

Phases of a Successful Campaign

Most capital campaigns consist of five specific phases with specific goals. Setting "phase goals" is a critical component of monitoring the progress of the campaign. It's important that leaders can evaluate the progress so as to avoid unpleasant surprises at the end of the campaign. Fundraising plans can adapt to changing circumstances if things aren't going well – as long as the leadership knows things aren't going well. For each phase, set a financial goal and then, at the end of each phase, evaluate whether that target has been met.

The traditional phases of a capital campaign follows.

Phase One – Pre-Campaign Planning

This phase allows the volunteer and staff leaders to seriously evaluate their commitment to a campaign – as opposed to their commitment to a new building or equipment – and start to develop the basics in preparation of conducting a successful campaign. Included in this phase is a careful internal evaluation of needs, discussion of whether or not campaign counsel is needed, and an honest appraisal as to whether the organization is ready for such a major undertaking.

Phase Two - Design & Marketing Phase or "Feasibility Study"

This initial phase, usually conducted in six to eight weeks, allows an organization, with the aid of counsel, to objectively evaluate:

- its image in the community
- how its case for fund raising is viewed by leaders and donors
- whether quality leaders are available to help in the campaign
- prospective donors and potential giving levels
- whether proper resources are available to conduct a campaign

Additionally, a detailed, comprehensive *fund-raising plan* is developed. The campaign plan includes lists of prospective donors and leaders, timetables, job descriptions for leaders, commemorative opportunities, an education and public relations plan, and other necessary ingredients to a successful campaign.

A thorough *Case Statement* is prepared for initial review by the Council.

Phase Three - Organization Phase

This phase creates the tools necessary for fund raising.

- Leadership Plan Book
- Fund Raising Prospectus

- Fund Raising Brochure
- Video Presentation
- Develop Campaign Theme
- Case Statement
- Leadership Recruitment
- Public Relations Effort
- Detailed Corporate and Foundation Research

Phase Four – Solicitation Phase

This phase is the central phase of the campaign and focuses on the actual cultivation and solicitation of major and advance gift prospects. Additionally, proposals to regional and national foundations and corporations are prepared and submitted. The full public information and public relations plan is implemented.

Phase Five – Post-Campaign

This phase is a "catch all" for outstanding solicitations remaining from earlier phases. Many of the decisions will actually be made in this phase, so effective follow-up and public relations efforts are critical here.

All prospects are encouraged to make their decision during this phase if they have not yet responded.

A comprehensive pledge redemption system is also recommended.