

## Outline for Planning a Capital Campaign

### What is a parish capital fundraising campaign?

Any parish effort to increase annual offertory income in pledges payable for up to 5 years for construction, renovations or restoration, debt reduction or retirement, or to create a restricted/unrestricted endowment or investment reserve fund. The parish capital campaign would raise funds over and above annual offertory giving, the Archdiocesan Annual Appeal and any special collections conducted throughout the Archdiocese.

Parish finance council must seek and receive written approval from the Archbishop to embark on a capital campaign. Parishes are encouraged to consider timing of campaign launch dates with their commitment to the Archdiocesan Annual Appeal campaign each September – December.

### Step 1: The “Quiet” Phase

#### Assign Person to be In-Charge

This can be either a hired consultant or a volunteer. Development Office can assist with developing role, reviewing RFPs, supporting or mentoring volunteer leader

#### Assemble volunteer campaign committee

Development Office can assist with developing role descriptions, reviewing volunteer confidentiality agreements

#### Develop the Project Scope

Define the overall campaign goal, identify particular needs within the campaign, obtain architectural drawings and/or necessary quotations from builders/contractors, define the campaign time-line: launch of public phase, campaign closing, construction/renovation start date

#### Develop a contingency plan

What happens if campaign doesn't meet goal? Financing, delay, extension, cancellation? Will donations be returned or re-directed?

#### Develop a fundraising budget

It costs money to raise money – even the Canada Revenue Agency warns against charities that claim \$0 in fundraising expenses annually! Will you be sending a letter? Running a telethon? Reimbursing volunteers for mileage? Hosting a special event? Purchasing advertising?

#### Develop a case for support and marketing plan

Why should people give to/invest in this project? Why is it important? This should look a lot like any business proposal seeking funding from investors. How will it be communicated and conveyed? Brochure/Video/letters? Marketing approach for major gifts, smaller donations, planned giving?

#### Develop a chart of standards and a prospect list

Break the goal down to show the number of gifts at what value will be needed to meet campaign goal. Create a list of constituencies that will be approached – ie. businesses, parishioners, local foundations. Are there heritage or community grants that you might be able to apply for? Create a list of individual prospects that will be approached for major donations. Begin to assemble a research file on these individuals – why would they be good candidates for a donation? Who is connected to them and can help to make an introduction?

#### Develop gift recognition policies

Will there be “naming opportunities” or “gift clubs or circles” for donors of certain amounts? Will all donors be recognized equally? Will the building include a place to recognize and/or acknowledge donors? How will donors be thanked?

#### Develop Pledge Form and Financial Administration

Create pledge form and have approved by the Archdiocesan Development Office. Determine how charitable donation receipts will be issued and records kept to track donors and separate funds from ordinary collections.

#### The “early” asking

Solicit financial commitment from leaders/volunteers/committee members. Approach those who are current major supporters of community – thank them and enquire about their interest in participating in this project. Begin to solicit leadership giving support from others in community who are close to project. Ask them to help identify others who they would like to help introduce to the project.

### **Step 2: The Public Launch**

Announce the campaign, goal and timeline to identified constituencies and the general public.

This can be through parish bulletins, preaching, media exposure, local group presentations.

#### Conduct appeals

This could include a direct-mail appeal with telephone follow-up. This could be a special in-pew collection. This will include the work of making face-to-face asks for funding from individuals.

Development Office can assist with reviewing appeal material/plans and with accompanying volunteers on individual solicitations of \$10,000 or more.

Keep the momentum going

What will be used to keep people up-to-date on progress and keep the momentum going? Can you offer special events like VIP cathedral tours to show individuals what is happening, what is needed and perhaps go over the history and features of the building? Will there be a thermometer or updates regularly from the committee. Will you be in touch by mail with individuals who have already donated to let them know of the on-going status?

### **Step 3: Campaign Closing and Celebration**

Announce the campaign closing and results publically

Break ground and/or begin construction/renovation

Launch a thank-you campaign

Execute any donor recognition and/or acknowledgement that was planned in the quiet phase.

Release results and information and updates to the media

Perhaps plan a special event to thank the community for their support and celebrate the success.

Invite contributors to consider a legacy gift to maintain the good accomplishment for future generations.

*A note about golf tournaments and galas...*

These special-event fundraisers are often one of the first places that committees look when launching a fundraising campaign. The truth is that the relative financial yields on these events when compared to the intense volunteer and staff effort involved in executing them rarely make sense as pure fundraising avenues. They can be useful for building awareness about a campaign, but rarely are they used effectively to that end by organizations – attendees are rarely connected directly with the cause/mission of the charity and they are rarely contacted or solicited after the event. They also often require a commitment of capital prior to the event to secure venue space or catering as well as the additional advertising costs that can be risky for a smaller organization. Most successful events are well-established and will be able to cite early years in their own development that were money-losers or did not deliver large profits. If special events are something that you are committed to exploring as a strategy, please be in touch with the Development Office to discuss some ways to make sure that you will be able to get as much value as possible from such an endeavor.