

**“Constructing a Successful Capital Campaign”**

**OR**

**“Getting Your Ducks In A Row!”**



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## FIVE TENETS OF A SUCCESSFUL CAMPAIGN

- *Process Creates Potential*
- *A Campaign Is A Series Of Connected Activities*
- *Early Support Builds Momentum And Credibility*
- *A Campaign Case Is About Vision, Dreams, Beliefs And Mission ... Not Needs*
- *People Give To People Because They Are Asked*

## PHASES OF A SUCCESSFUL CAMPAIGN

- *Phase One - Evaluation and Consensus*
  - ◇ Evaluate commitment to a campaign as opposed to commitment to a new building
  - ◇ Determine board readiness
    - Board Retreat:
      - Issue One - Image and Reputation.*
      - Issue Two - Case for Support*
      - Issue Three - Leadership*
      - Issue Four - Prospects*
  - ◇ Assess development office

- *Phase Two - "Feasibility Study" or "Pre-Campaign Planning Study"*

The study evaluates:

- ◇ image in the community
- ◇ how the case for fund raising is viewed by leaders and donors
- ◇ whether quality leaders are available to help in the campaign
- ◇ prospective donors and potential giving levels
- ◇ whether proper resources are available to conduct a campaign
- ◇ detailed, comprehensive fund-raising plan is developed

Information is gathered during the study via four methods:

- ◇ *Personal Interviews*
- ◇ *Direct Mail Surveys*
- ◇ *Focus Groups*
- ◇ *Research*

The Pre-Campaign Planning Study Report should include:

- ◇ private Executive Summary outlining specific prospects' and leaders' opinions about the organization and case
- ◇ opinions regarding feasibility of site selection, funding opportunities, growth potential for the organization, potential areas of service...
- ◇ outline of a fund raising plan discussing how the campaign should unfold
- ◇ any identified prospective donors including friends, constituents, potential major donors, and state and local leaders

- *Phase Three – Organization Phase*

This phase creates the tools necessary for fund raising.

- ◇ Leadership Plan Book
- ◇ Fund Raising Prospectus
- ◇ Fund Raising Brochure
- ◇ Video Presentation
- ◇ Develop Campaign Theme
- ◇ Case Statement
- ◇ Leadership Recruitment
- ◇ Public Relations Effort
- ◇ Detailed Corporate and Foundation Research

- *Phase Four – Solicitation Phase*

- *Phase Five – Post-Campaign*

## TIMELINES

For general guideline purposes only:

- A campaign up to \$1 million should be completed in less than 12 months.
- Campaigns between \$1 million and \$5 million should take between 15 months and two years.
- Campaigns from \$5 million to \$25 million should take between 18 months and 30 months.
- Campaigns over \$25 million are too varied to draw even general guidelines for and the timeline should be developed as part of a pre-campaign planning study.

## TOP TEN REASONS WHY CAMPAIGNS FAIL

1. "If we need a million dollars, all we need to do is get 1,000 people to give us \$1,000 each."
2. "There is no way 'Mr. Smith' will make a gift to this campaign ... he doesn't give!"
3. "Let's do the first part, and then see how that goes before we decide how to do the rest of it."
4. "There is no way I can ask anyone for that much money."
5. "I'm donating my time; I shouldn't have to make a sacrificial or any other type of gift."
6. "This campaign will last until it is finished ... even if it takes years!"
7. "We raise a lot of money every year; we can easily do a capital campaign."
8. "We can save a lot of money by 'piggybacking' on our current development efforts."
9. "We have to get a lot of publicity. Once people know why we need this money, people will gladly give."
10. "Fund raising counsel is too expensive. Our own staff can do it and we have a couple of board members who have been chairpersons of some other campaigns."