Capital Campaigns:

The 4 Things You Need to Have in Place Before You Launch

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- Recording
- Survey
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- Chat is open
- To ask a question, please use the Q&A function/icon
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Today's Presenters





Today's Agenda





The 4 Things Revealed



POLL: Where are you in planning for a capital campaign?



Achieving Your Vision

Case for Support

- Why philanthropy?
- Societal benefits Organizational competence
- Problem / solution

Feasibility or Campaign **Planning Study**

- Image of the organization
- Appeal of the project
- Financial support
- Volunteer leadership
- Climate and timing
- Internal readiness
- Timeframe: ~4-5 months
- · Outcome: goal, roadmap

Project

- Development
 - Project concept
 - Preliminary budget
 - Board approval

Strategic Planning

- Mission
- Community needs
- Strategic priorities

Vision Realized

Campaign:

Community Phase

Campaign: **Major Gifts** Phase

- Expand volunteer leadership
- Secure major gifts
- Secure employee gifts
- Engage special constituencies
- Timeframe: 12-24 months
- Outcome: ~70-85% of goal

- Publicly announce campaign
- Hold kickoff events
- Conclude pending solicitations
- Make presentations to community groups
- Conduct organization and community appeals
- Hold celebration events
- Timeframe: 6-12 months
- Outcome: 100% of goal

• Solidify project scope and goal

- Refine internal systems/staffing
- Establish top level volunteer leadership
- Finalize case statement

Campaign:

Planning and Lead

Gifts Phase

- Train staff, Board and campaign leaders
- Create tailored major gift materials
- Secure lead aifts

- Secure Board and campaign leadership gifts
- Timeframe: 9-15 months
- Outcome: ~30-50% of goal

1. Planning and Vision



- Mission
- Vision
- Values
- Strategic Priority
- Goals and outcomes
- Objectives



2. Project Development



- Project concept
- Preliminary Budget
- Board endorsement and approval



3. Articulate Value Proposition, Societal Need and Proposed Solution



- Demonstrate organizational competence
 - Solid Footing
 - Fiscally Responsible
 - History of meeting societal needs
 - Demonstrated fundraising and stewardship success
- What are the needs that are currently not being met?
- How is your organization uniquely positioned to meet this need?
- How will this project, once realized, impact or benefit the people you serve?
- What will it cost?

Case Prospectus



- Describe the project
- State the case for the project's aim, purpose and mission
- Articulate why this must occur
- Illustrate how the change will occur
- Demonstrate how philanthropic support will make this possible and show the impact it will have on the lives of people you serve

4. Launch the Study



Organizational Alignment

- Clarify the study process and confirm timelines.
- Define roles and responsibilities.
- Identify potential donors and community members for stakeholder engagement.

Case Prospectus

- Articulate your vision and strategic priorities.
- Convey the urgency
- Communicate impact
- Elevate philanthropic opportunities available

Activities

- Engage key staff and volunteers
- Confirm the vision and the strategic direction
- Present your vision for the future to community members, prospective donors and leaders
- Solicit feedback to inform key messages

Results

- Inform, cultivate and engage prospective donors and leaders
- Clear and compelling messaging defined
- Timeline, Goal and Roadmap for Campaign

Test Message and Goal



- How are you perceived in the community?
- Do your prospective donors find your proposed project(s) compelling?
- How much can you raise?
- Do you have the leadership in place internally and externally
- Do you have the staff and systems in place to take on this additional effort?
- Is this the right time for the organization, your donors, your community?

Elements for Campaign Success - Planning Study



Image & Reputation

Assess overall image and reputation among diverse and representative constituencies

Appeal

Assess the appeal of campaign priorities

(3)

Gift Potential

Assess and offer insight on a potential philanthropic goal and gift opportunities

Areas of Analysis 4)

Leadership

Assess the effectiveness and diversity of leadership structures and consider enhancements

5

Internal Readiness

Assess capacity to successfully manage the campaign



Climate & Timing

Consider current realities, the virtual environment and philanthropic climate or the campaign

Planning Study Process





MONTHS 1-3

Articulate vision and strategic priorities

MONTHS 4-6

Engage, cultivate, prepare and plan



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Q & **A**

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