

## SECRETS OF A HIGHLY SUCCESSFUL CAPITAL CAMPAIGN

PRESENTER: PAT MCLAUGHLIN, PRESIDENT — THE TIMOTHY GROUP

**Overview:** The highest stress and ultimate test of a strong advancement program is to successfully lead a major capital campaign. What are the essential elements of this process and what have veteran leaders learned about the secrets of success? Consider prudent lessons and insights from a distinguished leader of many campaigns.

8:00 – 8:15

**Welcome & Instructions**

8:15 – 9:30

### SESSION 1 — CONDUCTING A PRE-CAMPAIGN AUDIT TO KNOW WHEN YOU'RE READY

**Overview:** Look before you leap. Review an essential check list of elements that should be considered before launching a capital campaign. Making sure your house is in order and that you're prepared to successfully launch this major effort.

- ▶ Leadership issues to be assessed and addressed
- ▶ Alignment and agreement within institutional planning
- ▶ Measuring effectiveness of annual fund management
- ▶ Review of relevant external issues

9:30 – 10:15

**Refreshment Break — Regency Foyer**

10:15 – 11:45

### SESSION 2 — TESTING THE CAMPAIGN THROUGH A FEASIBILITY STUDY

**Overview:** Major campaigns test the strength of their plan through a well-executed feasibility study. The findings will confirm the appeal of the campaign goals and the likely results of fundraising. How is this conducted and what are the results you should expect?

- ▶ Creating and crafting a strong case statement
- ▶ Selecting the right team for feasibility interviews
- ▶ Assessing the results – implications for success
- ▶ Weaving the findings into the campaign plan

12:00 – 1:00

**Buffet Lunch — Regency Foyer**

1:00 – 2:15

### SESSION 3 — GETTING ORGANIZED FOR SUCCESS

**Overview:** Now it's time to get each of the essential pieces of the campaign puzzle in order and arranged for maximum campaign results. What does this picture look like?

- ▶ Creating and crafting a strong case statement
- ▶ Setting the campaign gifts table
- ▶ Recruiting/hiring campaign leadership – voluntary and paid
- ▶ Confirming the right campaign timeline

2:15 – 3:00

**Refreshment Break — Regency Foyer**

3:00 – 4:15

### SESSION 4 — HIGHLY SUCCESSFUL CAMPAIGN EXECUTION

**Overview:** Talk is cheap. And hard work is just that. After planning the work, working the plan is the path to success. Review the key signposts on the journey of a highly successful campaign.

- ▶ Conducting major donor screenings and making solicitation assignments
- ▶ Launching the quiet phase with top donor solicitations – key asks
- ▶ Going public – when and how to push all levels of the campaign
- ▶ Donor appreciation, recognition, and campaign reporting

4:15 – 4:30

**Wrap Up**

6:00 – 8:30

**CONNECTIONS DINNER — SAK COMEDY LAB — *Sponsored by Columbia International University***  
Ballroom B/C/D