Capital campaigns are not primarily fundraising projects. Capital campaigns are organizational growth projects.

The first question when considering any capital campaign should be: how does this fit within our long-term strategic plan and vision?

Capital campaigns are a tangible expression of an expanded vision for the future of an organization.

Your board, foundations, partners, and donors will want to understand how a new or expanded facility meets the goals of your organization – how it will increase your impact.

A Community-Centered Vision

You need to frame your project around a compelling vision for the future. Your vision needs to be community-centered, not organization-centered.

What does the community need? And how will this project meet community needs?

Capital Campaigns

Are project management masterpieces

Raise your organization’s community visibility

Accelerate donor engagement

Build the long-term fundraising capacity of organizations
3 Interconnected Planning Elements
Capital campaigns consist of three interconnected planning elements

Project Planning
- Your Vision
- Community Need
- Goals + Impact
- Space Requirements

Business Planning
- Sources + Uses
- Business Model
- Financing Strategy
- Pro Forma Analysis

Fundraising Planning
- Key Messages + Case for Support
- Campaign Volunteer Leadership
- Prospecting + Feasibility + Fundraising
- Long-term Fundraising Capacity Building

Each element seeks to answer key questions to move your project forward

Project Planning
- How does this project fit within our long-term strategic plan and vision?
- What does the community need?
- What impact are we seeking to make?
- What are the core objectives for this campaign?
- What long-term program goals do we have and what spaces will we need?
- How much and what kind of space(s) do we need?

Business Planning
- How will we fund this project?
- What sources of revenue will we use?
- How much of this project will we finance long-term?
- What non-philanthropic revenue can we access?
- Which sources of funds map to which aspects of the project?
- How much will short-term bridge financing cost?
- How much, on top of direct project costs, will running this campaign cost?
- What is our financial model for sustainably operating post-campaign?

Fundraising Planning
- How much money can be raised from philanthropic sources for this project?
- Which individuals, foundations and corporations are the best donor prospects?
- Which volunteer leaders will champion this project?
- What messages will resonate with donors and the community?
- How can we use this campaign to grow our annual fundraising?
Working Groups for Each Element

A capital campaign is a powerful volunteer engagement tool

You will need a variety of volunteer working groups to move your campaign planning forward. These work groups include key organizational staff, board members and community volunteers with special expertise. Each work group should also have professional advisors involved (architects, campaign consultants, financial partners, etc).

Project Planning
- Core Committee
- Community Engagement Work Group

Business Planning
- Finance + Budgeting Work Group
- Construction Work Group

Fundraising Planning
- Donor Engagement Work Group
- Board Campaign Work Group
- Feasibility Work Group
- Campaign Committee

An Iterative, Non-Linear Planning Process

The vision that you develop might exceed your available resources as you dive deeper into your planning process. What you discover as you move along the planning journey informs your project scope and often requires you to adjust your plans.

You start with a working goal that aligns with your desired project which you adjust as you gather more information on what is possible.

This is why you never share your working goal publicly, and you wait to announce your campaign to the public. When you announce your campaign to the public the scope and financial goal is finalized — and you’ve raised the majority of the money.
# How the Planning Elements Work Together

Every project is unique but this is a general outline that all campaigns follow.

## Step 1 Determine Needs & Options

### Step 2A Organizational Readiness
- Review strategic plan
- Assess organizational capacity
- Budget for planning

### Step 2B Fundraising Planning
- Assess staffing, systems, technology
- Screen donor + foundation prospects
- Engage lead donors

## Step 3A Project Planning

### Step 3B Fundraising Planning
- Consider a feasibility study
- Set a campaign goal + budget
- Identify campaign leadership
- Prepare a case for support
- Develop a campaign plan
- Begin major gift solicitation

## Step 4 Board Approval of Campaign & Project

## Step 5A Project Design

### Step 5B Fundraising Planning
- Establish campaign management
- Continue silent or major gift phase
- Finalize financing plan
- Set financial campaign goal
- Launch public phase of campaign

## Step 6A Construction + Beyond

### Step 6B Fundraising Planning
- 100% of funds raised
- Ground breaking
- Ribbon cutting
- Donor stewardship

*inspired by the Facility Expansion & Renovation Planning resource from the Gates Family Foundation*
Breakout of the 3 Planning Components

Project Planning
- Define long-term programmatic goals
- Outline campaign objectives
- Engage architecture and project visioning partners
- Community-centered visioning
- Quantify space requirements
- Engage owners representative

Business Planning
- Identify non-philanthropic revenue sources
- Develop pro forma for post-campaign
- Develop budget for campaign, including soft costs + campaign costs
- Develop business plan for project
- Develop working goal for project
- Engage financing partners
- Engage construction partners
- Finalize campaign goal

Fundraising Planning
- Engage capital campaign consulting partner
- Assess current fundraising capacity
- Engage lead donor prospects
- Screen donor + foundation lits for best prospects
- Develop project case + messaging
- Develop campaign volunteer leaders
- Execute feasibility study to test working goal
- Raise board, lead and major gifts
- Announce campaign to public
- Community fundraising phase
Your Fundraising can't get ahead of your project planning.

But Don’t Wait to Move Your Fundraising Forward

While it's true that your fundraising can't get ahead of your project planning, you also don’t want to wait until you have your project vision defined to engage your key donors and start moving the fundraising aspect of the campaign forward.

We call the fundraising work that happens while your project and business planning is being developed the Campaign Advancement phase. Involving your top donors in this process will ensure that they are literally invested in the project from the beginning.
## Capital Campaign Timeline

All campaigns generally follow this framework regardless of size and scope.

### PHASE 1
**Project + Business Planning**
- Campaign Advancement
- Milestones Achieved:
  - Project needs assessment completed
  - Non-philanthropic revenue options identified
  - Financing options identified
  - Key case messages outlined
- Activities:
  - Secure early seed fund commitments from most loyal supporters to fund campaign soft costs
  - Identify needs for additional development staff and contractors + hire
  - Identify development technology, systems and policies needed for campaign
  - Screen constituent databases to identify best prospects + conduct prospect research
  - Engage + inform foundation program officers
  - Engage + inform lead and major donor prospects
  - Strengthen annual and major gift programs
  - Recruit and engage campaign and Work Group leaders
  - Launch Major Gifts Committee/Program
  - Create draft Case for Support and key messages
  - Outline initial campaign timeline and create campaign policies

### PHASE 2
**Feasibility Study + Scope Assessment**
- Milestones Achieved:
  - Identify top lead donors
  - Answer core questions around how much money can likely be raised from individuals and foundations, and which ones
  - Project scope adjusted based on additional information
  - Case messaging refined based on feedback
- Activities:
  - Conduct feasibility interviews
  - Gather feedback on case and project
  - Align project scope and vision with available resources
  - Develop a working goal for the campaign

### PHASE 3
**Board Gifts**
- Milestones Achieved:
  - 100% board campaign gifts secured
- Activities:
  - Identify and train feasibility study group participants
  - Conduct feasibility interviews
  - Gather feedback on case and project
  - Align project scope and vision with available resources
  - Develop a working goal for the campaign

### PHASE 4
**Lead + Major Gifts**
- Milestones Achieved:
  - 70-80% of campaign fundraising goal secured
- Activities:
  - Solicit lead and major gifts
  - Solicit foundations (after 50% goal secured)
  - Determine final campaign goal and timeline
  - Plan for community phase
  - Secure challenge grants for community phase
  - Continue growing annual and major gift programs

### PHASE 5
**Community Campaign + Construction**
- Milestones Achieved:
  - Final public campaign goal and timeline decided
  - Comprehensive marketing and donor acquisition program is in place and running
  - Final % of campaign fundraising goal secured
- Activities:
  - Solicit lead and major gifts
  - Solicit foundations (after 50% goal secured)
  - Determine final campaign goal and timeline
  - Plan for community phase
  - Secure challenge grants for community phase
  - Continue growing annual and major gift programs

### PHASE 5
**Dedication + Celebration**
- Milestones Achieved:
  - 100% of fundraising goal achieved
- Activities:
  - Project is complete and occupied
  - 100% of fundraising goal achieved
  - Project is complete and occupied

### Capital Campaign Timeline

<table>
<thead>
<tr>
<th>Phase Length</th>
<th>Silent Phase</th>
<th>Public Phase</th>
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<tbody>
<tr>
<td>1-5 years</td>
<td>6 months</td>
<td>1-2 years</td>
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<tr>
<td>6-9 months</td>
<td>1-2 years</td>
<td>3 months</td>
</tr>
<tr>
<td>6 months</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Milestones Achieved**
- Project needs assessment completed
- Non-philanthropic revenue options identified
- Financing options identified
- Key case messages outlined
- Identify top lead donors
- Answer core questions around how much money can likely be raised from individuals and foundations, and which ones
- Project scope adjusted based on additional information
- Case messaging refined based on feedback
- 100% board campaign gifts secured
- 70-80% of campaign fundraising goal secured
- Final public campaign goal and timeline decided
- Comprehensive marketing and donor acquisition program is in place and running
- Final % of campaign fundraising goal secured
- 100% of fundraising goal achieved
- Project is complete and occupied

**Activities**
- Secure early seed fund commitments from most loyal supporters to fund campaign soft costs
- Identify needs for additional development staff and contractors + hire
- Identify development technology, systems and policies needed for campaign
- Screen constituent databases to identify best prospects + conduct prospect research
- Engage + inform foundation program officers
- Engage + inform lead and major donor prospects
- Strengthen annual and major gift programs
- Recruit and engage campaign and Work Group leaders
- Launch Major Gifts Committee/Program
- Create draft Case for Support and key messages
- Outline initial campaign timeline and create campaign policies
- Identify and train feasibility study group participants
- Conduct feasibility interviews
- Gather feedback on case and project
- Align project scope and vision with available resources
- Develop a working goal for the campaign
- Project scope and financing clarified
- Case and campaign materials created
- Conduct board giving campaign
- Launch Campaign Committee
- Cultivate and engage lead and major donors
- Continue growing annual fund and major gift programs
- Continue to engage foundation program officers
- Continue to engage + inform lead and major donor prospects
- Solicit lead and major gifts
- Solicit foundations (after 50% goal secured)
- Determine final campaign goal and timeline
- Plan for community phase
- Secure challenge grants for community phase
- Continue growing annual and major gift programs
- Solicit lead and major gifts
- Solicit foundations (after 50% goal secured)
- Determine final campaign goal and timeline
- Plan for community phase
- Secure challenge grants for community phase
- Continue growing annual and major gift programs
- Public announcement of campaign
- Ground breaking ceremony
- Ramp-up communications inviting all to participate
- Challenge grant for final fundraising push announced
- Continue building robust annual, major and planned giving programs
- Ribbon cutting and opening celebration
- Donors and volunteers recognized
- Donor stewardship efforts underway
- Final % of campaign fundraising goal secured
- 100% of fundraising goal achieved
- Project is complete and occupied

All campaigns generally follow this framework regardless of size and scope.
Building stronger nonprofits is our superpower.

The Varga Group consultants are trusted advisors, coaches and strategists to high-performing, high impact organizations and their leaders.

What makes us different?

When you work with The Varga Group, you can expect the same comprehensive services a large firm delivers – combined with the personal commitment, real collaboration and customized solutions of a boutique agency. We dig in deep and address your unique challenges with creative thinking and customized strategies.

We are capital campaigns experts.

The Varga Group is a management consulting firm specializing in capital campaigns, fundraising training, board development, retreat facilitation, and leadership Coaching.
Our Clients

**Capital Campaign Counsel**
- Camp Fire Columbia
- De La Salle North Catholic High School
- Friendly House, Inc.
- Hands On Children’s Museum
- Latino Network
- Northwest Housing Alternatives
- NW Children’s Theater & School
- Portland Community College
- Social Venture Partners Portland
- The Dougy Center
- University of Oregon Foundation
- Willamette Falls Legacy Project

**Fundraising Capacity Building**
- 1,000 Friends of Oregon
- Big City Mountaineers
- Candlelighters for Children with Cancer
- Community Warehouse
- Dress for Success Oregon
- MercyCorps
- National Wildlife Federation
- New City Initiative
- Our House
- Northwest Outward Bound School
- Planned Parenthood Columbia Willamette
- Portland State University Foundation
- Relay Resources
- Salem Art Association
- United Way of the Columbia Willamette
- Willamette Humane Society
- Write Around Portland

**Organizational Development**
- Clatsop Community Action
- Elders in Action
- Friends of the Children Portland
- Innovative Housing
- MESA Oregon
- New City Initiative
- Oregon Public Radio
- World Muse

**Board Development/Training**
- Albina Community Bank
- Beaverton Arts Foundation
- Camp Fire Columbia
- Clark County Volunteer Lawyers Program
- Clatsop Community Action
- Community Warehouse
- Cowlitz-Wahkiakum Legal Aid
- DoveLewis
- Elders in Action
- Foundation for Excellence in Mental Health Care
- Global ADE
- Hands On Children’s Museum
- Make-A-Wish Oregon
- MESA Oregon
- National Association of Social Workers
- NIRSA Foundation
- Oregon Center for Nursing
- PeaceHealth Foundation
- Planned Parenthood Columbia Willamette
- Portland Community College
- Portland State University Foundation
- Portland Trail Blazers Foundation
- Southwest Washington Police Activities League
- Willamette Humane Society

**Executive/Leadership Coaching**
- Oregon Food Bank
- 1,000 Friends of Oregon
- Beaverton Arts Foundation
- De La Salle North Catholic High School
- EcoChallenge
- Friendly House, Inc.
- Friends of the Children Portland
- Kairos PDX
- Planned Parenthood Columbia Willamette
- Open School
- Portland State University Foundation
- Reed College
- United Way of the Columbia Willamette
- Youth Progress
About The Varga Group

The Varga Group is a management consulting firm specializing in capital campaigns, fundraising training, retreat facilitation, board development and leadership coaching.

Since 2013, we’ve worked with over 60 higher education institutions, independent schools and nonprofits to grow their fundraising, train their board, coach their leaders and successfully navigate their capital and comprehensive campaigns.

We have helped our clients raise more than $90M since 2013.

Our team is based in Portland, Oregon and we work with clients nationwide.

The Varga Group is proud to be a woman-owned business.

thevargagroup.com

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