



The Capital Campaign Plan: *Road Map to Success*





There are four essential elements to every successful capital campaign:

THE CASE LEADERSHIP PROSPECTS THE PLAN

This article is last in a series addressing each element and will focus on designing a successful capital campaign plan.

You cannot do everything at once, but you can do one thing at a time. Begin by designing a comprehensive campaign strategy that works well with you and your organization.



Every successful campaign begins with a plan. The campaign plan is a detailed set of procedural guidelines for campaign leaders and volunteers. The successful campaign plan is built with two overriding principles in mind: (1) Anything other than a complete success is entirely unacceptable; and (2) To ensure the complete success of this fundraising effort, the campaign must be formally declared (and treated) as the primary institutional priority of the organization throughout the fundraising timetable.

Recognizing and stating these basic truths puts you into the mindset to make the decisions and commitments necessary for a successful campaign. From there, we begin to incorporate essential fundraising elements into a comprehensive strategy.

Just as there are the four essential elements of a successful campaign (Case, Leadership, Prospects and Plan) there are many vital techniques at work within a good fundraising plan, among them the use of: personal visits, a phased

approach, specific gift requests, lead and major gift solicitation, pledge type gifts.

Personal visits always yield more money. People give to people—people they love, people they admire, people they respect and even people they fear. Often it is the personal relationship of the volunteer making the request that has the most sway with the potential donor.

Our classic technique demands that we employ a phase-by-phase approach to our fundraising,

always asking for the largest gifts first, and then medium sized gifts and finally smaller gifts. This ensures that we create enthusiasm and build momentum. Our success, as evidenced by our rapidly rising fundraising totals and our large average gift, will pull undecided people toward us and encourage them to give. Victory has a thousand fathers, yet defeat is always an orphan.

One of the most important concepts we must use is to ask for a specific gift. We should be asking mostly with a view of our need in mind, but with some view of their means in mind as well. As we articulate the request, we want to make it

clear that the reason we are asking them for this specific amount is because we need it if we are to succeed. It is important that they not get the sense that we are asking them for this amount just because we think they have it, or because we think that is what they “ought to give,” but only because “we have this enormous need and a limited number of people of means to whom we can turn.” If people are going to help you

achieve ambitious plans, they need to know what is required of them. You must always ask for the specific gift.

Every campaign that is successful in reaching its potential is going to do a good job of soliciting

Leadership and Major Gifts.

Clearly some families are especially able to help because of their material blessings. Within the fundraising industry, it is a well-known fact that approximately 80% of the money (or more) will come from just 20% of the people (and sometimes fewer).

These Leadership and Major Gifts set the pace for others to follow and they provide the

financial foundation upon which to build a successful campaign. Much time is spent, early in the campaign, trying to determine who should be challenged to consider a gift of this significant nature. A well-run campaign will always stress equal effort, equal stretching or even equal sacrifice from every prospective donor, but not equal giving. Each prospect should be encouraged to do their individual best.

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Another element of a successful campaign plan is to **offer people the opportunity to make pledges, rather than one-time gifts**, and to offer longer pledge redemption periods where appropriate and possible. Depending upon the length of the pledge redemption period, pledges are usually two—three times larger than one-time contributions.

In today's busy world, people often budget their money very carefully. If a family were going to give you \$100 per month, you would rather have that run for 60 months (5 years) than 36 months (3 years), would you not? Narrowing the pledge

collection period is not going to get this family (which is giving out of current income) to pay the money any sooner. It will merely get you a smaller pledge.

There are many other important aspects of a solid fundraising plan, including:



Financial Goals and Objectives

Clearly stated goals tied to both the leaders responsible for attaining them and the timeline over which they are to be accomplished.

A Detailed Campaign Timetable

Giving form to function, the timetable gives us an orderly way to approach a complex task, ensuring the most important things are going to be done first.

Organizational Chart

Clarifying the responsibilities of each campaign leader and showing everyone how they are related to one another.

Description of Leadership Roles and Responsibilities

Written instructions delineating the job responsibilities of each leader/volunteer.

Campaign Phases and/or Divisions and Tracks of Activity

Another form of timeline, breaking out major phases of activity and tracks of action. Many phases may go on simultaneously, while others will be the only activity underway at that given time.

Lead and Major Gift Programs

This most important track of activity begins during the early quiet phase of the campaign and continues until the potential for such gifts has been exhausted.

Commemorative Gift Plan

A comprehensive plan to commemorate the gifts of your campaign donors, especially major and leadership donors which might include naming opportunities, public recognition and memorabilia that you can give to outstanding leaders/donors (such as a scale model of a building, etc.).

Operational Materials

Operating manuals, plans, brochures and booklets

Administrative Policies and Procedures

Established policies and procedures to ensure plans are carried out as designed.

Public Relations and Publicity Plan

Comprehensive program of internal and external public relations.

Identification of Potential Sources of Support

A system of prospect identification, research, evaluation, cultivation.

Solicitation Procedures

The formal procedure for soliciting Leadership and Major Gift Prospects as outlined in the solicitor's guide and elsewhere.

Checklist of Immediate Activities

Ongoing ever-changing list of priorities.

When compiling the plan, test every element to ensure that it is conducive for use with basic fundraising principles. Some principles to measure plan elements against include:

Does this help build momentum?

E.g., Are we planning to solicit large gifts from our best prospects first?

Do our leaders understand the nature of the commitment required (of time, talent, and treasure)?

Will this help us secure our leadership's commitment?

Are we doing this in the best possible manner – both in terms of potential funds raised and volunteer management?

Do we have a comprehensive phased approach with definite time periods? Does each phase of activity build on the success of the previous phase?

Are we remembering the “80/20” rule?

That 80% of the money will come from 20% of the donors?

Are we stressing the importance of pledge gifts?

Does our plan facilitate the receipt of pledge gifts?

Keep in mind that the plan may evolve as the campaign moves forward. Often this is a function of actual early results, and who is giving at what levels. Who is accepting a leadership role? Preparing a detailed timetable and organizational chart is a good way of measuring the progress of the campaign in relation to the plan and detecting when necessary adjustments or revisions may be needed. It also provides a specific measure of accountability.

Establish goals for each constituency and phase. Everyone needs to know what is expected of him or her! A statistical summary of the number and level of gifts required to reach the campaign goal for each phase of activity should be kept regularly. This list should be constantly monitored

against progress to date and should be consulted daily to develop a precise order of solicitation, thus providing us a plan and timetable for asking.

In summary, the campaign plan is one of the four essential elements of a successful capital campaign and must be carefully researched and crafted. Remember to keep a close eye on the fundraising plan and modify it in view of your actual experiences.

The plan is your road map to success. Remember, it is static while the world is very dynamic. Use the plan as your basic guide, maintaining your liberty to deviate from it briefly where called upon, and you will find it serves you quite nicely and leads to your fundraising success.



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