

KEY ELEMENTS OF CAPITAL CAMPAIGN PLANNING

To ensure that an organization launches rather than lurches into a major fundraising campaign there are three essential elements to consider in both planning and conducting a successful capital campaign:

- The Appeal
- The People
- The Support

The Appeal

Campaign Goal and Strategy

Determine a campaign dollar goal and general fundraising strategy which will guide subsequent campaign planning and conduct.

- An initial “working” campaign dollar goal should be based on projected costs of new and/or renovated facilities; new and/or expanded major programs and projects; anticipated campaign costs.
- A general fundraising strategy should be based on a combination of prior campaign experience; results of a campaign feasibility study; evaluation of potential major donors; enlistment of volunteer leadership; assessment of internal management and systems readiness.

Campaign Case

Determine those key points to be stressed in fundraising statements which underscore the compelling need and persuasive merit for meeting in a timely manner the organization’s expressed funding objectives.

Campaign Donor Recognition

Identify and describe appropriate opportunities for permanent and prominent recognition of major donors and volunteers in the campaign.

The People

Campaign Volunteer Leadership

Formulate the most effective organizational structure and responsibilities for the campaign's volunteer leadership, and enlist men and women most capable and willing to take-on that important leadership.

Potential Major Donors

Identify potential major donors in both numbers and at "target" gift levels suggested by a preliminary Campaign Gift Model. This identification process should include each potential major donor's:

- Suggested/expressed interest in the organization and its expressed funding objectives
- "Target" gift level based on prior gift commitments and/or judged financial capacity
- Best person(s) to encourage, at the appropriate time, the potential donor to contribute

Campaign Staff and Counsel

Assign professional staff as necessary over the course of the campaign to provide for essential campaign management including solicitation strategies, volunteer staffing, prospect research, grant proposal submissions, donor records and stewardship, and constituency communications.

Retain campaign counsel to the extent needed based on professional staff campaign experience and time availability as well as the need to provide objective assessment of campaign planning and progress.

The Support

Campaign Budget

Determine the needed professional staff, office space and equipment, and expenditure budget required to support the campaign to successful conclusion.

Campaign Brochures and Presentations

Identify and develop materials necessary to support campaign fundraising including audio/visual presentations, campaign brochures, volunteer guides, and constituency communication materials.

Campaign Systems and Procedures

Ensure that the most efficient systems and procedures are in place for the receipt, deposit, acknowledgment, recording and reporting of all campaign contributions, grants and pledges.