

A Capital Campaign: Funding the Vision

Presented by Kathy Alm, CEO, PATH, Intl.

What is a Capital Campaign?



Vision of the Future

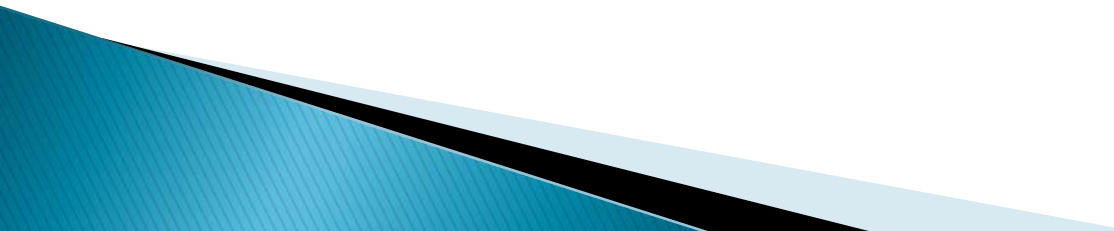


With any campaign you're going to feel like this:



Campaign Readiness

▶ Examine and Assess

- Organizational Leadership
 - Previous Fundraising Success
 - Current Donor Pool
 - Organization's reputation
 - Finance Support
 - Administrative Support
- 

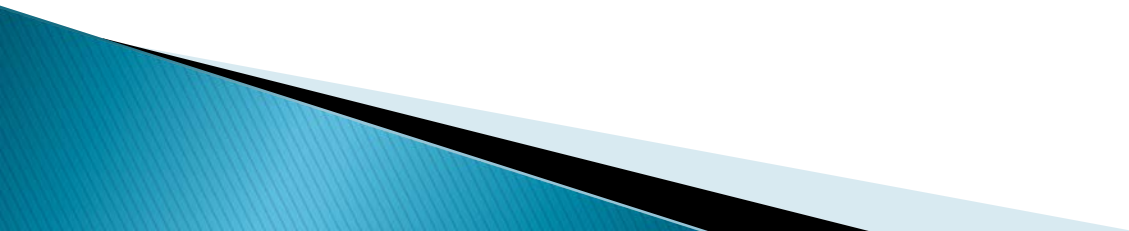
Feasibility Study

“What do you think of my idea?”



Consultants

Pros and Cons



If all of your ducks are in a row...

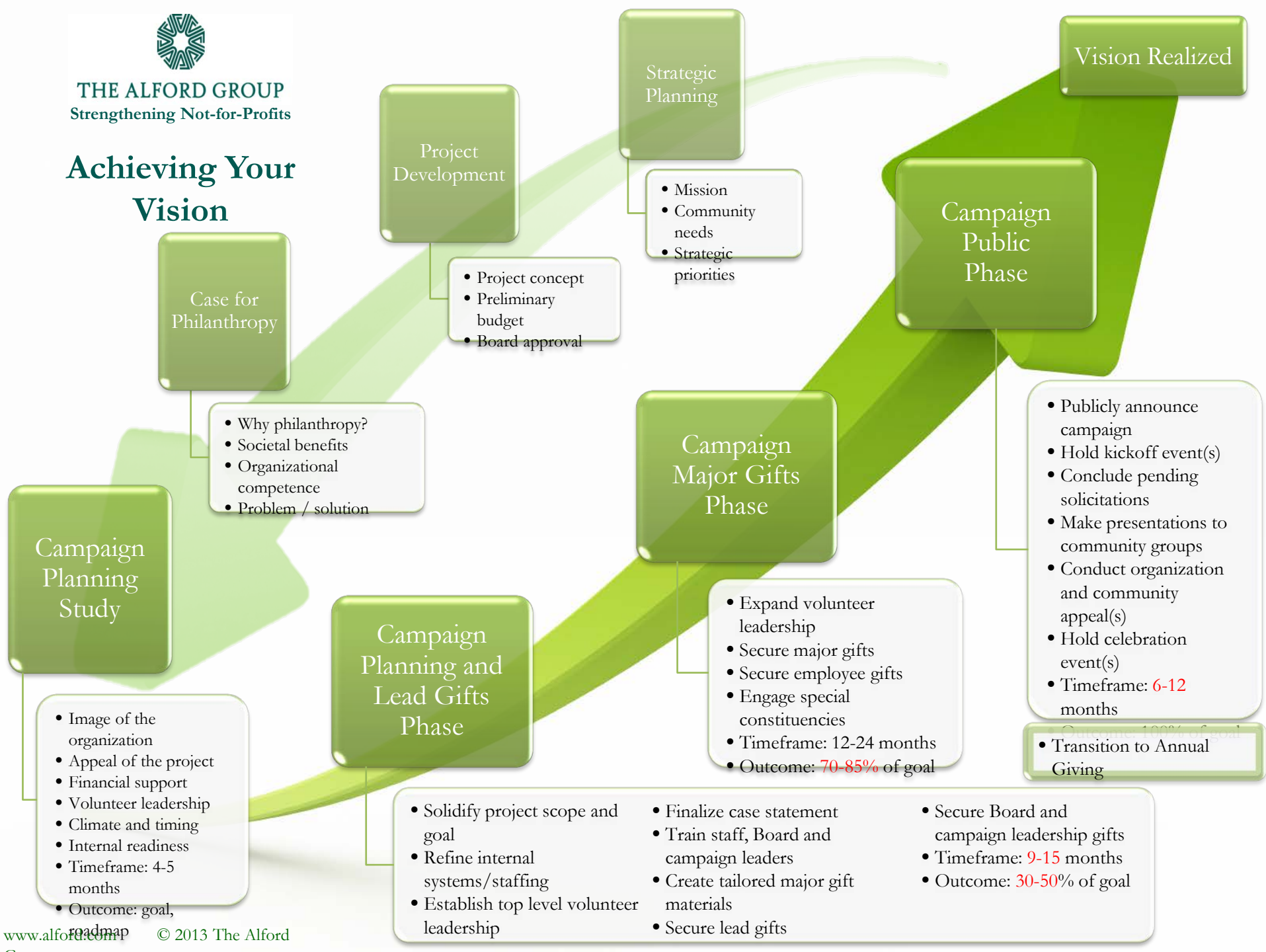


Thoughtful Planning





Achieving Your Vision



Case for Philanthropy

- Why philanthropy?
- Societal benefits
- Organizational competence
- Problem / solution

Project Development

- Project concept
- Preliminary budget
- Board approval

Strategic Planning

- Mission
- Community needs
- Strategic priorities

Vision Realized

Campaign Public 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 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

- Solidify project scope and goal
- Refine internal systems/staffing
- Establish top level volunteer leadership
- Finalize case statement
- Train staff, Board and campaign leaders
- Create tailored major gift materials
- Secure lead gifts
- Secure Board and campaign leadership gifts
- Timeframe: 9-15 months
- Outcome: 30-50% of goal

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

The image features seven 3D rectangular blocks arranged in two rows on a white grid background. The top row contains three blocks: a purple block with the letter 'B', a blue block with 'U', and an orange block with 'G'. The bottom row contains four blocks: a green block with 'D', a red block with 'E', and a dark red block with 'T'. The letter 'T' is positioned to the right of the 'E' block. Each block is brightly colored and has a white, serif font letter on its top face. The blocks cast soft shadows on the grid below them.

B **U** **G**
D **E** **T**

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?**



Senior Services

Capital Campaign

Patterns of Giving

Preliminary Goal - \$5,500,000

Number of Prospects Needed	Number of Gifts Needed	Gift Range	Total
3	1	\$1,000,000	\$1,000,000
6	2	\$500,000	\$1,000,000
9	3	\$250,000	\$750,000
12	4	\$100,000	\$400,000
30	Top 10 Gifts		\$3,150,000
21	7	\$75,000	\$525,000
36	12	\$50,000	\$600,000
45	15	\$25,000	\$375,000
102	Next 34 Gifts		\$1,500,000
60	20	\$15,000	\$300,000
84	28	\$10,000	\$280,000
102	34	\$5,000	\$170,000
246	Next 82 Gifts		\$750,000
378	Top 126 Gifts		\$5,400,000
	Many Gifts	<\$5,000	\$100,000
	Total Gifts		\$5,500,000

Timeline

Phase I

Shhhh . . .

WE'RE PLANNING SOMETHING

Fabulous!

Going Public

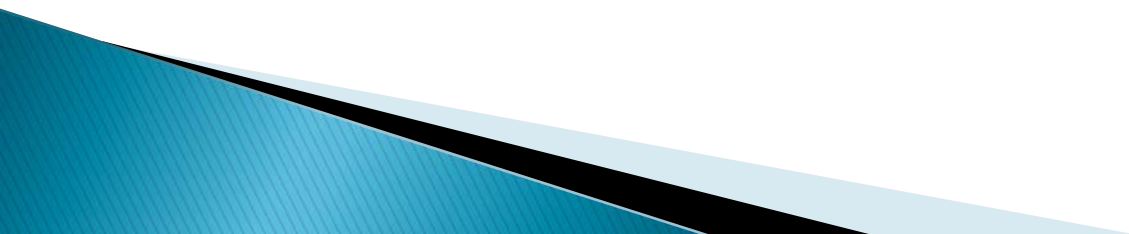


Contingency Plan

Straight Ahead



Celebrate!
celebrate!



Take a Sabbatical!

