

Are We Ready for a Capital Campaign?

Key Steps to Assessing Major Campaign Readiness

EDS V Annual Conference
Tuesday, November 8 - 10:15 am

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Evolve Giving Group



Agenda

- Welcome & introductions
- Anatomy of a Capital Campaign
- 8 Campaign Readiness Factors
- Plan to plan
- Next Steps



About Evolve



Women owned & led



*300+ nonprofits
served
(65%+ Jewish nonprofits)*



\$330+ million raised



5,000+ leaders trained

Anatomy of a Capital Campaign



Key Capital Campaign Readiness Factors

#1

**What need will a
campaign address?**

- **Needs Assessment**
- **Campaign Objectives**
- **Campaign Goals**

#2

Is your board ready for a campaign?



Structure



Engagement



Vision

#3

Do you have a healthy fundraising program?

- **Success of annual fundraising campaign**
- **Strength of individual/major gifts program**
- **Communications and reputation**

#4

How many gifts do you need, and do you have the prospects?

Campaign Goal = \$16M					
Amount	# of Gifts	# of prospects	Total at Level	Cumulative Amount	% of Goal
\$2,500,000	1	3	\$2,500,000	\$2,500,000	16%
\$1,000,000	2	6	\$2,000,000	\$4,500,000	28%
\$500,000	5	15	\$2,500,000	\$7,000,000	44%
\$250,000	10	30	\$2,500,000	\$9,500,000	59%
\$180,000	15	45	\$2,700,000	\$12,200,000	76%
\$100,000	18	54	\$1,800,000	\$14,000,000	88%
\$50,000	25	75	\$1,250,000	\$15,250,000	95%
\$25,000	30	90	\$750,000	\$16,000,000	100%
TOTALS	105	315		\$16,000,000	

#5

How will you identify and cultivate top prospects?

Mine your data

Engage your community

Identify core leadership

#6
**Can you identify and
recruit a great campaign
chair?**



A rockstar campaign chair should:

1. Be willing and able to use their own connections
2. Advocate for the school and campaign throughout the community
3. Make a leadership gift
4. Possess the 3 C's: courage, commitment and curiosity

#7

Is your staff ready to execute a campaign effort?



HoS + Executive Director

- Clear direction for the school
- Own relationships with major funders
- Comfortable making asks



Fundraising Staff

- Effective individual giving program
- Operations support
- Solid volunteer-professional relationships

#8

**Do you have the structure
and operations in place to
support a campaign?**

Strategic Plan

Functional Database

Sound Financials

Established Gift
Acceptance Policy

Formalized Donor
Recognition & Stewardship

Create a plan to address key campaign readiness factors



Develop a working “goal” for the campaign



Sketch out your vision and case for support



With the board, identify potential lead prospects



Engage key donors and volunteers in the visioning process



Create a realistic gift pyramid and list of campaign prospects



Keep the board and leadership informed and engaged in the process

Anatomy of a Capital Campaign



Goals of Feasibility

align your mission and vision to meet your fundraising goal



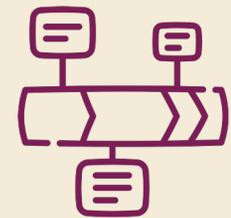
**Test
campaign
messaging**



**Assess \$
capacity of the
community**



**Identify a
lead gift
and cabinet**



**Build a plan
and create
materials**

Now what?

You're ready to launch the campaign



Select
campaign
committee
chair

Define
roles and
responsi-
bilities

Build the
case for
support

Finalize
prospect
list and
assign
solicitors

Train the
committee

Build a
timeline

A group of graduates in blue caps and gowns are standing in a hallway. The image is split into two parts: the left side is a dark blue overlay with white text, and the right side is a clear photograph of the graduates. The graduates are smiling and looking towards the camera. The hallway has a yellow exit sign in the background.

Thank you!

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