

## Seven Keys to a Successful Capital Campaign

Brian Holmes

Room

Thursday 24<sup>th</sup> February 2011

3.45pm

## Definition

A Capital Campaign raises LARGE sums of money for a one-off specific need outside of the annual operating cost of an organisation.

The benefits of a Capital Campaign are that it raises:

- the most amount of money;
- in the shortest period of time;
- in the most cost efficient way.

## Seven Keys to Success

1. Market Research – due diligence
2. Case for Support – emotional strategy
3. Marketing Collateral – tools that talk
4. Leadership – peer to peer strategy
5. Gift Prospects – market strategy
6. The Ask – blending the science with the practitioner's art
7. Campaign Management – the fast track to success

## Capital Campaign Factory

Your online  
guide to capital  
campaign success.

Capital Campaign Factory provides you with a range of free tools and resources that will assist you with every step of the campaign process.



# 1. Market Research

## 1. INTERNAL

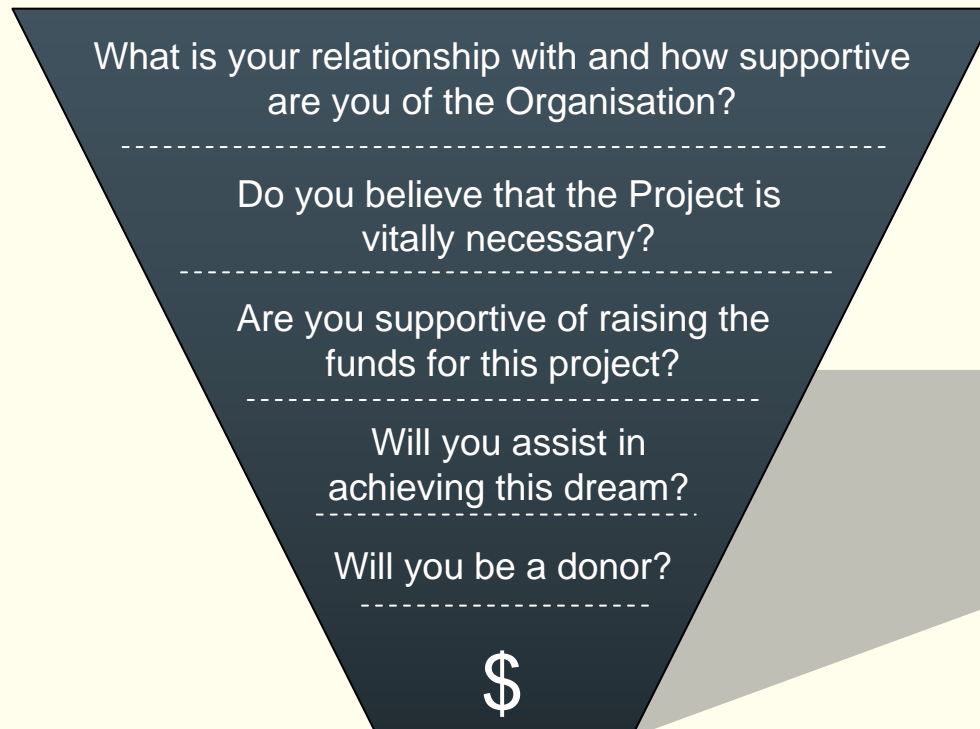
Your organisation's readiness to ask



## 2. EXTERNAL

Your community's willingness to give

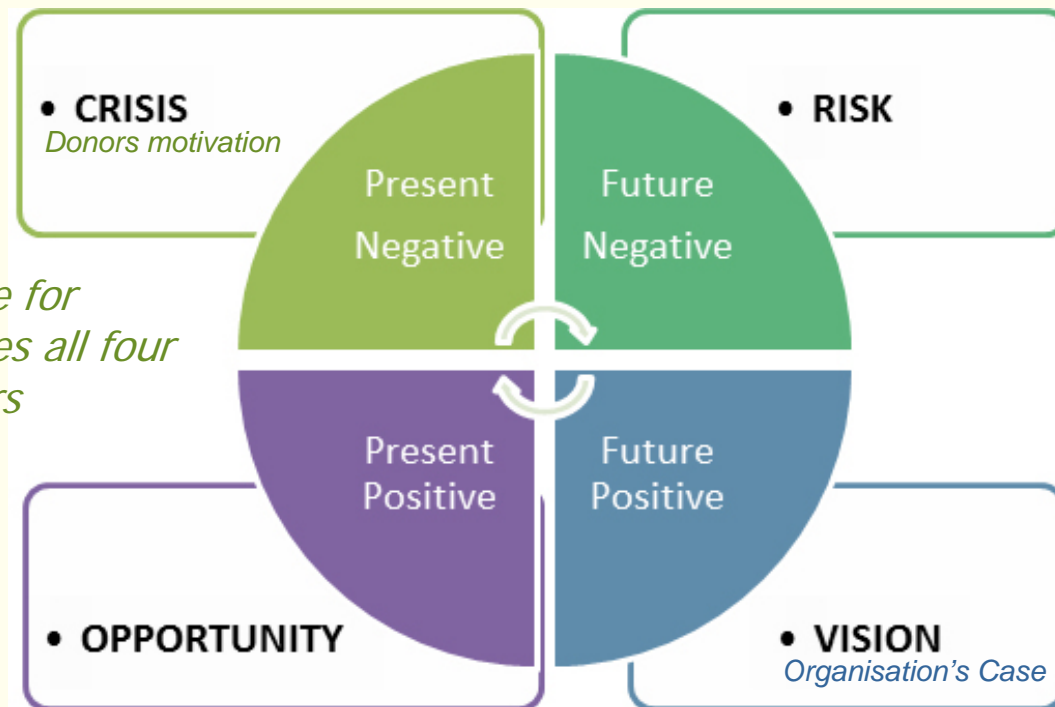
# 1. Market Research



Brian's Big Tip: *Always use an experienced Consultant for a Feasibility Study. Good interview technique is vital.*

## 2. Case for Support

*Ensure your Case for Support addresses all four motivation factors*



*Thanks to Bernard Ross*

## 2. Case for Support

### Why would someone give?

Your Case must:

- make Sense
- be Reasonable
- be Compelling
- be Motivating
- be Succinct



Brian's Big Tip: *Use testimonials of other donors more than case studies of your service or clients*



### 3. Marketing Collateral

#### CC Promotional Materials

- Campaign Brochure
- Campaign Video
- Invitation Shells
- Document Covers
- Web Page
- Newsletter
- Stationery



Youtube – [“The Girl Effect”](#)

### 3. Marketing Collateral

Generally a Capital Campaign is prestigious

Your collateral should be:

- quality
- visual
- emotive
- succinct
- creative



Brian's Big Tip: *Campaign materials must be unique. Donors will hold on to a quality brochure.*

## 4. Leadership

### The most important factor in any campaign

A great campaign leader should:

- be affluential
- be influential
- be motivational
- have strong networks
- not be afraid to ask

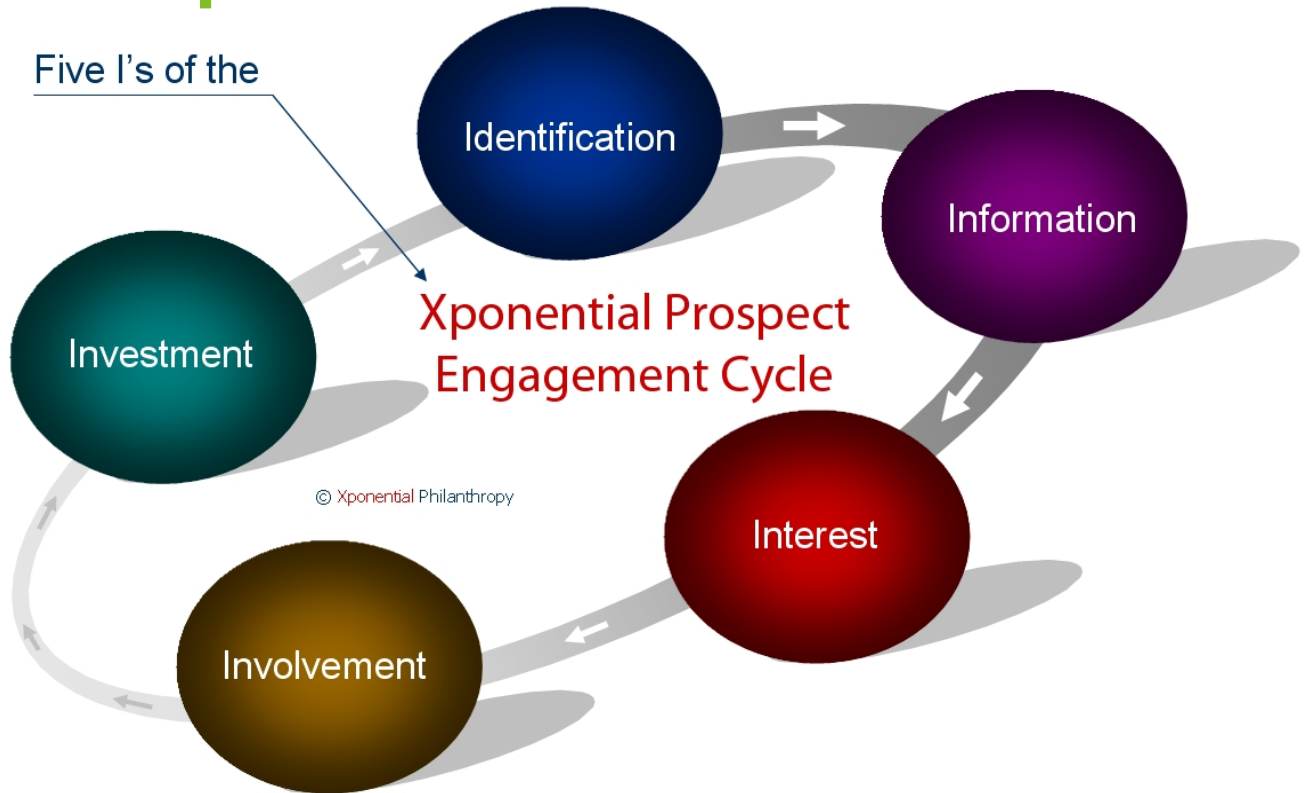


Brian's Big Tip: *Use maximum peer to peer influence when recruiting your campaign leaders.*

## 4. Leadership



## 5. Gift Prospects



## 5. Gift Prospects

The key to working with prospects is moves management

Suspect	Prospect	Warm Prospect	Hot Prospect	Pending Decision	Donor
800	400	266	177	133	100
Initial Suspects	Preliminary Profiles	Comprehensive Profiles	Presentations (Asks)	Negotiations	Stewardship
25 days	50 days	133 days	89 days	67 days	50 days

Total days 364

Brian's Big Tip: *A quality donor management system is an essential tool for a successful capital campaign*

## 6. The Ask

**You only get one chance - *maybe***

Four elements in the ask:

1. The Prospect
2. The Solicitors
3. The Organisation
4. The Environment



Brian's Big Tip: *Seek to use a 'team of two' for any VIP solicitations.  
Never use more than three.*

## 6. The Ask





## 7. Campaign Management

**A good campaign management team must:**

- be courageous
- be confident
- be experienced
- be focussed
- be flexible
- know how to use the 'tools of the trade'
- be able to think like a major donor



**Brian's Big Tip:** *Every team needs both players and a coach. If you are going to play to win recruit the best.*

## Thank you

Brian Holmes

*sms me for a coffee during conference*

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