

Creating a Successful Capital Campaign

Do you need to renovate or build new facilities? Fund special projects? Or simply build capacity for future initiatives. Capital campaigns invite your donors to make special gifts over and above their recurring, annual donations. In this session, we will explore the planning, preparation, and communication elements to fuel your mission and vision. We will also study a few “failures to launch” and some monumental successes.

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Introduction: Revisiting the Spirituality of Fundraising

Many church leaders and volunteers feel uneasy about asking others for money. This is not surprising, but it has everything to do with our view of money. Those seeking funds should view it as a central part in pursuing the Lord’s work. The gift itself is simply a matter of stewardship between the giver and the Lord. The person asking is simply making a request and invitation to join in the opportunity to be rich toward God. The integrity and authenticity of the requestor is a given in this environment. Helping people potentially align with meaningful Kingdom-building assignments is a reward in and of itself!

1. Counting the Cost

“For which of you, desiring to build a tower, does not first sit down and count the cost, whether he has enough to complete it? Otherwise, when he has laid a foundation and is not able to finish, all who see it begin to mock him...” Luke 14:28-33

- a. We know that Jesus is discussing the cost of discipleship in this passage. However, the principles apply to our topic. He is underscoring the importance of sitting down and weighing the cost before beginning.

2. What is a Capital Campaign?

- a. Simply put, a capital campaign is a focused fundraising initiative designed to raise a larger and specific amount of money over a specified period. Sometimes these efforts can extend for multiple years. Most campaigns succeed because the funds will be used for a growth-related project. Some examples include one or all the following:
 1. A new building or expansion
 2. Purchase of equipment

3. Expanding the organization staff and programs
4. Creating and seeding an endowment fund

3. The Four Phases of a Capital Campaign

- a. Planning Phase
- b. The Quiet Phase
- c. The Campaign Kick Off
- d. The Public Phase

4. Mapping our Your Objective and Goals

- a. Goal setting is a process to determine an initial goal but also a chance to test and refine it before entering the quiet phase.
- b. A well thought through timeline will give the committees, stakeholders, and staff various milestones to aim for during the course of the campaign. The timeline should be based on the four phases of the Capital Campaign.

5. Feasibility Study and Case for Support

- a. The feasibility study will examine your universe of supporters, the demographics, and other stakeholders that may join the effort. This stage requires an honest analysis of the landscape of prospective support and the potential weak areas prior to any launched fundraising efforts.
- b. The Case for Support or Case Statement is a set of positional statements that articulate why the mission matters, the expansion or improvements being sought, and how much it will cost to accomplish the objectives.
- c. The Feasibility Study and Case for Support are useful guides during initial stakeholder conversations and events.

6. Building Your Campaign Team

- a. Campaign Chairperson

- b. Board Members
- c. Committee Members
- d. Volunteers
- e. Fundraising Professionals (consulting)

7. Benefits of Thorough Planning

- a. Serves as the foundation for your case for support
- b. Provides confidence and time to reflect on the Lord's leading
- c. Build a cohesive team

8. The Gift Pyramid

- a. This is a visual aid that easily summarizes the total amount needed and the number gifts in each donation category.
- b. It is an indispensable tool during the quiet phase of the campaign. The strategic order of gifts needed also narrows the organization's focus to begin to attach prospect names to giving levels.
- c. This allows an assessment of the number of qualified prospects needed to reach the goal.

9. Budget

- a. When putting together the campaign budget, you will be building the framework for the flow of money associated with bringing the vision to fruition.
 - i. The budget may evolve somewhat as the campaign progresses, so it will be helpful to begin by asking what percentage of the funding is dependable. And what are variable expenses that may need flexibility?
- b. Inputs for your campaign will be pledged unrestricted gifts, funding from foundations and government bodies that can be put toward the campaign, and other funds you've saved that can be safely put toward a multi-year campaign.

- c. Outputs will be all the expenses associated with your campaign, including staffing, consulting, necessary upfront technology investments, and eventually the marketing and events that will be part of the public phase.

10. Communications and Marketing

- a. With a solid approach to internal communications and marketing, your team will work well together and rely on each other. You'll need an organized system for disseminating information, coordinating activities, reporting, and later- public communications.
- b. The quiet phase of the campaign will come into play by way of one-to-one conversation with donors. Garnering that first tranche of financial commitments will propel your campaign into the next phase.
- c. When you reach the public phase, your marketing strategy will be designed to spread the news about your campaign and build enthusiasm for your cause, culminating in commitments, and donations. This initiative will feature various forms of communication, including but not limited to:
 - i. Physical art like posters, flyers, postcards
 - ii. Email and newsletters
 - iii. Social media posts and messages
 - iv. Videos across platforms
 - v. Text messages
 - vi. Events and intimate gatherings
 - vii. Web materials and landing pages
 - viii. Television and radio ads

11. Donor Recognition

- a. Personalized thank you messages are of utmost importance. Thank you, thank you, thank you.
- b. Meaningful gifts and tokens of appreciation
- c. Affinity events and gatherings to demonstrate genuine appreciation and celebration of progress

- d. Naming opportunities can be appropriate based upon the campaign

Conclusion

Your capital campaign plan is the blueprint that will guide you throughout your entire capital campaign. Like a blueprint for a dream home, it should be detailed enough to provide you and your team with clear directions on what your campaign will look like and everything that needs to get done for you to reach the finish line. Planning now will save you stress and confusion down the line, and illustrate your organization's campaign readiness to your staff, board members, volunteers, and donors.

Resources:

Kihlstedt, Andrea. *Capital Campaigns: Strategies That Work. 3rd Edition*. Jones & Bartlett Learning. February 2009.

<https://donorly.com/thedonorlyblog/capital-campaign-plan#basics>

<https://averillsolutions.com/fundraising-feasibility-study-questions/>

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<https://capitalcampaignpro.com/new-research-capital-campaigns-2023/>