



Preparation



“Forewarned, forearmed; to be prepared is half the victory.”

-Miguel de Cervantes

Planning



Is **NOW** the time?

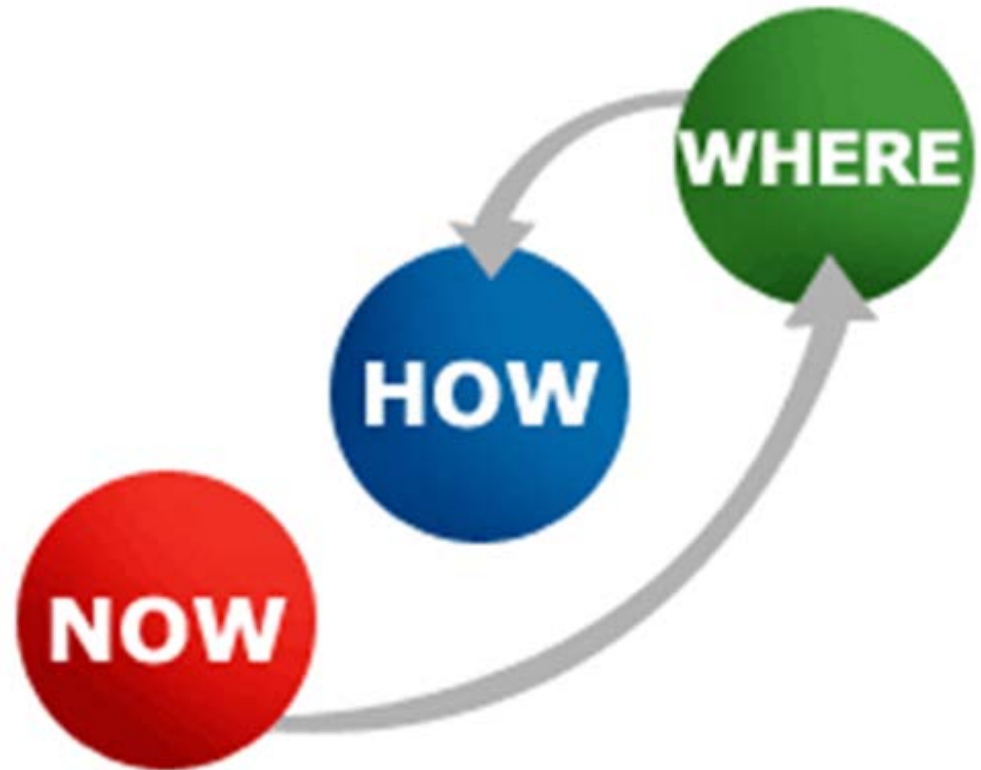
- Research / Needs Survey
- Develop Case for Support
- Feasibility Study

WHERE do we want to go?

- Defined Goals
- Ultimate Outcomes

HOW will we get there?

- Team/Staffing
- Logic Model
- Work Plan (Objectives, Key Steps, Responsible Parties, Timeline)



Research / Needs Study

1,000 Questions – 1,001 Answers



- What is our reason for raising money?
- Define campaign goal that reflects entire campaign.
- Draft of preliminary case for support.
- Starting with the board, create a list of your potential lead donors.
- Engage potential lead donors in visioning about project.
- Create a gift pyramid.
- Discuss campaign plans, strategy and leadership roles.
- Campaign Planning Study

Board Involvement



- Inform board and leadership about capital campaign plans and strategy.
- Educate board about their role in capital campaign.



Case for Support

Who, What, When, Where, Why?



Who? Target population, community, beneficiaries

What? Goal, objectives, story, testimonies

When? Timeline, milestones

Where? Location, demographics

Why? Experience, qualifications, subject matter experts

“If the story is not about the hearer, he will not listen.”

--John Steinbeck, East of Eden

Campaign Feasibility Study Goals



1. Identify and engage top donors.
2. Conduct/adapt planning study.
3. Review results.
4. Revise goals/objectives.



Feasibility Study - Example



What is your general impression of Zippy 123 Non-Profit in the community? Why?

1. Very positive
2. Somewhat positive
3. Somewhat unfavorable
4. Very Unfavorable
5. No opinion / unaware

Do you agree with the need for the proposed capital campaign plan? Why?

1. Yes
2. No

How important is the capital campaign plan?

1. High priority
2. Necessary
3. Low priority
4. Unnecessary

Feasibility Study – Example Continued



In your opinion, is the proposed capital campaign goal realistic and attainable?

Would you be willing to accept a leadership position in the campaign? Make a personal contribution to the campaign?

Are you aware of any other current or planned campaigns?

How would you assess the proposed timing for the campaign?

Be Realistic



“There's many a slip 'twixt the cup and the lips.”

-English proverb

Define Achievable Campaign Goals



- How much will our needs cost?
- How much is enough?



Accurate cost projections are key to ultimately meeting the organization mission once achieved.

Logic Model - Example



Goals →→	Assumptions →→	Inputs →→	Target Population →→	Activities →→	Outputs →→	Outcomes
Establish 5 permanent housing units for families with children	Target population needs affordable housing	Non-profit team Stakeholders Civic leaders Grants Donation Community	Very low-income families with children	Planning Quiet phase Kick off Public phase	# of families served	5 families obtain permanent housing and do not become homeless

Work Plan - Example



Major	Key Tasks	Person Responsible	Start	End
Planning	<ul style="list-style-type: none"> Establish initial leadership 	Executive Director	1/1	2/28
	<ul style="list-style-type: none"> Research/needs survey 	Board President		
	<ul style="list-style-type: none"> Feasibility study Define goals / objectives Develop case for support Develop capital campaign team including staff with job descriptions Develop Logic Model Develop Work Plan with timeline 	Executive Director Board President Development Team	3/1	3/31
Quiet Phase	<ul style="list-style-type: none"> Continue planning Identify/Secure lead gifts Identify/Secure board gifts 	Capital Campaign Team	4/1	6/30
Kick-Off	<ul style="list-style-type: none"> Media Scheduled donor calls 	Capital Campaign Team	7/1	9/30
Public Phase	<ul style="list-style-type: none"> Major gifts General gifts Celebration! 	Capital Campaign Team	10/1	12/31

Quiet Phase



- Continue planning
- Lead gifts
- Board gifts

Identify Lead Donors



- Create list of potential lead donors.
- Start with your board. **100%** participation.



- Engage lead donors in conversations about project.

Gift Pyramid - Example



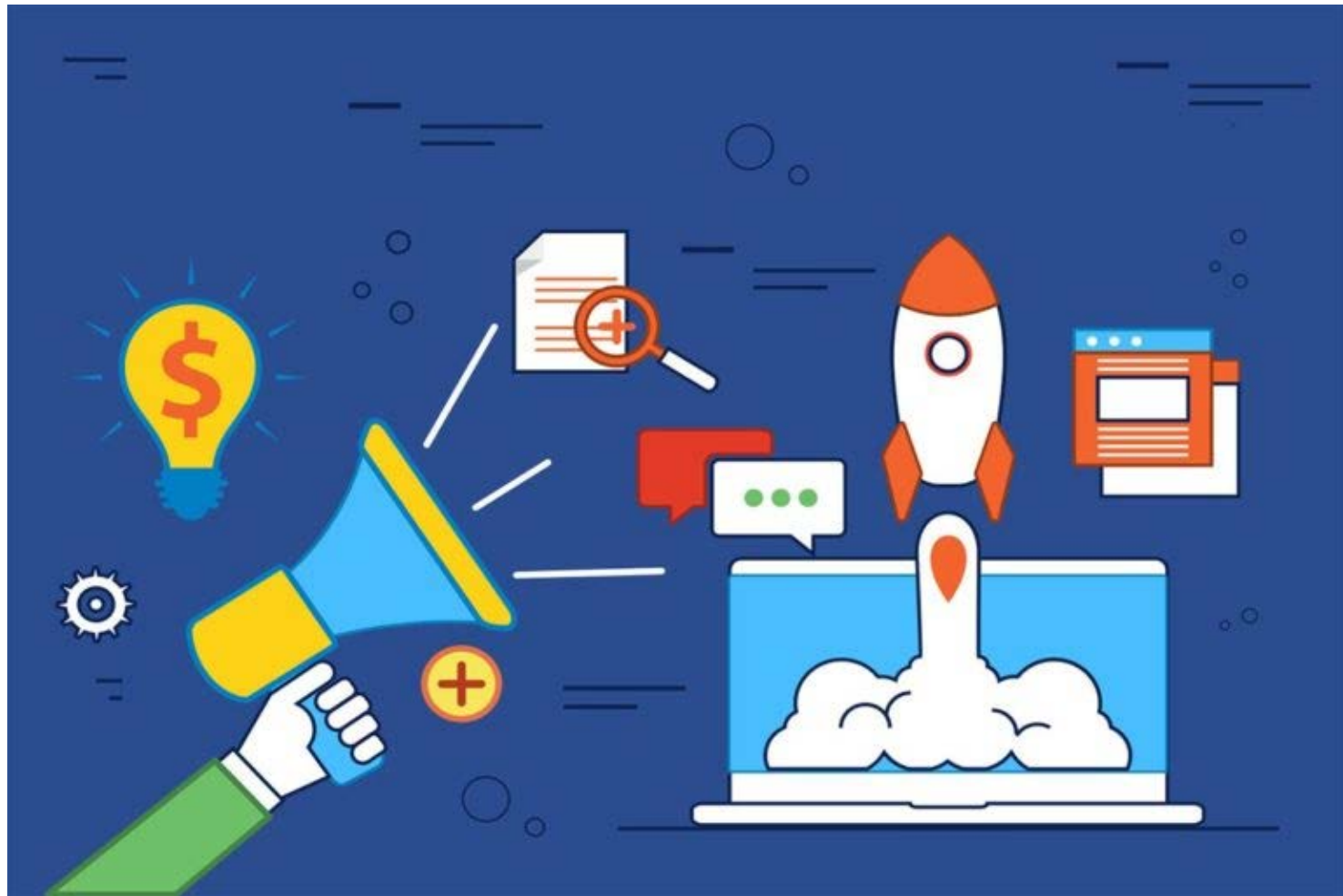
- Develop gift pyramid that reflects the gifts needed.

Gift Range Chart

Goal Amount:

Gift Range	No. Gifts required	No. Prospects required	Subtotal	Cumulative total	Cumulative percentage
100,000.00	1	4	100,000.00	100,000.00	10%
75,000.00	1	4	75,000.00	175,000.00	18%
50,000.00	2	8	100,000.00	275,000.00	28%
38,000.00	3	12	114,000.00	389,000.00	39%
25,000.00	5	20	125,000.00	514,000.00	51%
19,000.00	8	32	152,000.00	666,000.00	67%
13,000.00	10	40	130,000.00	796,000.00	80%
6,300.00	12	48	75,600.00	871,600.00	87%
2,500.00	12	48	30,000.00	901,600.00	90%
Under 2,500.00	78	314	98,400.00	1,000,000.00	100%
Totals	132	528		1,000,000.00	

Kick Off! Ready, Set, Go!



Public Phase



- Major gifts
- General gifts
- Celebration!



Wrap Up / Discussion



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