



EVERYTHING YOU NEED
TO KNOW ABOUT
*Staging a
Capital Campaign*

Fox Advancement

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Introduction

- **Overview of Capital Campaigns:** Define capital campaigns and discuss their importance in funding major organizational goals.
- **Who This Guide is For:** Non-profit leaders, fundraising teams, and board members looking to launch a successful campaign.
- **What Readers Will Gain:** Insight into the strategic steps, tools, and approaches for planning and executing a capital campaign effectively.

01



UNDERSTANDING CAPITAL CAMPAIGNS

WHAT IS A CAPITAL CAMPAIGN?

A capital campaign is like a big, focused fundraising effort for nonprofits and other organizations to bring in a large amount of money for a specific purpose. Think of it as an impetus to fund something really important, like building a new facility, renovating an existing one, starting a major program, or creating an endowment that supports the organization's future.



HOW IT WORKS:

Here's how it works: a capital campaign usually has two main phases. First, there's the **quiet phase**, where the organization works behind the scenes, talking with their closest supporters and key donors to secure major gifts. They try to raise a large chunk of the goal before even announcing it publicly. Once they've built up a good foundation of funds, they enter the **public phase**, where they announce the campaign to everyone and invite the broader community to pitch in to reach the final goal.



Unlike regular annual fundraising, which covers everyday needs and programs, a capital campaign is all about reaching a big, ambitious target for a major project. It's like rallying everyone's support to make a lasting impact that will strengthen the organization in the long term.



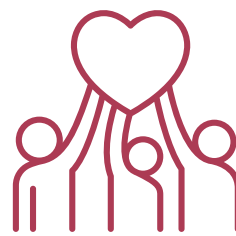
KEY SUCCESS FACTORS FOR CAPITAL CAMPAIGNS



Leadership



Timing



Community
Support



Long-term
Vision



LAYING THE GROUNDWORK

Laying the groundwork for a capital campaign starts with setting a strong foundation so every step forward is aligned with your organization's mission and vision.

VISION IMPACT ALIGNMENT (VIA)

At the core of this preparation is what we at Fox Advancement call **Vision Impact Alignment (VIA)**. This process helps clarify the purpose of your campaign and ensures that the project aligns with your organization's long-term vision and the impact you want to make. Essentially, it's about asking, "How does this campaign help us achieve our mission?" and ensuring every effort truly supports your goals.

The purpose of the VIA is to:

- Plan out a roadmap to gather the information necessary to develop a comprehensive report of your vision, the expected cost of execution so a goal can be set, and an assessment of your readiness to move forward;
- Create an initial budget that maps out where you are at today, and the required investment to achieve your goals;
- Implement readiness testing and recommendations on what supplemental resources you'll need to execute the journey.

VIA is essential to your success because you may conclude that you are not quite ready to proceed with your campaign.



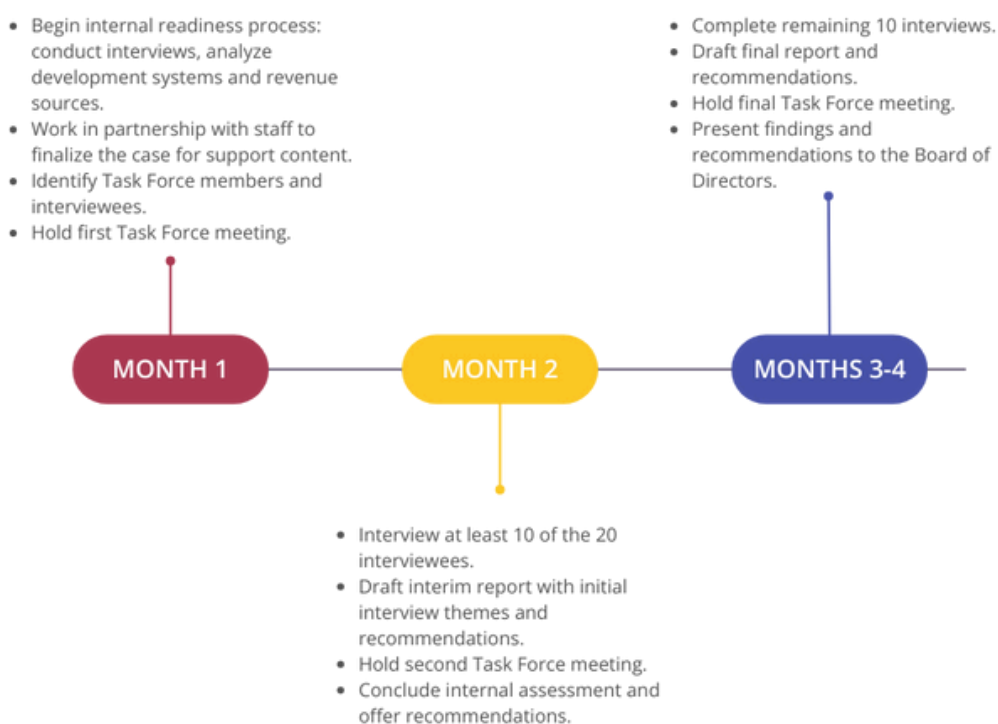
FEASIBILITY STUDY

Another crucial step is conducting a **Feasibility Study**. This study is like testing the waters to see if the campaign's goal is realistic and attainable.

A feasibility study is an essential step in the path to success for any campaign or major fundraising initiative. It allows you to have strategic conversations with your top individual donor and institutional funder prospects, gaining vital input from them about your proposed goals. The feasibility study is the ultimate risk management tool as it vets your vision with key stakeholders and begins to identify who will provide support to your campaign.

The aim is to identify the potential major donors and other financial commitments towards your fundraising goal during this process. In-depth study interviews also provide an opportunity to uncover planned gifts, identify employer matching opportunities, explore campaign leadership candidates, and access other vital information that will refine your case for support. Ultimately, the feasibility study allows you to move forward confidently with a fundraising goal that is informed by stakeholders.

Sample Feasibility Study Timeline



Together, **Vision Impact Alignment** and the **Feasibility Study** create a roadmap. They help you see what's possible, ensure that your project has a solid base of support, and confirm that your team is aligned around a common purpose. With this groundwork in place, your capital campaign is set up to inspire confidence and make a lasting impact.

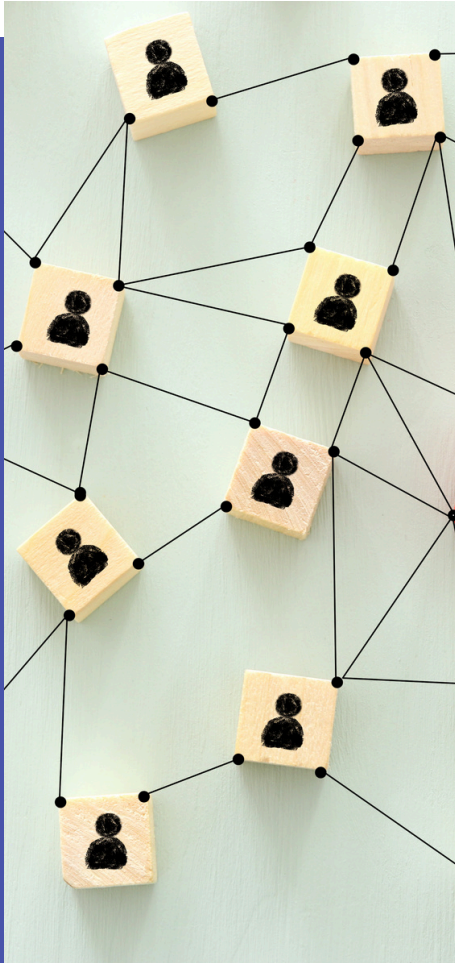


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ASSEMBLING YOUR CAMPAIGN TEAM

Assembling a strong team for your capital campaign is essential to keep everything organized, motivated, and on track. Here are some tips to help you build a capable and enthusiastic team:



7 TEAM BUILDING TIPS

- ✓ Identify Key Roles
- ✓ Consider External Support
- ✓ Encourage Collaboration & Communication
- ✓ Engage Your Network for Additional Support
- ✓ Define Clear Expectations & Goals
- ✓ Provide Training & Resources
- ✓ Foster Culture of Recognition



1. Identify Key Roles

- **Campaign Chair:** Choose a respected and influential leader who's passionate about your mission. The chair should be able to rally others and have a strong commitment to the campaign's success.
- **Board Members:** Engage board members who are well-connected and ready to champion the campaign. Their involvement signals credibility and can inspire confidence among potential donors. For more tips on engaging board members, read this post.
- **Internal Staff:** Designate key staff to oversee day-to-day activities, donor relations, communications, and budgeting. They keep the campaign moving smoothly, ensuring no details slip through the cracks.

2. Consider External Support

- **Consultants and Advisors:** Capital campaign consultants bring valuable expertise, especially if this is your first campaign. They can guide strategy, help with feasibility studies, and ensure best practices.
- **Volunteers:** Dedicated volunteers can bring added energy and support, especially during events and public outreach. Look for people who have a connection to your mission and are willing to give their time.

3. Encourage Collaboration and Communication

- Make sure each team member understands their specific role and how it fits into the campaign's bigger picture. Regular meetings and updates keep everyone aligned, engaged, and working toward the same goals.

4. Engage Your Network for Additional Support

- Ask team members to leverage their networks, whether by inviting potential donors to events or helping spread the word. Every connection can amplify the campaign's reach.

5. Define Clear Expectations and Goals

- Be upfront about the time commitment, responsibilities, and fundraising expectations. When everyone knows what's expected, they're more likely to stay committed and energized throughout the campaign.

6. Provide Training and Resources

- Even the most skilled team members can benefit from training. Consider workshops on donor engagement, fundraising techniques, or campaign software to help everyone feel prepared and confident.

7. Foster a Culture of Recognition

- Acknowledge team members' hard work and dedication along the way. Celebrating small wins and recognizing individual contributions keeps morale high and builds a sense of community.

By bringing together the right people and creating a culture of collaboration, you're building a team that can carry the campaign from planning to success. A well-assembled campaign team provides the foundation, energy, and momentum needed for a successful capital campaign.



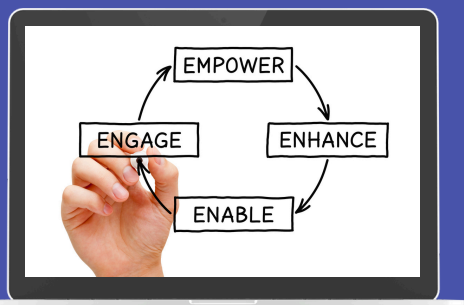
CRAFTING A COMPELLING CASE FOR SUPPORT

Case For Support

In this phase, the team develops a persuasive, inspiring “case for support” document that explains the need for the campaign, the specific project goals, and the long-term impact. This narrative is shared with donors to connect them emotionally to the campaign’s mission.

The foundation of a compelling case for support is three-fold:

- **Articulating Need:** How to connect your mission and the campaign to address a specific need.
- **Developing Key Messaging:** Creating emotional resonance and clarity in your messaging.
- **Leveraging Testimonials & Stories:** Real-life examples to reinforce the impact.



Why It's Important: The case for support is a central part of the campaign’s messaging and donor engagement strategy. A well-crafted case explains why the campaign matters, builds emotional resonance, and drives donor action.

Keep in mind: The case for support is a living document. You will continue to refine it throughout the campaign process as you learn more about your potential donor’s preferences.



PLANNING THE PHASES OF THE CAMPAIGN

05





3 Phases of the Capital Campaign

There are three phases of the campaign—the quiet phase, the public phase, and the post-campaign phase. We'll go into more detail about best practices for Capital Campaign Implementation in Part Two of our eBook.

1

The Quiet Phase

In the **Quiet Phase**, the campaign team outlines the quiet phase strategy, aiming to secure a significant percentage of the goal from major donors before launching publicly

2

The Public Phase

The **Public Phase** of a capital campaign is when the campaign goes from a behind-the-scenes effort to a full public launch, inviting the broader community to participate and help reach the fundraising goal.

3

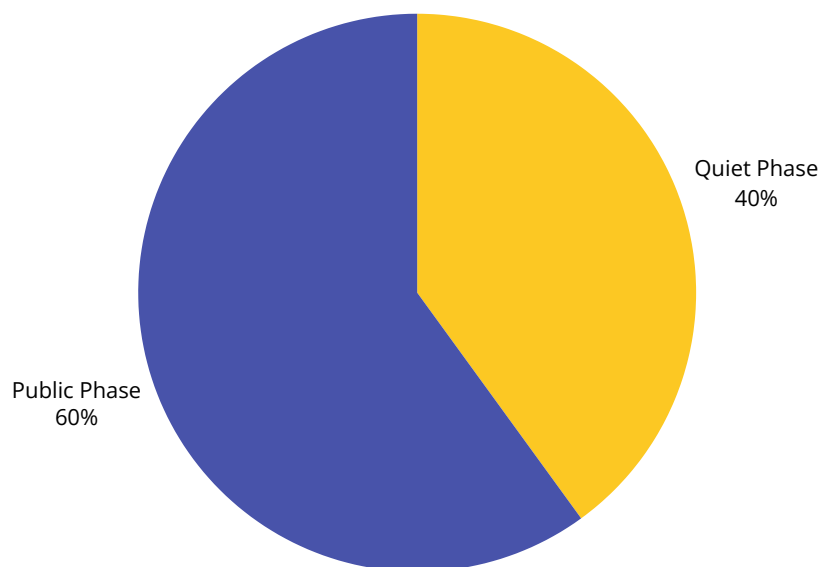
Post-Campaign Phase

The **Post-Campaign Phase** is essential for ensuring that the momentum, relationships, and commitments established during the campaign are maintained, and that the project or initiative funded by the campaign is successfully completed and managed.

The Quiet Phase

In the **Quiet Phase**, the campaign team outlines the quiet phase strategy, aiming to secure a significant percentage of the goal from major donors before launching publicly (For reference, at Fox Advancement, we recommend **~40%** to our partners). Planning for this phase includes setting specific targets, assigning donor prospects, and organizing private events to build momentum.

% of Goal Raised



The Quiet Phase incorporates your Feasibility Study, building your campaign team, building your case for support and importantly, refining your campaign messaging based on donor feedback.

Why It's Important: The quiet phase strategy is all about relationship-building, securing large early gifts, and refining the campaign's approach. With a solid foundation of lead gifts and strategic momentum, the campaign is well-prepared for a successful transition to the public phase.

The Public Phase

The **Public Phase** of a capital campaign is when the campaign goes from a behind-the-scenes effort to a full public launch, inviting the broader community to participate and help reach the fundraising goal. By this stage, the campaign has ideally raised a significant portion of the funds through the quiet phase, where lead gifts from major donors were secured. Now, with a strong financial foundation and momentum, the organization opens up the campaign to everyone, creating an exciting, inclusive opportunity for community members to contribute.

The public phase is all about rallying the community and creating excitement around a shared mission. It's a celebration of the campaign's progress, an invitation for everyone to participate, and a crucial step in building broad-based support that sustains the organization's mission well beyond the campaign itself.

6 things that typically happen in the Public Phase:

6 Critical Moments in the Public Phase of a Capital Campaign

- 1 Public Announcement & Kickoff Event
- 2 Expanded Outreach & Marketing
- 3 Engaging the Broader Donor Base
- 4 Special Events & Campaign Milestones
- 5 Progress Updates & Donor Recognition
- 6 The Final Push to Reach Goal

1. Public Announcement and Kickoff Event

The campaign is publicly announced with a kickoff event or press release to formally introduce the campaign to the wider community. The announcement highlights the campaign's purpose, the funds raised so far, and the specific impact the campaign will make.

WHY IT MATTERS

This announcement builds excitement and sets the stage for widespread participation. It celebrates early successes and creates a sense of urgency to reach the remaining goal.

2. Expanded Outreach and Marketing

During this phase, marketing and communication efforts ramp up. This can include social media campaigns, email newsletters, direct mail, community events, and press coverage. Campaign messaging focuses on the collective impact of the project, making it easy for people to see how they can contribute to the success.

WHY IT MATTERS

Broad outreach helps raise awareness and reach donors of all levels, inviting new supporters to get involved and rallying the community around a shared vision.

3. Engaging the Broader Donor Base

The public phase opens up donation opportunities to the broader public, including community members, small business owners, alumni, and anyone connected to the organization's mission. Giving levels are often structured to accommodate gifts of all sizes, making it easy for everyone to contribute.

WHY IT MATTERS

By inviting gifts at every level, the campaign builds a larger donor base, fosters inclusivity, and allows more people to participate, which can increase community investment in the organization's success.

4. Special Events and Campaign Milestones

Organizations often host events, like open houses, community tours, or donor recognition events, during the public phase to keep up the momentum and thank supporters. These events highlight campaign milestones and provide ongoing updates.

WHY IT MATTERS

Events and updates create opportunities to maintain engagement and encourage additional gifts. They also serve as moments to celebrate the campaign's progress and build enthusiasm as the campaign nears its goal.

5. Progress Updates and Donor Recognition

Regular updates are shared across multiple channels to keep the community informed of progress. Donor recognition efforts (like "thank you" shout-outs or donor walls) are often a big focus here to celebrate contributions and inspire others to give.

WHY IT MATTERS

Frequent updates build momentum, show transparency, and motivate others to contribute, especially when they see community members they know supporting the campaign.

6. The Final Push to Reach the Goal

As the campaign nears its goal, there's often a final push to cross the finish line. This might involve countdown campaigns, last-chance opportunities, or matching gift challenges that encourage donors to help close the gap.

WHY IT MATTERS

The final push creates urgency and a sense of accomplishment. Donors feel they're part of something meaningful as they help bring the campaign to a successful close.

The **Post-Campaign Phase** in a capital campaign refers to the period that follows the conclusion of the fundraising effort. This phase is essential for ensuring that the momentum, relationships, and commitments established during the campaign are maintained, and that the project or initiative funded by the campaign is successfully completed and managed. It involves several critical activities:

7 Post-Campaign Phase Activities

1. Acknowledging & Stewarding Donors

Thank You and Recognition: A formal process of thanking donors for their contributions is crucial. This can include personalized thank-you notes, public recognition in materials or events, and naming opportunities (e.g., plaques or donor walls).

Building Relationships: After the campaign, maintaining ongoing communication with donors is key. This may involve regular updates on the progress of the project, the impact of their gifts, and opportunities for further involvement.

Tax Receipts and Legal Documents: Ensure that donors receive all necessary legal documentation, such as tax receipts or acknowledgments of donations.

2. Reporting & Transparency

Campaign Results: Share a comprehensive report detailing the outcomes of the campaign, including the total amount raised, the donors who contributed, and how funds are being used.

Publicity: Publicize the success of the campaign through press releases, newsletters, and social media. This serves to recognize the collective effort and reinforce the organization's credibility.

3. Implementing the Funded Project

- **Project Execution:** In the case of a capital campaign for building or renovating physical structures, this phase involves the actual construction or implementation of the project, ensuring that the funds are being used effectively.
- **Timelines and Budget Management:** Monitor the project's progress, adhering to timelines and budgets. Communicate any delays or changes with stakeholders.
- **Addressing Expectations:** If there were specific expectations set during the campaign (e.g., completion of a new building or facility), ensure that those expectations are met or updated as needed.

4. Reporting & Transparency

- **Assessment of Goals:** Evaluate whether the campaign met its financial and non-financial objectives, such as building community support or engaging new stakeholders.
- **Lessons Learned:** Review the strategies that worked and those that did not, helping to improve future fundraising efforts.
- **Impact Measurement:** Track and measure the outcomes of the project or program funded by the campaign, to demonstrate the impact of the contributions to both donors and the broader community.

5. Long-term Engagement & Legacy Building

- **Sustaining Donor Relationships:** Ongoing engagement with donors is important for future campaigns or regular giving programs. This might include creating a donor stewardship plan to ensure that relationships are maintained.
- **Creating a Legacy:** If appropriate, create a long-term recognition system or events that honor the campaign's donors, ensuring their place in the organization's history.

6. Internal Reflection & Team Recognition

- **Celebrating Successes:** Internally, it's important to celebrate the campaign's success with the fundraising team, board members, volunteers, and any other stakeholders involved. This helps build morale and encourages future efforts.
- **Acknowledging the Effort:** Recognize the hard work and contributions of the team members involved in the campaign, whether they were part of the leadership, major gifts, or other key roles.

7. Re-engaging for Future Campaigns

- The post-campaign phase is also an opportunity to lay the groundwork for future fundraising initiatives. Often, organizations will leverage the relationships built during a successful capital campaign to kick off annual fund drives, major gifts, or even new campaigns.

the post-campaign phase is about ensuring the success of the project funded by the campaign, maintaining strong donor relationships, and setting up the organization for continued growth and engagement.

CONCLUSION

With strong planning and the right tools, your organization can lay the groundwork for a successful capital campaign. For expert guidance in **Vision Impact Alignment**, **Feasibility Studies**, and **Campaign Implementation**, reach out to [Fox Advancement](https://www.foxadvancement.com), a consulting firm specializing in capital campaigns.

Stay tuned for Part Two, "Capital Campaign Implementation Best Practices," which will go into detail about campaign execution.

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About Fox Advancement: Fox Advancement, based in Minneapolis, Minnesota, partners with non-profits across the country. With over 25 years of experience, **95% of our capital campaign clients have successfully met or exceeded their fundraising goals.**