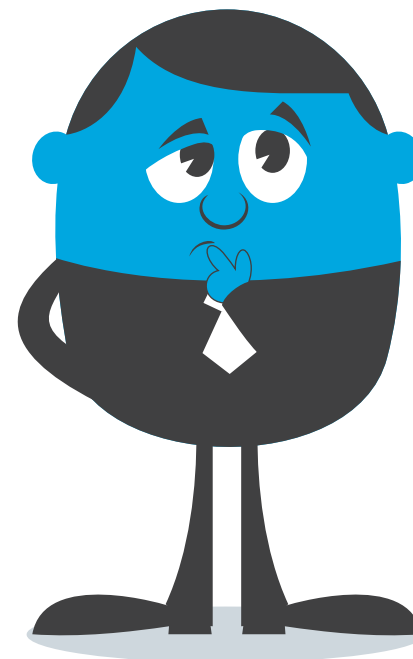


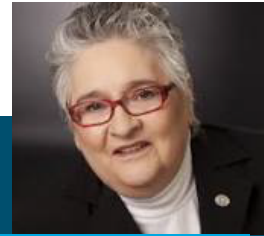
ARE YOU READY FOR A CAPITAL CAMPAIGN?

Evaluate your readiness to conduct a sensational campaign



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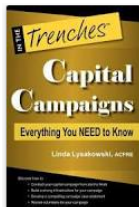
LINDA LYSAKOWSKI, ACFRE

Linda Lysakowski is one of slightly more than 100 professionals worldwide to hold the Advanced Certified Fundraising Executive designation. In her nearly twenty-five years as a philanthropic consultant, Linda has managed capital campaigns, helped hundreds of nonprofit organizations achieve their development goals, and trained more than 37,000 development professionals in Canada, Mexico, Egypt, Bermuda, and most of the fifty United States.

A graduate of Alvernia University and AFP's Faculty Training Academy, she is a Master Teacher. Linda is the author of Recruiting and Training Fundraising Volunteers; The Development Plan; Fundraising as a Career: What, Are You Crazy?; Capital Campaigns: Everything You NEED to Know; Are You Ready for a Capital Campaign? Workbook, Raise More Money from Your Business Community; Raise More Money from Your Business Community This Year workbook, Fundraising for the GENIUS 1st and 2nd editions, a contributing author to The Fundraising Feasibility Study—It's Not About the Money and YOU and Your Nonprofit Board, co-editor of YOU and Your Nonprofit and The Nonprofit Consulting Handbook; and co-author of The Essential Nonprofit Fundraising Handbook, Nonprofit Strategic Planning, The New Donor, and The Leaky Bucket: What's Wrong With Your Fundraising...And How You Can Fix It.

In addition to her consulting and training practice, Linda serves as Acquisitions Editor and Marketing Editor for CharityChannel Press and For the GENIUS Press.

You can access the webinar recording for the findings in this eBook by [clicking here](#). You can also shop for [Linda's books](#) on Google.






OVERVIEW

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FIRST THINGS FIRST WHAT IS A CAPITAL CAMPAIGN?

It's a significant fundraising effort (usually) designed to fund major institutional needs such as:

- ✓ Building(s) 
- ✓ An endowment 
- ✓ Program(s) 

ARE YOU READY?

Capital Campaigns are exciting but are you ready? This eBook will help you:
(1) Determine if you are ready for a campaign and (2) Help you get ready for a campaign.

THE BENEFITS OF A CAPITAL CAMPAIGN

- ✓ Efficiently raises funds for narrowly defined needs
- ✓ Involves a deadline which inspires action
- ✓ Brings staff, volunteers, board members, donors, members, advocates, communities, and other supporters together in a meaningful way
- ✓ Places emphasis on major gifts including planned gifts
- ✓ Builds awareness for the cause in general
- ✓ Brings forth a high degree of financial accountability to donors
- ✓ Positively affects long-term fundraising efforts thanks to enhanced new donor acquisition
- ✓ Enhances fundraising skills among staff and other constituents
- ✓ Forces the organization to think strategically, develop a solid plan, improve its solid plan, streamline its communications, and improve its marketing

WHAT IS INVOLVED IN A CAPITAL CAMPAIGN?

Here's the recipe!

- 1) Persuasive campaign literature
- 2) Application of proven procedures
- 3) Careful scheduling
- 4) Publicity
- 5) A specified time period
- 6) A prescribed budget
- 7) Long-range planning

8) Sound research

Organizational readiness and effectiveness

- Leadership
- Staff
- Volunteers/Board members
- Campaign chair
- Access to resources

Donor readiness

Environmental appraisal

- Donor pool
- Organization reputation
- Peer organization efforts
- Sector economics

Assessment of the costs

- Building or project costs
- Fundraising costs

NOTE:

People don't give to construct a building. They give to the people who will be served in that building.

THE ELEMENTS OF A STRONG CAPITAL CAMPAIGN FOUNDATION

A solid foundation includes:

- High ethical standards
- Donor management software
- History of annual giving
- Gift acceptance policies
- Engaged and supportive staff
- Proper approval from state or other regulatory authorities
- Board commitment
- Strong case/need
- Pool of prospective donors and effective volunteers

YOU'LL NEED TWO PLANS AND ONE PLANNING STUDY

PRE-CAMPAIGN PLAN

Usually involves a steering committee that decides whether to conduct a planning study or not

- Tests and validates the needs to justify consideration of a campaign effort
- Considers a preliminary building or project plan and budget
- Evaluates internal readiness

PLANNING STUDY

This is also known as a feasibility study

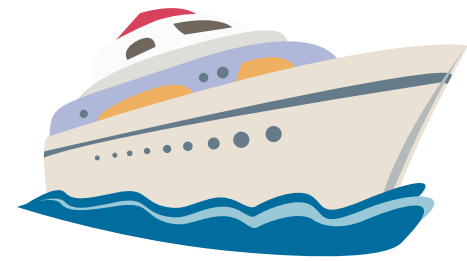
- Helps create a blueprint for a successful campaign effort
- Pre-sells the campaign while it inspires and attracts key leadership and potential donor involvement
- Often tests the case for support
- Assesses donor capacity and interest
- Evaluates internal readiness
- Determines likelihood of goal being met
- Recommends a schedule
- Investigates potential campaign leaders

CAMPAIGN PLAN

More focused on tactics than strategies

- Role assignments for everyone involved
- Roll out phases
- Marketing plans
- Engagement and solicitation plans
- Financial plans
- Stewardship and recognition plans

IS YOUR BOARD ONBOARD?



BOARD CHECKLIST:

- Do they have the capability to give at a meaningful level?
- Do they have access to people with capacity?
- Do they have influence in the community?
- Can they help promote the campaign?
- Are they willing to help?

SHOULD YOU HIRE HELP?



Here are reasons you might want to hire a consultant:

- Large amounts of money are at stake; this might be the largest amount of money your organization will ever raise.
- Time is of the essence; you'll need someone to keep things on-track
- Failure is not an option; you won't want egg on your organization's face.
- This is not a time to "wing it" or experiment

IMPORTANT!

Consultants will not raise money for you. They will help you and your volunteer solicitors raise it.

HOW CONSULTANTS CAN HELP YOU



Here's what consultants will do:

1. Conduct development audit to evaluate internal readiness
2. Conduct feasibility study to evaluate external readiness
3. Help you strategize, plan, and organize your efforts
4. Write a case for support
5. Screen donors and build caseloads (hopefully with MarketSmart technologies)
6. Train volunteers and board members
7. Assist with the management of communications channels

WHY YOU NEED VOLUNTEERS



Your campaign will be exponentially more likely to succeed if you have amazing volunteers!

Volunteers will:

- Take part in a “Campaign Cabinet” that includes one chair from each volunteer committee.

Here are some committees you may need:

- Leadership committee
- Major gift committee
- Small business committee
- Event / Kick-off committee
- Recognition / Dedication / Groundbreaking committee
- Public relations / Promotion committee
- Finance committee
- Building committee

- Guide the campaign and the project

- Identify prospective donors

- Cultivate prospective donors

- Identify other volunteers

- Give money in addition to their time

- Ask for money

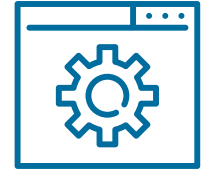
IS YOUR STAFF SPREAD TOO THIN?

Capital campaigns require a lot of time and effort. Can your staff:

- Coordinate all the meetings and events?
- Prepare all the reports?
- Support the volunteers?
- Prepare and disseminate the internal and external communications?

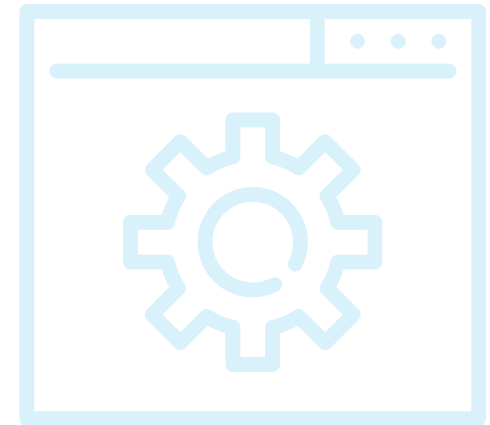


IS YOUR DONOR MANAGEMENT SOFTWARE ABLE TO SUPPORT THE CAMPAIGN?



Does it include the following?:

- A coding structure for campaign divisions and various solicitors
- Mail merge features for personalized appeals
- Reminder functionality to prompt multi-year pledges
- Acknowledgement capabilities
- Reporting tools for cash flow projections and solicitor notes, updates, and evaluations
- Synchronization with [MarketSmarts' donor survey platform](#) and donor tracking technologies



ARE YOUR GIFT ACCEPTANCE POLICIES ACCEPTABLE?



Gift acceptance policies help manage the expectations of donors and also serve to guide board and staff who are doing the asking and receiving.

- What gifts will you accept?
- What gifts run counter to the organization's values and why?
- Is the organization equipped to dispose of or manage certain gifts (such as real estate)?
- How will you use the gifts? By when?
- How will supporters be recognized?
- How will an investment portfolio be managed?

CAPITAL CAMPAIGN READINESS QUESTIONNAIRE

Evaluation Instructions:

Circle a number from 0 to 5 for each statement (0 = serious problem exists; 5 = goal completed)

Use the questions below each statement to aid in determining the appropriate rating for that statement.

1. Organization has met all legal requirements to engage in fundraising activities.

0 1 2 3 4 5

- *Does the organization have IRS ruling as 501(c) 3 or other charitable designation?*
- *Is the organization registered with the state's regulatory authority, if required?*
- *Has it met requirements of or have approval from United Way, local capital campaign review board, its national office, or other funding or regulatory agencies?*

CAPITAL CAMPAIGN READINESS QUESTIONNAIRE

2. Organization has a solid infrastructure.

0 1 2 3 4 5

- *Does the organization have appropriate staff in place?*
- *Does the organization have written mission/vision statements?*
- *Are gift acceptance policies in place?*
- *Are data entry procedures in place?*
- *Does the organization have an adequate and up-to-date donor software system?*

3. Organization is financially stable.

0 1 2 3 4 5

- *Does the organization have a qualified, experienced financial officer on your staff?*
- *Does the board's financial committee understand the organization's fiscal status?*
- *Have revenues increased or deficits decreased in the past two years?*
- *Has the organization had a balanced budget for at least two years?*
- *Does the organization have a line of credit or availability of a bridge loan during construction?*

CAPITAL CAMPAIGN READINESS QUESTIONNAIRE

4. The board president is recognized as a strong, able community leader.

0 1 2 3 4 5

- *Has the president been on the board of directors at least two years?*
- *Has the president been on the board less than six years?*
- *Is the person known and respected in the community?*
- *Does the person show good judgment?*
- *Has the president made a leadership gift?*

5. The board of directors has at least seven members who have affluence and influence.

0 1 2 3 4 5

- *Does the organization have representatives from the business community on the board?*
- *Are they the decision makers for their companies?*
- *Does the organization have people of wealth who are well respected in the community and have worked on other campaigns?*
- *Do at least 80 percent of the board members make generous annual gifts?*

CAPITAL CAMPAIGN READINESS QUESTIONNAIRE

6. The board has consensus on the campaign plan and goal.

0 1 2 3 4 5

- *Has the board participated in the feasibility study?*
- *Does everyone on the board approve of this project?*
- *Does at least 80 percent of the board feel it is possible to reach the goal?*

7. The board is willing to work on campaign.

0 1 2 3 4 5

- *Does the organization have influential community leaders who will work on the campaign?*
- *Will at least three members of the board serve on the campaign cabinet?*
- *Will everyone on the board play some role—solicitation, public relations, special events, etc.?*

CAPITAL CAMPAIGN READINESS QUESTIONNAIRE

8. The CEO has been with the organization at least two years.

0 1 2 3 4 5

- *Does the CEO have at least 10 years experience in the field?*
- *Is the CEO well known and respected within the field?*

9. The CEO is experienced and respected in the community.

0 1 2 3 4 5

- *Is the CEO active in chamber of commerce, civic or professional organizations?*
- *Is the CEO asked to serve as a spokesperson for issues relating to the field?*
- *Is the CEO known as a community leader?*

CAPITAL CAMPAIGN READINESS QUESTIONNAIRE

10. The staff has experience and knowledge in the area of fundraising.

0 1 2 3 4 5

- *Does the organization have a full-time director of development?*
- *Is the development staff person a member of AFP, CASE, AHP or other professional association?*
- *Is the chief development officer a CFRE or ACFRE?*

11. The staff has time to work on the campaign.

0 1 2 3 4 5

- *Is the staff free from over-involvement in special events?*
- *Does the organization have adequate clerical support?*
- *Is the staff free from over-involvement in tasks not related to development?*

CAPITAL CAMPAIGN READINESS QUESTIONNAIRE

12. A long-range plan with written goals is in place.

0 1 2 3 4 5

- *Have the board and administration developed or updated the organization's strategic plan within the last three years?*
- *Is the plan reviewed at least quarterly?*
- *Are objectives specific and measurable?*

13. Has the organization done an annual campaign in the past two years?

0 1 2 3 4 5

- *Has annual giving increased over the past two years?*
- *Does the organization have an integrated development program (special events, phone, direct mail, foundation grants, corporate appeal, etc.)?*

ABOUT MARKETSMART

[MarketSmart](#) is a revolutionary marketing software and services firm that helps fundraisers **raise more money more efficiently and be the best they can be.**

Customers include hundreds of large and mid-sized nonprofits around the world including the Smithsonian, Food for the Poor, City of Hope Cancer Research Center, The Navy-Marine Corps Relief Society, Human Rights Campaign, The San Francisco Opera, Ocean Conservancy, The United States Holocaust Museum, many colleges and universities along with other leading organizations in every sector.

MarketSmart's unique suite of solutions **help fundraisers zero-in on the donors most likely and ready to make mid-level, major or legacy gifts.** These game-changing Internet tracking technologies score each prospect's level of engagement online in order to help fundraisers prioritize who should be contacted most urgently. Additionally, our other products include:

- The [Fundraising Report Card](#) which helps nonprofits visualize their metrics while providing valuable benchmarks by sector (free for organizations with 5,000 or fewer donors);
- And the [DAFwidget](#) (BETA) which helps nonprofits generate more revenue from donor advised funds at no cost (free for all nonprofits).

Organizations implementing MarketSmart's systems and strategies have been able to revamp their approaches to mid-level, major gift and legacy gift marketing to **raise millions of dollars.**