

Supporting an organization through a capital campaign

I. Objectives:

To assist organizations to develop a successful approach and capacities for capital fundraising in the context of ongoing strategic planning and development efforts.

To provide consultation and technical support based on the leadership needs and desires.

The approach will focus on:

1. Education and capacity building for the organizations volunteer and staff leaders,
2. Onsite meetings for specific time periods to be used for intensive work and provision of trainings,
3. Meetings by phone or Skype with online review of materials and for Q&A and to provide remote ongoing support.

II. Phases of the campaign

1. Planning - feasibility study, budget, infrastructure, etc.
2. Quiet – Lead gift solicitation, grants, etc.
3. Public – Individual gifts, PR, Events, Stewardship, etc.

III. Activities within these phases

1. Planning Phase
 - i. Case Development
 - ii. Feasibility Study
 - iii. Planning
 - iv. Infrastructure
 - v. Theme and Materials
 - vi. Committee Development
 - vii. Foundation and Corporate Strategies
2. Quiet Phase
 - i. Volunteer Management
 - ii. Prospect Identification and Rating
 - iii. Naming Opportunities and Donor Recognition
 - iv. Solicitation
3. Public Phase
 - i. Communications and PR
 - ii. Events and Celebrations
 - iii. Relationship with Annual and Planned Giving
 - iv. Campaigning during Construction
 - v. Building on the Momentum of Success



vi. Stewardship

IV. Planning Phase

1. Planning Tasks

- i. Review of quiet and public phases of the campaign and appropriate goals for these phases
- ii. Identification of campaign honorary and functional chairs and key staff and volunteers
- iii. Development of a campaign and a capital project budget
- iv. Coordination of efforts with the architect and construction team regarding campaign related drawings and construction budgets (including soft costs and FFE)
- v. Further refinement of gift range chart
- vi. Training and support regarding volunteers needed and Board's Commitment
- vii. Preparation of formal resolution to accept budgets and approve campaign plans

2. Case Development

- i. Review of strategic plans and where the capital project fits into these plans
- ii. Assistance in articulation of the case in terms of organizational values, community needs, and communications value

3. Feasibility Study

- i. Interviews with 20 – 30 serious prospects capable of making lead gifts to gather a sense of their interest in the project and their inclination to make lead gifts and needed levels
- ii. Budget Development in tandem with Architect and Construction Team
- iii. Development of a gift range chart and review of the universe of givers associated with the organization
- iv. Presentation of a report to campaign and organization leaders
- v. Confirmation or revision of goals based on feasibility and budget constraints

4. Infrastructure Assessment

- i. Review of staffing needs and recommendations
- ii. Review of accounting plans
- iii. Review of fundraising software
- iv. Development of any needed gift acceptance policies
- v. Review of volunteer recruitment and management tools
- vi. Support for decisions regarding vendors for marketing, advertising, materials development, construction team, and front office management

5. Theme and Materials



- i. Assistance in developing campaign marketing themes, logos, style guides in order to successfully create a campaign identity
 - ii. Review and consultation of solicitation and communications materials
- 6. Committee Development – assistance in the training and campaign job descriptions for the following committees will be needed:
 - i. Core staff team
 - ii. Board Executive Committee
 - iii. Board Finance Committee
 - iv. Campaign Steering Committee
 - v. Volunteer Coordination team
 - vi. Events team
 - vii. PR oversight team

V. Quiet Phase – Lead gifts & Grants

- 1. Volunteer Management
 - i. Development of job descriptions
 - ii. Development of delegation policies and mechanisms for accountability
 - iii. Creation of a volunteer handbook
 - iv. Creation of volunteer training modules
- 2. Prospect Identification and Rating
 - i. Review of fundraising history and existing prospects
 - ii. Identification of community leaders with possible interest
 - iii. Develop a gift range chart in keeping with campaign goals
 - iv. Rate individual gift prospects in collaboration with key community informants
 - v. Naming Opportunities and Donor Recognition
 - vi. Review and develop naming opportunities policy
 - vii. Identify naming opportunities in collaboration with architects and construction team
 - viii. Identify other recognition items desired
- 3. Solicitation
 - i. Initiate solicitation to achieve 100% Board participation
 - ii. Identify volunteers and staff who will participate actively in solicitation
 - iii. Provide training regarding solicitation and accountability
 - iv. Provide materials and gift acceptance policies to volunteers
 - v. Identify solicitation captains to assist in accountability and follow through
- 4. Foundation and Corporate Strategies
 - i. Identify local and national foundations to be cultivated
 - ii. Seek informational interviews with key foundation program staff
 - iii. Identify grant writer



- iv. Review applications and materials for consistency with campaign case, themes, and budgets
- v. Identify potential corporate partners including vendors to the organization and apply similarly to foundations or approach corporate leaders in the same manner as individual prospects

VI. Public Phase – General Solicitation, Events, Stewardship

1. Prospect Identification and Rating
 - i. Review of fundraising history and existing prospects
 - ii. Identification of community members with possible interest
 - iii. Develop a revised gift range chart in keeping with campaign goals
 - iv. Rate individual gift prospects in collaboration with key community informants
2. Solicitation
 - i. Initiate solicitation to achieve 100% Board participation
 - ii. Identify volunteers and staff who will participate actively in solicitation
 - iii. Provide training regarding solicitation and accountability
 - iv. Provide materials and gift acceptance policies to volunteers
 - v. Identify solicitation captains to assist in accountability and follow through
3. Communications and PR
 - i. Identify market segments and communication strategies for each
 - ii. Identify PR and advertising vendors
 - iii. Identify social media communications strategies to be implemented
 - iv. Identify key donors to receive personal and snail-mail updates
4. Events and Celebrations
 - i. Identify and tentatively calendar events and celebrations
 1. Campaign kickoff
 2. Fundraising and friend-raising events
 3. Celebration of campaign phase completions
 4. Groundbreaking
 5. Dusty Shoe tours during construction
 6. Ribbon Cutting/Dedication
 - ii. Assign and delegate to a trained and supported committee
 - iii. Engage PR Committee for support and materials
5. Relationship with Annual and Planned Giving Fundraising
 - i. Consider comprehensive ask techniques
 - ii. Identify strategies for annual gifts during capital campaign e.g. are some constituent groups set aside for annual efforts? Does timing of annual asks get modified?



6. Campaigning during construction
 - i. Dusty Shoe Tours.
 - ii. Staff Training solicitations for new program models.
7. Building on the momentum of success
 - i. Many givers will become planned giving prospects
 - ii. Increase annual goals
 - iii. Stewardship of donor relationships to maintain ongoing capacity
 1. Ongoing communication
 2. Special donor and friends gatherings
 3. Directed PR

