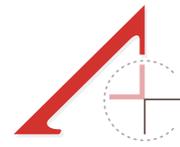


So You Want to Have a Capital Campaign?



Advancement Consulting
Helping you move your organization forward
www.advancementconsulting.com

Basic Elements of Pre-Campaign Planning and Preparation¹

Fundamental Fundraising Capacity

- Build a significant base of loyal financial contributors, including a track record of 100% annual giving among board members.
- Achieve broad, positive community awareness and appreciation of the organization, its mission and programs as charitable priorities.
- Create/maintain a comprehensive information system for managing donor/prospect information, contact reports, pledges and gift transactions.
- Acquire staff capacity to mount and manage a major fundraising campaign.
- Develop a proven case for annual financial support, and a strong case for support of the proposed campaign objectives.
- Establish a track record of enthusiastic, effective board involvement in community outreach and fundraising on behalf of the organization.
- Achieve leadership capacity (board, campaign and staff combined) to collectively contribute significantly toward the overall capital goal.
- Demonstrate enthusiasm for the proposed capital project among board members, prospective campaign leaders and other prospects for major financial support.

Fundamental Organizational Planning

- Complete a clear, compelling strategic plan (mission, purpose, assessment of community need, vision, goals, objectives, anticipated outcomes and methods of evaluation).
- Design and develop new programs/initiatives.
- Finalize a facilities plan to accommodate desired programs.
- Project a sustainable post-construction operating budget (five-year budget pro-forma recommended).
- Revise the organization's communications plan.
- Formulate a financial plan for the project and campaign.
- Develop the board as appropriate to oversee future success.

¹ Adapted and expanded from Stanley Weinstein ACFRE, EMBA, Capital Campaigns from the Ground Up: How Nonprofits Can Have the Buildings of Their Dreams, John Wiley & Sons, Inc. 2004.

Capital Project Preparation

- Complete preliminary architectural designs.
- Evaluate and select the construction site.
- Complete all environmental impact analyses.
- Engage the neighborhood (educate, poll, meet).
- Assess the traffic and parking situation.
- Procure preliminary engineering drawings, schematics.
- Complete preliminary architectural models.
- Identify financing issues and evaluate options.

Campaign Preparation

- Recruit and select consultant to perform pre-campaign planning and readiness study.²
- Form pre-campaign study committee.
- Develop case prospectus (a.k.a. preliminary case for support).
- Begin donor/prospect cultivation and communications.
- Conduct campaign planning and readiness study interviews and surveys.
- Refine capital project planning based on study results.
- Draft a campaign plan.
- Obtain enthusiastic Board approval to move forward.
- Secure internal resources (e.g. staffing, equipment, records systems, etc.) to support capital campaign efforts.
- Secure financial commitments from the Board and executive team.
- Recruit campaign leadership.

² Note: Pre-campaign planning and readiness studies (sometimes called “feasibility studies”) may be unnecessary under certain specific circumstances.