Adapting Tried & True Strategies to your Unique Capital Campaign

2018 Capital Conference
September 26, 2018

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Capital Campaigns are…

• an intense effort
• to raise significant dollars
• in a specified period of time
• for a one-time or focused need
• like the construction of a facility, the purchase of equipment, or the acquisition of endowment

A Transformative Process

A successful campaign is not an event but a transformative process …

• Builds assets, programs, endowment
• Increases organizational recognition
• Builds team spirit
• Improves annual giving
• Take your fund raising to a new level
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Learning Objectives

1. Describe the 7 key ingredients of a successful campaign.
2. Understand the tried and true strategies that maximize your chances for success and how they can be adapted to your unique situation.
3. Learn steps you can take now to begin preparing for a campaign in your future.

Requirements of a Successful Campaign

- Supporters must have confidence
- Case for support understood and accepted
- Influential and committed Board(s)
- Donors with capability at necessary giving levels

Requirements of a Successful Campaign

- Strong volunteer leadership
- Well-organized and staffed
- Culture of Philanthropy and appropriate timing
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Requirements of a Successful Campaign

Image and Confidence

- Image and reputation
- Is it well-known?
- Does it make a difference?
- Is it effective?
- Perceptions of mission, administration and board effectiveness

Requirements of a Successful Campaign

Case for Support

- Is the case for support compelling and urgent?
- Tied to your organization’s vision and strategic plan?
- Always in line with mission?
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Requirements of a Successful Campaign
Committed Board

- 100% are donors
- Organization is a philanthropic priority
- Together give 10% to 20% or more of goal
- Board development and engagement in philanthropic process is key

Requirements of a Successful Campaign
Capable Prospective Donors

- Top gift may be 15 - 25% of total
- Top 10 gifts equal 60 - 65% of the total
- Planning study seeks to identify 40 – 60% of available gifts
  - As many as 250 – 400 prospects
  - 3 to 5 prospects per gift

Sample Gift Table $5,000,000

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<th>Number of Gifts Required</th>
<th>Number of Prospects Required</th>
<th>Minimum Gift Size</th>
<th>Total at this Level</th>
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<td>$5,000,000</td>
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</tbody>
</table>
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Requirements of a Successful Campaign

Volunteer Leaders
- Campaigns require strong volunteer leadership and involvement
- Planning study engages volunteers to lead, solicit, open doors, host
- Helps to identify others who will be good leaders

Requirements of a Successful Campaign

Organizational Capability
- Staff Resources
- Technology Resources
- Policies and Procedures

Requirements of a Successful Campaign

Environment & Timing
- Economic conditions
- Other campaigns in region
- Realistic expectations & support
- Engagement of organization’s leadership
- Culture of Philanthropy
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Phases of a Capital Campaign
Preparation and planning
Quiet phase
- Lead 1:1 solicitations
- Advance insider gifts
- 50% to 70% of goal
Public phase
- 1:1 solicitations by campaign organization
Wrap-up – direct mail, peer-to-peer campaigns

A Transformative Process
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- Improves annual giving

Thank You!