



6 STEPS TO PLAN A SUCCESSFUL CAPITAL CAMPAIGN

INTRODUCTION

A capital campaign can be a viable solution when you need to raise substantial funds to pay for large projects that aren't included in an annual budget.

Project examples include – Adding a new building, expanding an existing structure, renovating or restoring a facility, major repairs to a structure, and many others.

- Capital campaigns are complex endeavors that require advance strategy, planning, and execution, along with a committed team to ensure the campaign's success.

Steps outlined next *will help you to better understand the basics of creating a capital campaign.*

The **6 Steps to Plan a Successful Capital Campaign** is one of the companion tools designed to accompany the **Capital Campaign Template Video** in the Nonprofit Toolkit training series.

FUNDRAISING CAN BE DAUNTING

Whether you're a newcomer or an expert, fundraising can be a challenging endeavor –

- Newcomers ask, “Where do we start?” or “What do we do?”
- Experienced fundraisers wonder, “How do we reignite our base?”

Follow these 6 Steps to guide you along your capital campaign fundraising journey.



STEP 1: ESTABLISH A COHESIVE TEAM

You'll need to establish a cohesive working team to embark on your fundraising initiatives.

Think about who needs to be involved with the team, such as –

- ✓ Staff
- ✓ Board Members
- ✓ Other Pertinent Individuals



STEP 2: DETERMINE YOUR NARRATIVE

You'll need to describe to your audience how you want them to perceive you.

To get started, answer these sample questions –

- ✓ Is your organization “on the move?”
- ✓ Does your organization emphasize family relationships?
- ✓ Does your organization focus on involvement in small groups?
- ✓ Is your organization focused on serving others?
- ✓ Do others perceive your organization as a beacon in the community?
- ✓ Is your organization growing, and if so, how?



STEP 3: SHOW, DON'T TELL

To help your audience embrace your cause, share engaging visual elements with them to illustrate how the funds you raise will benefit the cause –

- ✓ When you use a visual element to show your audience the campaign outcomes, you can create a more memorable impression than simply providing a written explanation.
- ✓ Visuals also help audiences to better understand complex concepts in ways that are easy for them to understand.

Examples of visual designs include –

- ✓ **Charts & Diagrams** – Flowchart, and column, bar, line, or statistical chart
- ✓ **Infographics** – Informational, comparisons, lists, or statistical data
- ✓ **Images** – Photos, illustrations, or graphics



STEP 4: PRESENT YOUR BUDGET

Convey the “big picture” of your budget to your stakeholders, which may include your organization’s executive team and/or Board of Directors.

- ✓ Present the budget in narrative form, including a brief summary of the purpose of the capital campaign, the total budget you need, and how you calculated specific costs.
- ✓ Avoid discussing every detail of the budget –
 - Instead, include an overview of the most essential information that stakeholders need to know, such as the **main goals** you want to achieve and **how you’ll use the budget** (e.g., *consulting services, campaign resources, help with interpreting and obtaining local or regional regulatory approvals*).
- ✓ **Examples of reference content include:**

An outline, chart, or infographic highlighting the most salient points of your presentation.

 - Distribute the reference content to your audience before, during, or after the presentation, based on when the content will be the most effective.

► **TIP:** Provide reference content for your audience to visually understand the concepts you present. Content should be clear, concise, and engaging.



STEP 5: SHARE COMMUNITY TESTIMONIALS

Think of examples of the positive impact that your organization has had on the community –

- ✓ Then, ask community members who have been part of that impact to provide you with their testimonials, or stories of faith, which highlight how your organization has been vital to them and others in the community.
- ✓ Share the testimonials as part of your campaign as evidence of your organization’s importance to the community –
 - You can also include the names and photos of members who provided testimonials if you first obtain their permission.

► **TIP:** Ask community members to share their heartfelt stories and concrete examples that are especially relevant in showcasing how your organization directly affected them.



STEP 6: IDENTIFY COMMUNICATION METHODS

Determine how you can thoughtfully convey your narrative to donors.

Review the following communication options to help you decide which ones may work best to meet your goals –

- ✓ Digital letters sent to donors via email
- ✓ Print letters mailed to donors’ addresses
- ✓ Phone calls to donors
- ✓ Personal visits to donors
- ✓ Announcement(s) in your organization’s email or print newsletter
- ✓ Announcement(s) on your organization’s social media accounts (e.g., Facebook, LinkedIn, X)
- ✓ Presentations to the congregation during worship

For more information, please email or call our experts ~

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