1. Four Phases of a Capital Campaign
   a. Pre-Campaign Study
   b. Quiet/Leadership Phase
   c. Public Campaign
   d. Campaign Maintenance

2. Pre-Campaign Study Objectives
   a. Internal and External Research
   b. Image – How does your community/constituency view your organization?
   c. Donor Buy-In – Do donors believe in your proposed campaign?
   d. Volunteers – How many campaign volunteers can be identified?
   e. Goal – Is the campaign goal attainable?
   f. Timing – Is the campaign timing favorable?
   g. Leadership – Are the stakeholders ready to lead, give and work?
   h. Readiness – Does the staff have the skill, time and commitment to launch a successful campaign.

3. Pre-Campaign Process
   a. Wealth Engine – To identify any hidden donors.
   b. PERT Chart – The timeline.
   c. Case Statement Development
   d. Questionnaire Development
   e. Key Questions
      i. Would you consider contributing to this campaign over the next 3 years, over and above your current giving?
      ii. Please ESTIMATE the amount you MIGHT consider contributing.
      iii. Would you serve as a volunteer?
   f. Interviews
      i. Personal
      ii. Telephone
iii. Mail
iv. Online

4. **Pre-Campaign Study Results**
   a. **Weak Support** – You may need to revisit your strategic plan and spend time identifying and cultivating major donors.
      i. Low Interest in the Case
      ii. Few Major Donors Identified
      iii. Few Campaign Volunteers Identified
      iv. Minimal Board Involvement
   b. **Moderate Support** – You made need to phase your project and extend your quiet phase to identify and cultivate more major donors.
      i. Moderate Interest in the Case
      ii. Some Major Donors Identified
      iii. Some Campaign Volunteers Identified
      iv. Some Board Involvement
   c. **Strong Support** – Full Speed Ahead!!!
      i. Strong Interest in the Case
      ii. Several Major Donors Identified
      iii. Several Campaign Volunteers Identified
      iv. Strong Board Involvement

5. **Major Donors are the Key to Every Successful Campaign.**
   a. **Build at the Speed of Money!**
   b. **Create a Gift Chart** – It’s not 80/20, 97% of your gifts will come from 3% of your donors.
   c. **Recruit Volunteers.**
   d. **Name Storm your major donor prospects.**