

# **ARE YOU READY FOR A MULTI-MILLION \$\$\$\$ CAPITAL CAMPAIGN?**

I. A CAPITAL CAMPAIGN IS ...

II. A CAPITAL CAMPAIGN DIFFERS FROM AN ANNUAL GIVING  
EFFORT IN THAT IT ...

III. ESSENTIAL TO CAPITAL CAMPAIGN SUCCESS:

A. ORGANIZATIONAL READINESS

B. FEASIBILITY/PLANNING STUDY

C. CAMPAIGN PLAN

D. FOLLOW PROVEN CAMPAIGN PRINCIPLES & STRATEGIES

IV. NONTRADITIONAL STRATEGIES

Compliments of:  
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## **I. CHARACTERISTICS OF A CAPITAL CAMPAIGN ...**

- PROCESS
  
- IDENTIFIES, CULTIVATES, & SOLICITS SELECTED CONSTITUENCIES WITHIN THE ORGANIZATION
  
- ADHERES TO A STRICT ORDER OF SEQUENCE
  
- MAY NOT BE THE VEHICLE THAT INITIATES BIG GIFTS -- BUT A MEANS TO ACOLLECT ON GOOD- WILL ESTABLISHED OVER A PERIOD OF TIME
  
- MAY NOT KNOW THE EXTENT OF THEIR INTERESTS OR EVEN THEIR IDENTITIES.

### **THE TASK OF CAMPAIGN PREPARATION:**

- DETERMINE WHO THESE PEOPLE ARE
  
- EDUCATE AND CULTIVATE THEM
  
- BRING IN THE HARVEST BY ASKING FOR BIG GIFTS

## **II. CAPITAL VS. ANNUAL GIVING TO OPERATING FUND**

A. SENSE OF URGENCY

B. DOLLARS VS. DONORS

C. BIG GIFTS

D. DOLLARS VS. CALENDAR

E. LEADERSHIP

F. MULTI-YEAR PLEDGES

G. PERSONAL SOLICITATION

H. MULTIPLE VISITS

### III. ESSENTIAL TO CAPITAL CAMPAIGN SUCCESS

#### A. ORGANIZATIONAL READINESS

##### 1. MISSION & VISION STATEMENTS

##### 2. CORPORATE/LONG RANGE PLAN IDENTIFIES:

- GOALS SET TO ACHIEVE MISSION
  
- PROGRAMS OFFERED TO MEET GOALS
  
- STAFFING REQUIRED
  
- VOLUNTEERS REQUIRED
  
- FACILITY & EQUIPMENT NEEDS
  
- FINANCIAL NEEDS
  
- ANNUAL TARGETS & MEASUREMENT PROCESS

### III. ESSENTIAL TO CAPITAL CAMPAIGN SUCCESS

#### A. ORGANIZATIONAL READINESS (con=t):

#### 3. IDENTIFY MAJOR CAPITAL NEEDS TO ACHIEVE YOUR PLAN FOR THE NEXT FIVE YEARS:

<u>ITEM</u>	<u>COST</u>
1. NEW FACILITIES (@ \$120. sq.ft.)	\$ _____
2. REMODELING EXISTING	\$ _____
3. ARCHITECTURAL, CAMPAIGN COSTS, MISC., etc. (20% of above)	\$ _____
4. LAND ACQUISITION	\$ _____
5. EQUIPMENT (10% of NEW FACILITIES)	\$ _____
6. OTHER	\$ _____
 TOTAL FINANCIAL NEEDS TO ACHIEVE PLAN	 \$ _____

### III. ESSENTIAL TO CAPITAL CAMPAIGN SUCCESS

#### A. ORGANIZATIONAL READINESS (con=t):

##### 4. FUNDING SOURCES OVER NEXT FIVE YEARS:

<u>SOURCE</u>	<u>AMOUNT</u>
1. OPERATING SURPLUS	\$ _____
2. RESERVES	\$ _____
3. SPECIAL EVENTS	\$ _____
4. SALE OF ASSETS	\$ _____
5. CAPITAL GIFT SUPPORT	\$ _____
6. OTHER	\$ _____
 TOTAL:	 \$ _____

### III. ESSENTIAL TO CAPITAL CAMPAIGN SUCCESS

#### A. ORGANIZATIONAL READINESS (cont):

##### 5. CRITERIA TO DETERMINE CAPITAL READINESS:

1. WRITTEN 3 - 5 YEAR PLAN \_\_\_\_\_
2. PROJECT ENTHUSIASTICALLY  
SUPPORTED BY THE BOARD \_\_\_\_\_
3. HIGH QUALITY & HIGH VOLUME PROGRAM \_\_\_\_\_
4. BALANCED BUDGET LAST 3 YEARS \_\_\_\_\_
5. ANNUAL GIVING GROWING AT 10% RATE \_\_\_\_\_
6. IDENTIFIED PROSPECTS. ONE WHO MIGHT  
GIVE 10-15% OF PROJECTED GOAL \_\_\_\_\_

### **III. ESSENTIAL TO CAPITAL CAMPAIGN SUCCESS**

#### **A. ORGANIZATIONAL READINESS**

#### **B. FEASIBILITY/PLANNING STUDY**

- \* PROCESS**

- \* Feasibility Planning Study Team**

- \* SUMMARY OF PROJECT TO BE TESTED**

- \* ANSWERS THE FOLLOWING QUESTIONS:**

- HOW STRONG IS CASE PERCEIVED TO BE?**

- WHAT IS OUR IMAGE?**

- WHAT SHOULD OUR FUNDRAISING GOALS BE?**

- HOW STRONG IS OUR VOLUNTEER LEADERSHIP PERCEIVED TO BE?**

- WHO ARE POTENTIAL CAMPAIGN LEADERS and VOLUNTEERS?**

- WHAT IS THE POTENTIAL FOR PLANNED GIFTS?**

### **III. ESSENTIAL TO CAPITAL CAMPAIGN SUCCESS**

#### **A. ORGANIZATIONAL READINESS**

#### **B. FEASIBILITY/PLANNING STUDY**

#### **C. CAMPAIGN PLANNING**

1. GIFT RANGE CHART
2. NON-SOLICITATION TASK FORCES
  - a. CASE FOR SUPPORT
  - b. COMMUNICATIONS/AWARENESS
  - c. PROSPECT IDENTIFICATION & EVALUATION
3. SOLICITATION DIVISIONS
  - a. SEQUENTIAL SOLICITATION/TIMETABLE
  - b. OFFICIAL FAMILY
  - c. NUCLEUS/PATTERN/LEADERSHIP GIFTS
  - d. MAJOR GIFTS
  - e. SPECIAL GIFTS
  - f. GENERAL GIFTS DIVISION
  - g. DIRECT MAIL -- CLEANUP
4. TIMETABLE

## PRO FORMA GIFT RANGE CHART

**GOAL = \$1,500,000**

GIFT RANGE	NO. GIFTS NEEDED	TOTAL IN RANGE	CUMLATIVE TOTAL
\$ 200,000 +	1	\$200,000	\$ 200,000
100,000-199,000	2	225,000	425,000
50,000 - 99,000	4	200,000	625,000
25,000 - 49,000	8	225,000	850,000
10,000 - 24,900	20	230,000	1,080,000
5,000 - 9,000	35	190,000	1,270,000
1,000 - 4,900	75	120,000	1,390,000
under \$ 1000	Many	110,000	1,500,000

**GOAL = \$1,000,000**

\$ 100,000 +	1	100,000	100,000
75,000 - 99,900	2	155,000	255,000
50,000 - 74,900	2	110,000	365,000
25,000 - 49,900	5	130,000	495,000
10,000 - 24,900	12	160,000	655,000
5,000 - 9,900	27	155,000	810,000
1,000 - 4,900	60	125,000	935,000
under \$ 1,000	Many	65,000	1,000,000

### **III. ESSENTIAL TO CAPITAL CAMPAIGN SUCCESS**

**A. ORGANIZATIONAL READINESS**

**B. FEASIBILITY/PLANNING STUDY**

**C. CAMPAIGN PLANNING**

**D. FOLLOW PROVEN CAMPAIGN PRINCIPLES and STRATEGIES**

### **IV. NONTRADITIONAL STRATEGIES MUST BE**

**DEVELOPED TO COPE WITH:**

A. OPEN CHAIR POSITIONS

B. LATE LEAD GIFTS

C. VOLUNTEERS WHO PREFER NOT TO SOLICIT

IN SOME CASES:

\* PROFESSIONAL DEVELOPMENT DIRECTOR  
HANDLES MORE OF THE VOLUNTEERS WORK

\* CAPITAL CAMPAIGNS UNDERTAKEN TO  
IDENTIFY & BUILD VOLUNTEER LEADERSHIP

IN MANY CASES:

ENDOWMENT IS INCLUDED IN THE GOAL AND  
PLANNED GIFTS ARE COUNTED TOWARD GOAL!