

OVERVIEW OF HOW A CAPITAL CAMPAIGN GENERALLY UNFOLDS

Your capital campaign should be conducted in momentum-generating phases designed to position the organization as a highly visible, prized community asset and raise the maximum amount of money.

This is accomplished through creating a campaign plan that strategically engages volunteer leaders and schedules sequential gift solicitation (attracting the largest gifts first and closing the campaign with the smallest gifts).

It is essential to recruit the best volunteers and involve them in an appropriate, effective and efficient manner throughout the campaign. *In doing so, you develop their appreciation for your value, increase their sense of ownership of your vision and mission, and enhance the prospect of their commitment as lifelong partners.*

Campaign Solicitation Phases: Leadership, Major, and General Giving

- **Leadership Giving** refers to very significant, large gifts, given by those with considerable wealth. These are the first gifts solicited during the period which is often called the quiet phase. These lead gifts are solicited most often from those who have a history with the organization and by their size and intention they serve to “anchor” the campaign and thus generate momentum to sustain fund raising for the balance of the campaign. Many gifts of this size have an element of planned giving, i.e. the use of financial means other than cash, a consideration for tax implications, and attention to how such a gift impacts one’s estate. It is anticipated some donors at this level may wish to make both capital and endowment commitments.
- **Major Giving serves as the transition** between the quiet and public phases. This is when the balance of the larger gifts is solicited and volunteer leadership is recruited and prepared to take the campaign public. Some of these gifts may also include elements of planned giving, and again some of these donors may also make combined capital and endowment gifts.
- **General Giving:** In this phase, the campaign reaches out to community prospects for the solicitation of a vast array of smaller gifts. Many opportunities will present themselves over the course of the campaign and final decisions

about general appeals are likely to be made closer to the end of the campaign.

- **Corporate and Foundation Giving** spans across the phases of the campaign. Depending upon the strength of existing relationships with corporations and the compatibility of the organization's programs with foundations' objectives, there may be significant leadership giving from these sources. Nevertheless, historically across all types of institutions, the greatest portion of campaign revenue comes from individuals. When organizations are reliant upon corporate and foundation giving for the majority of their campaign revenue, most often they have either over-estimated such support or underestimated individual support.

The Campaign Conclusion/Transition phase includes the formal wrap-up of the campaign, donor and volunteer recognition and an internal campaign audit. The process includes normalizing new functions, such as more robust programs in planned and major gifts, annual giving, donor recognition, and data management. These new capacities are necessary to fully capitalize on the success of the campaign and to support an enhanced, ongoing fund development program.

The elements that make up the campaign include:

Campaign Steering Committee (or Campaign Cabinet)

Campaign Committees

Comprehensive Campaign Plan and Calendar

Updated Gift Acceptance and Donor Recognition Policies

Gift Acknowledgment Procedures

Volunteer Development and Stewardship

Prospect Identification, Rating, Cultivation and Stewardship

Solicitation and Board Training

Donor Relations Program

Naming Opportunities

Campaign Communications/Materials

Regular Progress Reporting

Campaign Events

Conclusion and Transition/Evaluation/Reporting