A Capital Campaign: Funding the Vision

Presented by Kathy Alm, CEO, PATH, Intl.
What is a Capital Campaign?
Vision of the Future
With any campaign you’re going to feel like this:
Campaign Readiness

Examine and Assess

- Organizational Leadership
- Previous Fundraising Success
- Current Donor Pool
- Organization’s reputation
- Finance Support
- Administrative Support
“What do you think of my idea?”
Consultants

Pros and Cons
If all of your ducks are in a row...
Thoughtful Planning
Achieving Your Vision

Project Development
- Mission
- Community needs
- Strategic priorities

Case for Philanthropy
- Why philanthropy?
- Societal benefits
- Organizational competence
- Problem / solution

Project concept
- Preliminary budget
- Board approval

Strategic Planning
- Mission
- Community needs
- Strategic priorities

Project Development
- Mission
- Community needs
- Strategic priorities

Campaign Planning Study
- Image of the organization
- Appeal of the project
- Financial support
- Volunteer leadership
- Climate and timing
- Internal readiness
- Timeframe: 4-5 months
- Outcome: goal, roadmap

Campaign Planning and Lead Gifts Phase
- Solidify project scope and goal
- Refine internal systems/staffing
- Establish top level volunteer leadership

Campaign Major Gifts Phase
- Expand volunteer leadership
- Secure major gifts
- Secure employee gifts
- Engage special constituencies
- Timeframe: 12-24 months
- Outcome: 70-85% of goal

Campaign Planning and Lead Gifts Phase
- Finalize case statement
- Train staff, Board and campaign leaders
- Create tailored major gift materials
- Secure lead gifts

Campaign Major Gifts Phase
- Publicly announce campaign
- Hold kickoff event(s)
- Conclude pending solicitations
- Make presentations to community groups
- Conduct organization and community appeal(s)
- Hold celebration event(s)
- Timeframe: 6-12 months
- Transition to Annual Giving

Campaign Public Phase
- Secure Board and campaign leadership gifts
- Timeframe: 9-15 months
- Outcome: 30-50% of goal

Vision Realized
- Transition to Annual Giving
Budget
Making the Case

- Reason
- Background Information
- Final Case Statement

http://www.cdsfunds.com/the_case_statement_one_of_the_four_elements_of_a_campaign.html
Leadership

“The task of the leader is to get his people from where they are...”

“...to where they have not been.”
- Henry Kissinger
Prospects

Looking For Prospects?
<table>
<thead>
<tr>
<th>Number of Prospects Needed</th>
<th>Number of Gifts Needed</th>
<th>Gift Range</th>
<th>Total</th>
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<tr>
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<tr>
<td>Total Gifts</td>
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<td></td>
<td>$5,500,000</td>
</tr>
</tbody>
</table>
Timeline
Phase I

Shhh... We’re planning something fabulous!
Going Public
Contingency Plan
Straight Ahead
Celebrate!
Take a Sabbatical!