member and past president of AFP and currently serves as nomination chair. In addition, Kim is a member of the Community Fund Drives Committee.





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### **Emma Lee McCloskey, Ed.D., CFRE**

**Executive Director, The Catholic Foundation of the Roman Catholic Diocese of Erie, Inc.**



Dr. Emma Lee McCloskey has been an administrator for educational institutions, religious and healthcare providers since 1990. She is the Executive Director of The Catholic Foundation for the 13 county Erie Diocese and oversees the Diocesan Development Program including the Catholic Services Appeal, Annual Appeals, Catholic Charities Development and Marketing and the Annual Catholic Charities Ball. Prior to this, she was Director of Development and Marketing for Catholic Charities which serves 56,000 persons annually through its Diocesan Affiliate organizations and programs. Dr. McCloskey has worked with donors to establish two planned giving societies, developed major giving programs and has run a successful capital campaign.

She earned a Doctorate in Education from Duquesne University with a concentration in organizational leadership and holds two masters having graduated from Gannon and Penn State University. She attended the AFP Faculty Training Academy, a collaborative initiative of AFP and The Indiana University.

Dr. McCloskey is President of The Nonprofit Partnership; Board Member of Mercyhurst Preparatory School; Member of the Estate Planning Council of Erie, Association of Fund Raising Professionals, Our Lady of Mercy Parish and Erie Ski Club.

### **Mary Temple, CFRE**

**Director of Development, Visiting Nurse Association of Erie County**

Mary Temple has nearly twenty-five years of experience in many aspects of development and fund raising. She has held her current position since 1996 and previously served as director of development for Mercyhurst Preparatory School from 1982 to 1996.

Mary's development experience includes program initiation, prospect research, volunteer management, annual giving programs, special events, grant writing, planned giving, public relations, capital and endowment campaigns, and independent consulting.

Mary is a founding member and past president of AFP, Northwestern PA Chapter and served as an officer or committee chair for the organization for eleven consecutive years. In 1999, Mary became the first woman in northwest Pennsylvania to attain professional certification (CFRE). In 2000 she was named AFP's local Outstanding Fundraising Executive and in 2006 was named one of twelve Women Making History in Erie by the Mercy Center for Women.





**Association of Fundraising Professionals  
2008 Capital Campaign Coaching Program**

**Application Form**

Organization Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Our organization is considering a capital campaign in \_\_\_\_\_.  
(year)

Participants in the program (suggested participants include the Executive Director, Development Director, Development Committee Chair or Board Chair):

Name	Title	Phone	E-mail address

Check enclosed for program fee: \$800 AFP member rate; \$1,000 non-member rate

Please indicate which participant is an AFP member to qualify for discounted rate: \_\_\_\_\_. Only one participant per organization needs to be an AFP member to qualify.

Please make checks payable to “**AFP, Northwestern PA Chapter.**”

Submit payment, application and signed participation agreement by May 15, 2008 to:

Northwestern PA Chapter, AFP  
Capital Campaign Registration  
c/o Dawn Johnson  
Chapter Administrator  
105 Hillcrest Drive  
Edinboro, PA 16412

