Capital Campaigns from A to Z

Pre-Campaign Planning
Are You Ready for a Capital Campaign?

• One year to 18 months before a Campaign starts, you need to begin planning
• Planning = 95% of the campaign work
• Use planning to strengthen your volunteers, the faculty, the community
• Planning gives you (the Development Officer) the time to identify donors/volunteers
• Create a strong annual fund, cultivate donors, work with the Board
Let’s get started: Tools

- Strategic Plan
  - How to get it organized
  - Galvanizes community to work together
  - Provides a blueprint for the campaign (and for the school’s future)
  - Clearly outlines the vision, hopes, and dreams of the institution
  - Gets Board and volunteers invested
Tools, continued........

• Leadership - Who are your leaders?
  • Board (are they ready and willing to give and get?)
  • Head of School (understands development and his or her role? Does (he/she know the constituents?)
  • Volunteers (Is there someone in your constituency who could lead this campaign?)
  • Development Officer (experienced, trusted, etc.?)
More tools........

- Case for Support
  - What are you raising money for?
  - Is the project well-defined and can everyone articulate it?
  - Is the need perceived by the community as a real one?
  - What is the price tag?
  - Can you write this all down into a cohesive piece (which will later be the brochure?)
Development Office – Reality Check

- Director
  - Tenure
  - Knows community
  - Can sell the school
  - Has experience
  - Has credibility

- Staffing
  - Enough people to do the job?
  - Strong team
  - Job Descriptions
  - Commitment to
    - School
    - project
The Budget

- Over three years
- Should represent 6-10% of campaign goal
- Separate from operating
- Covers the cost of running campaign and the campaign should pay it all back
- A good time to get what you really need
- Remember, it takes money to raise money......
THE tool.....The Feasibility Study

• How it works

• Why it’s important
  – Gives you an outside opinion on the potential of the campaign
  – Supports the Development Office
  – Identifies volunteer leadership
  – Identifies major donors
  – Identifies problems
  – Identifies the goal
  – Is a great cultivation of early, bigger donors
Next Steps......

• **Identify** campaign chair(s)
• **Identify** Steering Committee
  – Board members
  – Top volunteers from annual fund, events
  – Alumni, parents of alumni, grandparents

• **Recruit** Steering Committee
  – Personal ask by you, Head, or campaign chair(s)

• **Train** Steering Committee
Solicitation begins:
The Silent Phase

• Board President
  – Can be asked by Campaign Chair(s) & Head

• Steering Committee Chair(s)
  – Should be solicited prior to training

• The ENTIRE Board
  – Either by Chair(s) and/or Board President

• The Steering Committee
  – By Campaign Chair(s) and/or Board President

• Key Major Donor Prospects
Now you’re ready for a Capital Campaign!

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