

# TYPICAL CAPITAL CAMPAIGN MODEL

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Gifts are most often solicited from a wide variety of community constituents and sponsors, including corporations, foundations, local businesses, service clubs, volunteers and individuals. Support from all levels of government should also be sought. Multi-year giving (usually 3–5 years) options should be made available along with a selection of attractive dedication and sponsorship opportunities at various levels.

Campaigns unfold in four phases:

1. Feasibility Study (3-4 Months)
2. Campaign Preparations (3-6 Months)
3. Leadership & Major Gifts (6-12 Months)
4. Community (Public) Gifts (6-12 Months)

## **PHASE 1: FEASIBILITY STUDY**

Feasibility Studies, the first step in preparing for a major capital campaign, provide an opportunity to market test several important components of a capital campaign and to determine organizational readiness and community receptivity for a major funding venture. Each feasibility study should:

- Market test the communities awareness of and perceptions of the organization, in particular its image and reputation;
- Present the particular project(s) that is proposed for the campaign and assess community receptivity (Preliminary Statement of Need);
- Determine the availability of community leadership for such a campaign;
- Identify sources of potential funds and likely giving levels;
- Advise on the best timing for such a campaign keeping in mind competing campaigns and general economic conditions;
- Assess organization readiness of its staff and volunteers to conduct a major campaign; and
- Ultimately, recommend whether or not a campaign is viable.

## **PHASE 2: CAMPAIGN PREPARATIONS**

During the **Campaign Preparations** phase, all documents and activities will be devised to lay the groundwork for campaign success. Critical activities in this phase are:

- Selection of Campaign Chair
- Selection of Campaign Cabinet (leadership team)
- Finalizing Case for Support
- Development and printing of all communication materials (brochure, letterhead, pledge forms, power point)
- All administration preparations – staff & volunteers roles
- Preparation of required policies



- Donor recognition
- Naming opportunities
- Sponsorship practices/contracts
- Develop campaign strategic plan
- Orientation & training of campaign leadership team (Campaign Cabinet, Board of Directors)
- Key prospect research (Lead Gifts)
- Grant research – corporations, foundations, service clubs
- Develop solicitation materials template (grant template/ MG proposals etc.)

### **PHASE 3: LEADERSHIP & MAJOR GIFTS**

The **Leadership & Major Gifts** phase will include activities to identify, cultivate and solicit the key leadership gift prospects of \$10,000 and more. This will be accomplished through research, awareness and key visits to set the stage for major giving and sponsorship support. Activity will be led by volunteers with strong staff support.

- Solicitation of Lead Gifts
- Major Gift research
- Initiate grant applications & service club presentations (ongoing)

### **PHASE 4: COMMUNITY/PUBLIC GIFTS**

During the **Public Component** phase, campaign awareness will be at its height to ensure that the entire community is apprised of success achieved to date, and that campaign momentum is maximized to encourage campaign participation and see the program through to a successful conclusion. Solicitation will be aimed at the community-at-large.

- Solicitation of Special Gifts (\$1,000 +)
- Public Launch (once 50 – 60 % of goal realized)
- Special Events
- Appeals to all donors not already approached
- Closure to all personal solicitations
- Final celebration

**\*\*Some Campaign Phases do overlap.** Campaigns generally take between 24-36 months; however, a number of factors can influence the process resulting in either a shorter or longer campaign. A more definitive schedule will be established once the feasibility study is complete.

Costs for capital campaigns vary by project and are strategy dependant. As a general rule, an organization should expect to budget between 9-13% of gross revenues for a campaign goal of \$1-3M. Many expenses are static in nature and therefore as campaign goals increase, the relative percentage of costs will decline.