



## ARCHDIOCESE of OMAHA

*Stewardship & Development Office*

### Capital Campaigns

#### Major components to consider

Following are some of the important items that need to be considered before launching a capital campaign:

#### A Clear Case

Your parish or school must be able to clearly articulate the vision for the funds raised for this campaign. Best case scenario, it comes from your strategic plan. The priorities being addressed should not be determined in a vacuum or by one or a few people. Input from your leadership and other stakeholders will help in your ability to explain the vision and the impact of the campaign on your parish, school or ministry.

#### Feasibility or Planning Study

A planning study not only helps you understand the level of interest in the campaign plans from your community and from individuals, but also the giving levels that may be possible. This process should be as extensive as possible, involving as many stakeholders as possible. The other benefit is the cultivation that occurs during the process and the opportunity for people to talk about their appreciation and/or concerns for the parish, school, project, etc.

#### Infrastructure

- Do you have a strong data base with accurate contact information and record of giving history of all constituents (parishioners, alums, parents of alums, former staff, etc.)
- Do you have staff to prepare and process all mailings, to track giving, to send timely acknowledgements, to send reminders. You may have staff doing this now, but do they have the time to add on the additional work.

#### Plan and Timeline

A well thought out, thorough and written plan and timeline is critical. They need to include such components as the feasibility/planning study, leadership recruitment, preparation of all communication materials, launch events/gatherings, major gifts phase, general gifts phase, follow up, pledge redemption.

## Leadership Structure

It is essential to create a strong leadership structure with clear role descriptions and build a team with people who will take on these roles. The involvement of your pastor, principal and other key parish/school leadership is critical.

Some of the key responsibilities include:

- They lead with a personal gift
- They are willing to meet face-to-face with people to invite their gift to the campaign
- They are willing to be strong ambassadors and spokespersons for the campaign and the school/parish

## Solicitation Plan

Before launching a campaign, the solicitation plan must be established.

- Who will be asked for their support in person? How much will you ask? Who will make the ask?
- Determine the gift sizes needed for the campaign to be successful. Create a gift chart identifying levels of giving and numbers of prospects.
- What gifts will be accepted and/or counted toward your goal? Will planned gifts, gifts designated to items not in your case be accepted or counted toward the goal?
- Will you have naming rights for any gifts? What is the criteria?
- Who will be asked via direct mail? How much? Who prepares the letter? Signs? Sends?
- Who conducts follow-up calls and to whom?
- Who conducts follow-up calls to those who do not respond?
- If a parish, how will the very important in-pew solicitation be conducted?

## Communication Plan

Communication before, during and after the campaign is key to its success. People need to know the vision, the plan, the process, the impact, etc. The efforts need to be comprehensive, consistent in appearance, professional and thorough in order to give donors confidence in their prospective giving.

Following are a few of the communication components necessary:

- Collateral material: case statement, solicitation packets, solicitation letters, acknowledgement letters, commitment forms, envelopes, invitations for events/gatherings
- Ongoing communication needed: pulpit announcements, bulletin announcements, information on your website, ongoing updates to donors and prospective donors via newsletters, letters, electronic communication and committee meetings/activities
- Other opportunities: posters, signage in church, school, construction site, other community establishments; social media; media relations with your local newspaper etc.

## Events

Events are helpful for cultivation, building enthusiasm and stewardship. They need to be well planned, with a clear purpose and well attended. It takes a great deal of work to ensure this happens. A few events that can be helpful to the success of a campaign:

- Leadership kick off gatherings to inspire leaders to give and to fulfill their important role. They need to understand their value to the process.
- Information events: gatherings that introduce the vision and the plan that set the stage for inviting constituent support.
- Gratitude events: Events at the conclusion of a campaign to acknowledge leaders, donors, volunteers and to showcase the impact of the campaign. Purpose is to also encourage fulfillment of commitments.

### Other Critical Questions to Consider

- Other ongoing development activities
  - How will you make certain the campaign does not negatively affect your other fundraising activities or offertory? If you have an annual giving or stewardship renewal program, do you ask for support of both at the same time?
  - How is this process going to be staffed and who is going to hold staff, leadership, volunteers accountable? Who will monitor timeline and troubleshoot?
  - Will you hire a consultant? This can be the difference maker for many campaigns to offer professional guidance and oversight; they are hired to hold people accountable to ensure you are successful.
  - How will you maximize this experience? What are the other benefits than the funds raised?
    - Improved data and understanding of donors
    - Relationship building
    - Education of the mission
    - Engaging the next generation
    - Ownership of the vision