



IUPUI THE FUND RAISING SCHOOL

LILLY FAMILY SCHOOL OF PHILANTHROPY

Managing the Capital Campaign

COURSE AGENDA

DAY ONE

8:30 **Introductions**

9:00 **Course Overview**

9:30 **Development Overview**
Definition of Capital Campaign
Developing a Donor
4-Legged Stool
Sources of Gifts

10:15 *Break*

10:30 **Campaign Readiness**
Types of Campaigns
Campaign Best Practices
Campaign Assessment
Link to Strategic Plan

11:15 **Campaign Planning, Phase I**
Overview
Campaign Objectives
Selling Dollar Goals

12:00 **Lunch**

1:00 **Campaign Planning, Phase I, continued**
Case for Support
Gift Range Charts

2:45 *Break*

3:00 **Southwest Community Center**
Campaign Objectives
Campaign Theme
Campaign Goals

5:00 **Adjourn**



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DAY TWO

- 8:30** **Gift Range Charts Review**
- 9:00** **Campaign Planning Study**
Consultant Report
Southwest Community Center Work Session 2
- 9:30** **Campaign Consultants**
- 10:00** *Break*
- 10:15** **Campaign Planning, Phase II**
Staffing
Policies
Budget
Communications
- 12:00** **Lunch**
- 1:15** **Campaign Planning, Phase II, continued**
Donor Recognition
Naming Opportunities
Campaign Structure
Campaign Timetable
- 2:45** *Break*
- 3:00** **Building the Nucleus Fund**
Prospect Management
Ratings Matrix
- 3:30** **Lead Gift Solicitation**
Prospect Research
The Art of Questioning
Strategic Gifts
- 5:00** **Adjourn**



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DAY THREE

- 8:30** **Prospect Solicitation Review**
4 Parts of Solicitation
Handling Objections
Solicitation Materials
- 9:00** **Solicitation Exercise**
- 10:30** *Break*
- 10:45** **The Public Phase**
Touch Point Strategies
Capital Campaign Self-Test
Volunteers
- 12:00** **Lunch**
- 1:15** **Other Campaign Considerations**
Financial Modeling
Business Planning
- 2:30** *Break*
- 2:45** **Campaign Completion**
Post Assessment Process
Follow Through
- 3:15** **Capital Campaign Action Plan**
Priorities
Q&A
- 4:00** **Graduation**
- 5:00** **Adjourn**