Managing the Capital Campaign

Avoid common mistakes . . . run campaigns with confidence!

You'll Learn How To

- Determine your organization's readiness for capital fundraising
- Plan a capital campaign from preparation to celebration
- Develop and use gift range charts as planning, involvement, and evaluation tools
- Enlist and motivate the right volunteer leadership for your capital campaign
- Conduct prospect research that helps to determine gift capacity
- Integrate capital fundraising in your development program.

You'll Also Learn

- The role of capital fundraising in your development program
- Current trends in fundraising
- Effective use of a consultant.

What You'll Receive

- An easy-to-use, comprehensive Study Guide for future reference
- "Best practices" advice on capital campaigns
- A checklist for gauging internal readiness for capital fundraising
- Marketing tools to assess campaign feasibility
- Exercises in goal setting
- Tips for involving volunteers

Class Schedule

Day 1  8:30 a.m. - 5:00 p.m.
Day 2  8:30 a.m. - 5:00 p.m.
Day 3  8:30 a.m. - 5:00 p.m.
Managing the Capital Campaign - Day 1

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

Assignment: Construct one Gift Range Chart for the campaign for your home organization OR $500,000 to start a private pre-school for 30 children.
Managing the Capital Campaign - Day 2

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 2
Staffing
Policies
Budget
Communications

11:45 Lunch

1:00 Campaign Planning, Phase 2, continued
Donor Recognition
Naming Opportunities
Campaign Structure
Campaign Timetable

2:30 Break

2:45 Building the Nucleus Fund
Prospect Management
Ratings Matrix

3:15 Lead Gift Solicitation
Prospect Research
The Art of Questioning
Strategic Gifts

5:00 Adjourn

Homework: Select one lead gift prospect from your organization. Complete the Prospect Research Form capturing the information you know about this prospect.
### Managing the Capital Campaign - Day 3

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<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tr>
<td>8:30</td>
<td><strong>Prospect Solicitation Review</strong></td>
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<td>4 Parts of Solicitation</td>
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<td>Handling Objections</td>
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<td>Solicitation Materials</td>
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<td>9:00</td>
<td><strong>Solicitation Exercise</strong></td>
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<td>10:30</td>
<td>Break</td>
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<td>10:45</td>
<td><strong>The Public Phase</strong></td>
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<td>Touch Point Strategies</td>
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<td>Capital Campaign Self-Test</td>
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<td>Volunteers</td>
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<td>12:00</td>
<td>Lunch</td>
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<td>1:15</td>
<td><strong>Other Campaign Considerations</strong></td>
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<td>Financial Modeling</td>
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<td>Business Planning</td>
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<td>2:30</td>
<td>Break</td>
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<td><strong>Campaign Completion</strong></td>
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<td>Post Assessment Process</td>
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<td>Follow Through</td>
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<td><strong>Capital Campaign Action Plan</strong></td>
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<td>Q&amp;A</td>
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<td>4:00</td>
<td><strong>Graduation</strong></td>
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<td>5:00</td>
<td><strong>Adjourn</strong></td>
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