

# Feasibility Study to Funding: Can Our Capital Campaign Be Successful and How Will We Make That Happen?

Rick Blain, CFRE



For



Why do people give to a particular institution or organization?

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# What motivates one to give?

- Case for support
- Benefits
- The ASK

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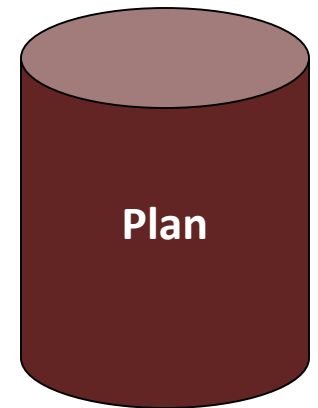
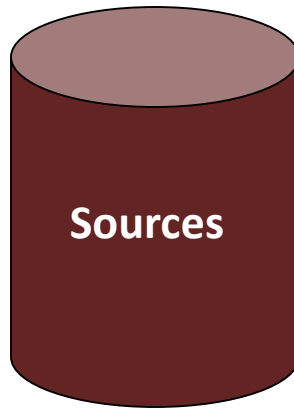
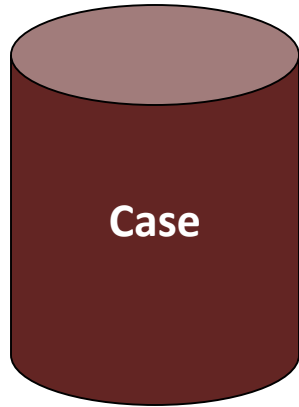
# Secondary Motivators

- Pledges vs. Outright Gifts
- Gift Vehicles
- Recognition & Naming Opportunities
- Challenge Gifts
- Promotional Materials

*Ask me about the NY Philharmonic,*

*Andrew Carnegie & \$60,000*

# Capital Campaigns: Four Footings



# Needs

What do you need to raise funds for?

Why do you go to the hardware store?

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# Types of “Capital” Campaigns

- Traditional
- Endowment
- Debt Reduction
- Comprehensive

# Feasibility Study

Testing the Case for Support



# Do we need a feasibility study?

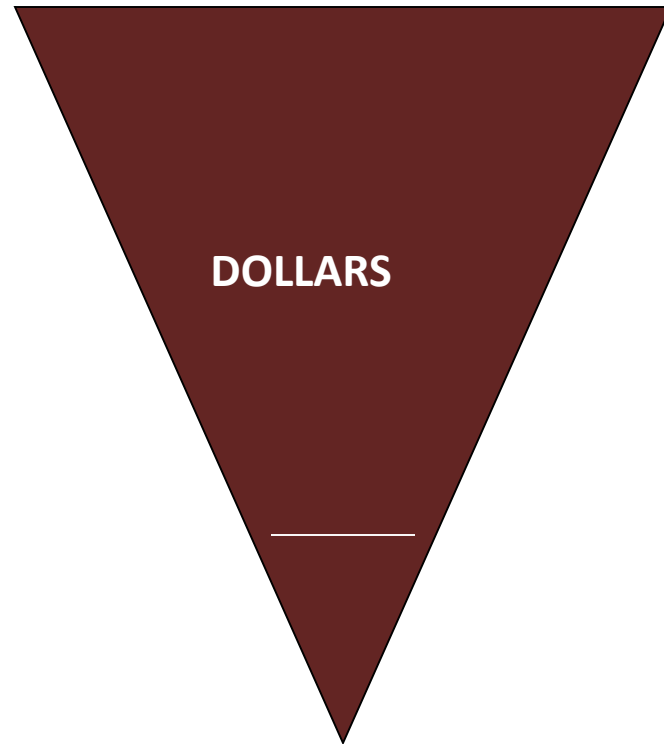
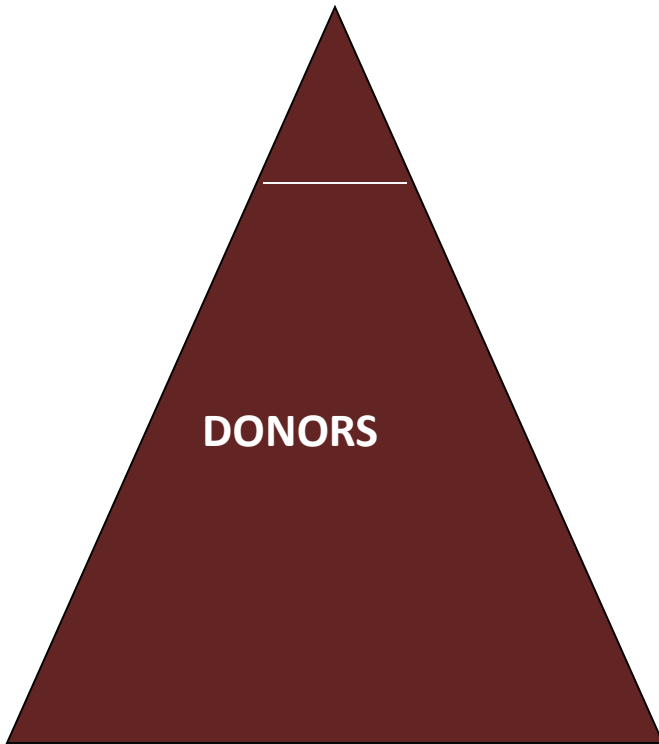
"Going into a campaign without careful examination is comparable to rushing into surgery without a thorough probing and exploration (examination)."

Jerry Panas

# Feasibility Study

- Appealing
- Achievable
- SWOT
- Leadership
- Lead donor(s)
- Major Gift Prospects
- Timing

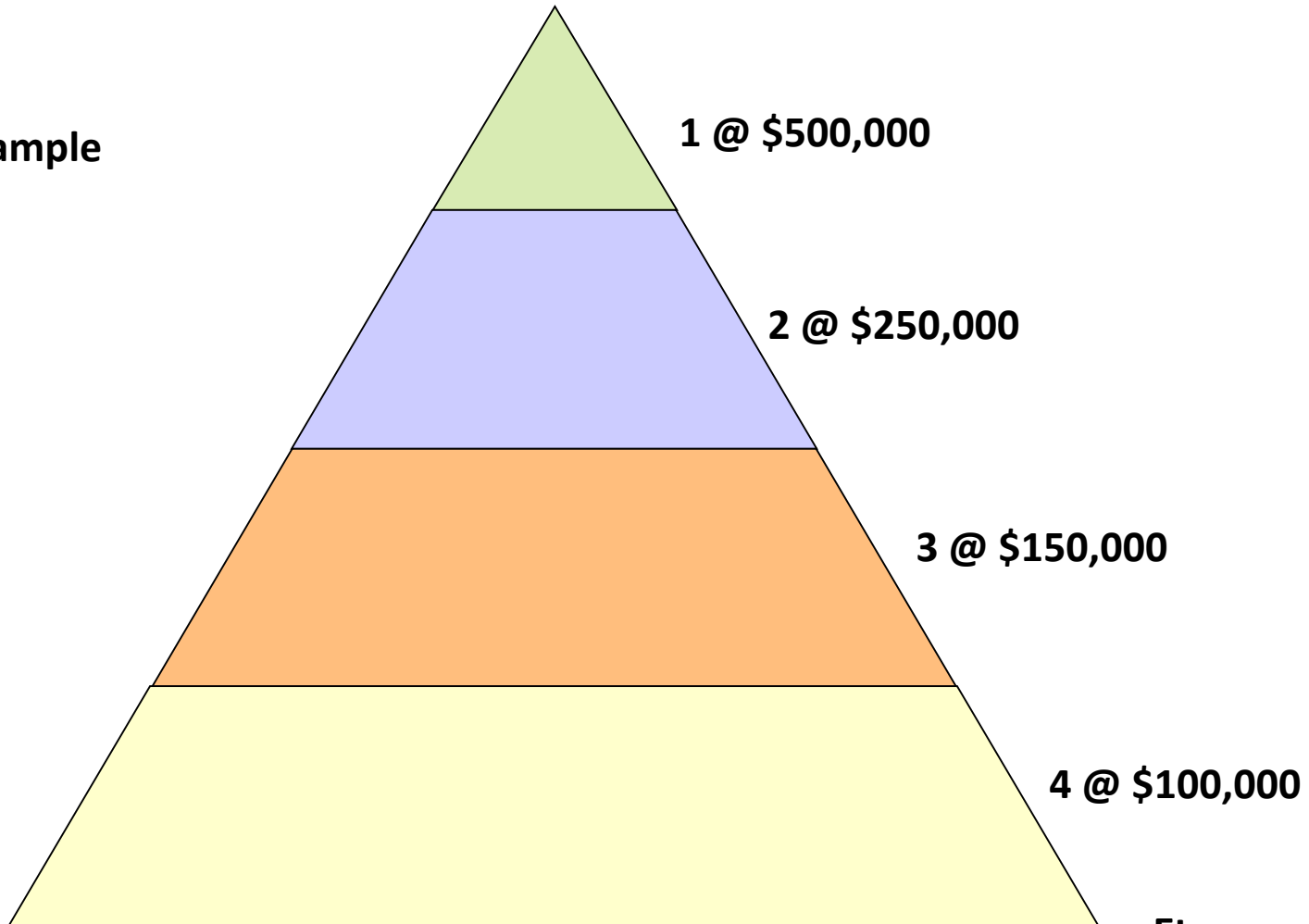
# 80/20 Principle



# Campaign Gift Pyramid

## \$5,000,000

Example



Etc.

# Typical Campaign Phases

- Planning & Preparation
- Leadership Giving: “A Quiet Phase”
- Major Gifts: “A Quiet Phase”
- General Solicitation: “The Public Phase”
- Celebration & Implementation

# Planning & Preparation

- Based upon feasibility study
- Developing the Case Statement
- Revising the Gift Pyramid
- Collateral Materials
- Enlisting Campaign Counsel
- Recruiting & Training Campaign Leadership
- Ensuring Adequate Staffing
- Preparing the Budget

# Always Personal

- Leadership Giving: Face-to-Face
- Major Gifts: Face-to-Face & Small Groups
- Public Phase: Expanded methods

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# Always Personal

Emotion vs. Intellect

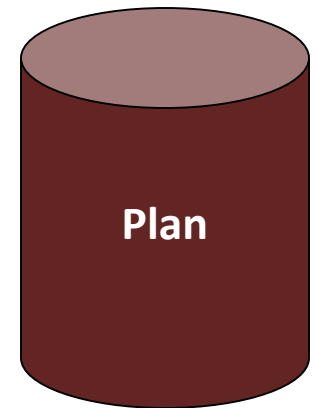
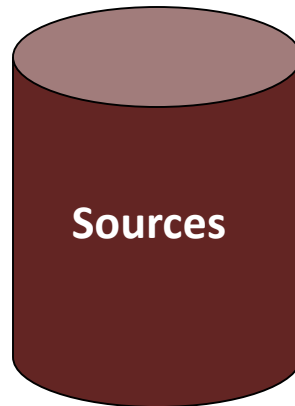
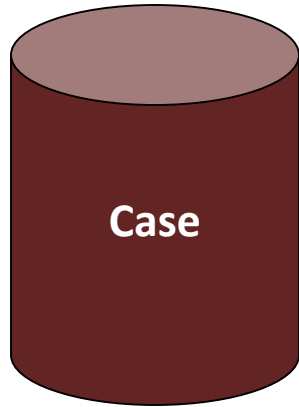


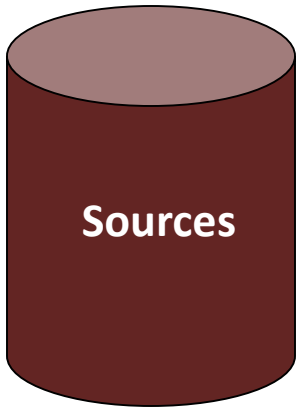
To have a successful  
capital campaign . . .

You first must have a strong,  
successful annual fund . . .

Not necessarily, but . . .

# The Four Footings Must Be In Place



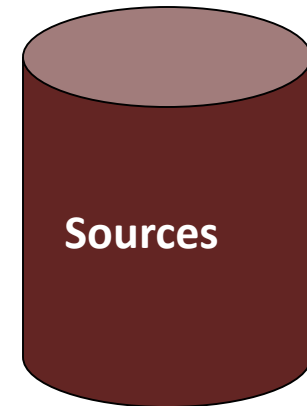


# The Four Footings: Sources

- Individuals
- Corporations
- Foundations
- Organizations

# Identifying & Qualifying MGPs

- Donor database
- Board
- Campaign Cabinet
- Staff
- Peer Screening
- Electronic Screening
- Prospect Research

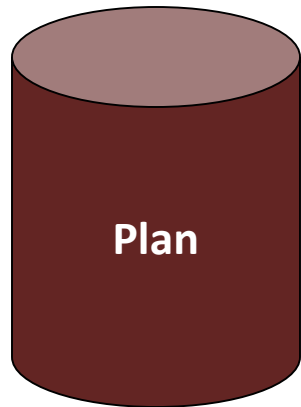


# The Four Footings: Leadership



- Board Role
- CEO Role
- Campaign Cabinet: Campaign Leadership

# The Four Footings: The Plan



- Achievable Goals/Objectives
- Commitment of institutional/organizational leadership
- The first three footings
- Campaign Counsel
- Projected Timeline
- Budget

# Advantages of a Campaign

- Expand Awareness
- Build Community
- New Leadership
- New & Important Relationships
- Broaden Base of Support
- Positioning for Future Growth

# The “Down-Side”

- Long & Arduous Work
- Stretching the Staff
- Potential for Donor & Volunteer Fatigue
- External Conditions Not Within Our Control



# Defining Success

What if we don't quite reach our goal?

# Can Our Capital Campaign Be Successful and How Will We Make That Happen?

## Some Key Questions:

- Is the campaign necessary?
- Do we have the resources? (four footings)
- Is our case for support compelling enough?
- Is our leadership fully committed?
- Is our goal achievable?



*If you remember nothing else . . .*

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*Thank you for your attention and participation . . . Rick*

