


Capital Campaigns

Crissy Zitka, CFRE and Tammy Rocker, CFRE



NATIONAL
HEALTH CARE
for the
HOMELESS
COUNCIL



Capital Campaign

What is it?

A capital campaign is a **targeted effort** to raise a **specified amount of money** in a **limited period** for **specific purpose(s)** in a **controlled manner**.

Capital Campaign

What is it?

A capital campaign is a **targeted effort** to raise a **specified amount of money** in a **limited period** for **specific purpose(s)** in a **controlled manner**.






Capital Campaign

What it's Not

A regular affair – get rich quick scheme – major gifts effort – program or agency replacement funding

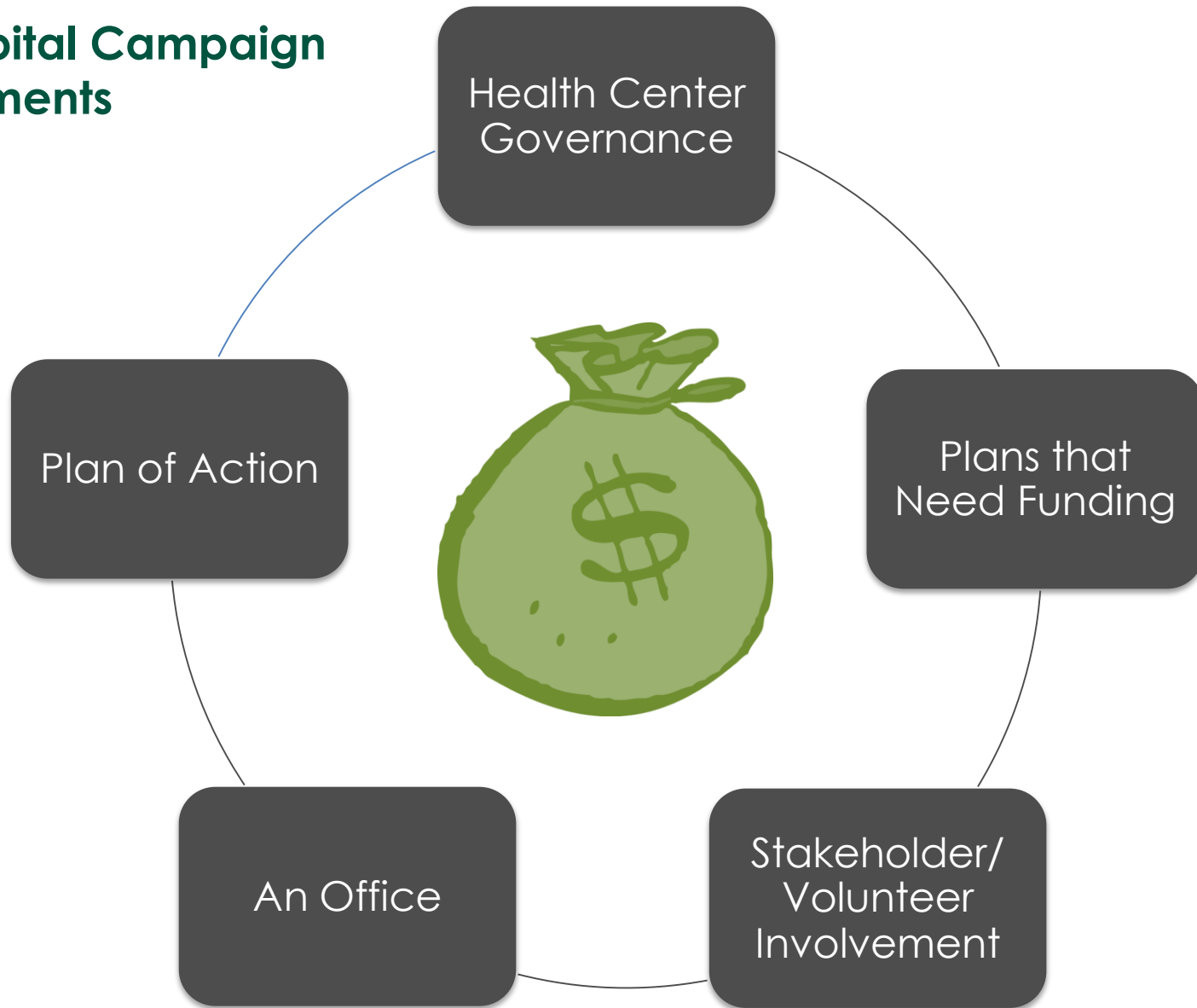


Capital Campaign

What it's Not



Capital Campaign Elements



Elements Described

- **Health Center Governance**
 - Board of Directors + Leadership Staff
 - Authorizing Boards/Bodies/Authorize staff support
- **Plans that Need Funding**
 - One or Several *big* Needs – in concept form
 - Dollar Amounts estimated per Item
- **Stakeholder/Volunteer Involvement**
 - Key Community Leaders – Donors and Would Be
 - Mix of Stakeholders: Those Involved and Unaware

Elements Described

- **Stakeholders/Volunteers (cont.)**
 - Board of Directors – Former Board/Donors
 - Health Center Volunteers, CAB, former Staff
- **An Office**
 - Internal Resources and Tools (computer/supplies)
 - Staff Support to maintain Campaign materials
- **Judicious Plan of Action**
 - Meticulous Process (think quality tools)
 - Timeline that Makes Sense



Capital Campaigns

Nuts & Bolts



Capital Campaigns

Nuts & Bolts

What Happens ?

- Issue an RFP
- Hire a Consultant
- Conduct Feasibility Study
- Conduct Campaign
- Celebrate Success

What is a Feasibility Study?

A series of structured interviews with key community stakeholders, both involved and not, donors and would be donors, that will inform your degree of success by their collective response –

see also [Findings Report](#)

Capital Campaigns

What is Required?





Capital Campaigns

The Role of Development Staff



The Role of Development Staff

#	Steps	Volunteers	Staff
1.	Identify Prospect	X	X
2.	Rate Prospect	X	X
3.	Create Donor Profile		X
4.	Identify the Call Team	X	X
5.	Book the Call	X	X
6.	Prepare Briefing Notes		X
7.	Finalize Strategy	X	X
8.	Make Cultivation Call	X	X
9.	Prepare Call Report	X	X
10.	Strategize re: Proposal Development	X	X
11.	Prepare Customized Proposal		X
12.	Book Solicitation Call to Close Gift		X
13.	Make Solicitation Call to Close Gift	X	X
14.	Follow-up Donor Relations		X
15.	Negotiate Donor Recognition		X
16.	Prepare Media Announcement (where applicable)		X
17.	Develop Stewardship Plan		X
18.	Engage in Ongoing Communications with Donor	X	X
19.	(Potentially) Re-solicit in the Future	X	X

The Role of Development Staff

Preparation Activities:

- Donor solicitation plan
- Donor research
- Case for support

Gift chart

Gift Range	No. Gifts required	No. Prospects required	Subtotal	Cumulative total	Cumulative percentage
5,000.00	1	4	5,000.00	5,000.00	10%
3,800.00	1	4	3,800.00	8,800.00	18%
2,500.00	2	8	5,000.00	13,800.00	28%
1,800.00	3	12	5,400.00	19,200.00	38%
1,400.00	3	12	4,200.00	23,400.00	47%
1,200.00	5	20	6,000.00	29,400.00	59%
1,000.00	7	28	7,000.00	36,400.00	73%
750.00	7	28	5,250.00	41,650.00	83%
500.00	10	40	5,000.00	46,650.00	93%
Under 500.00	13	53	3,350.00	50,000.00	100%
Totals	52	208		50,000.00	

The Role of Development Staff

Planning for the Donor Meeting:

- Identify your Ask team.
- Script the meeting.
- Who does the ask? For how much?
- Review approach with volunteers.
- Rehearse, rehearse, rehearse

The Role of Development Staff

The Donor Meeting:

- Emphasize vision, people and programs
- Watch body language, listen for clues
- Offer gift options if necessary
- Have a written proposal to leave
- End on a positive note

Making the Ask



The Role of Development Staff

Making the Ask:

- Script your ask and prepare
(The more practice you have the easier it is)
- Be clear on the amount you are asking for.
- Ask is for an organizational priority
- Ask is made in an ethical, professional manner
- Top level gifts require a leadership ask.

You make the Ask and then

Shushhhh!

The Close

- Restate their commitment
- Formalize follow up
- Provide them with a personalized written proposal
- Thank them!

The Role of President or CEO

Fun Fact: Very few major gifts are ever given to an organization without the direct involvement and presence of the CEO.

When to Call in the Boss

- CEO has a unique personal connection with the donor
- Donor is the CEO of another organization or business
- Donor is a top-echelon community leader (e.g., senator, town founder)
- Donor will be solicited for particularly large gift

**“The Ask is 25% of your time –
the follow-up is 75%”**

Laura Fredricks



Capital Campaign

Timelines



Capital Campaigns

Feasibility
Study
3-6 mo's



Planning
3-6 months



Quiet Phase

12 – 30 months



Public Phase

6-9 mo's

Predictors for Success



1. Bold leadership and Volunteers
2. Moving Case for Support
3. Dedicated Major Donors
4. Staffed Campaign Office
5. Solid Campaign Plan



Capital Campaigns

Q & A

