



# Ready or Not, Here it Comes: Assessing Organizational Readiness for a Capital Campaign

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Presented By: Mary Sumners, Kennari Consulting  
Friday, July 16, 2021 | 9:00 – 10:00 a.m.



# A little housekeeping...



*We're recording this webinar!*

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!



*Feel free to ask questions!*

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# Today's Speaker



## Mary Sumners | Vice President of Annual Giving, Kennari Consulting

Mary's areas of expertise include annual giving strategies, capital campaign management, and board and volunteer committee support. Mary has tremendous knowledge on managing the day-to-day challenges of fundraising and enjoys facilitating the decision-making process with clients. She is especially passionate about helping boards become more inclusive and intentional in representing the communities they serve. She is also BoardSource certified, which has given her greater insight into how nonprofit boards can best support their organizations.

# Overview

- + Is your organization ready for a capital campaign?
- + Checklist of items to help identify the tasks necessary to ensure a successful campaign



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# Campaign Readiness



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# Clearly Defined Project

- Are all the elements determined and defined?
- Does the project have:
  - Clear Alignment with Strategic Plan
  - Programming/Capacity Building Components
  - Endowment Portion and Use
  - Measurable Outcomes/Impact on Community



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# Budget

A Complete Budget Includes:

- Pre-campaign Planning Costs
- Construction, renovation and contingency costs
- Campaign costs (including materials and donor recognition signage)
- Programming/Capacity Building Costs
- Timeline for cash flow
- Pro Forma
- Business Plan



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# Case for Support

- Clear, Urgent, Compelling
- Shows alignment to the strategic plan
- Moves the needle on an issue for the end user and community
- Shows that the organization is capable of achieving the goal and completing the project
- Includes all facets of the project, defines the need for each, they are all related to a common theme



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# Leadership

- Organizational leadership, the Board, CEO, and top management, agree with and need and case for support.
- Leadership is prepared for the intensive involvement that is necessary for campaign success.
- Leadership is personally motivated to meet the goal, support the volunteers, and keep focused on the most important part of a campaign: asking for gifts.



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# Prospective Donors

- Major Gift Prospects are Identified, Cultivated, Engaged
- Prospective Donors are Identified at all Levels of the Gift Chart
- Lead Gift Potential at 10-20% of Goal
- Connectivity, Accessibility to New Donors



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# Volunteers

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- Diverse Network of Volunteers Available
- Honorary and Working Leadership
- Board Representation within the Cabinet Prospect and/or Leadership List
- Volunteers at all Capacity Levels, with Demonstrated Success
- Staff Support for Volunteers

# A History of Support

- History of Successful Capital Campaigns
- Multiple Years of Strong Annual Giving
- Strong and Accurate Donor Records
- Indicators of Growth Potential



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# Staffing

- Knowledgeable and Experienced Staff Members and/or Outside Consultants
- Staff Capacity Appropriate for Annual and Capital Goals
- Staff Capacity for Supporting Volunteer Cabinet Needs



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# Records and Research

- Appropriate Donor Management System for Campaign and Beyond
- Clean Records and Data
- Accurate Information about Prospects and Research Capability for Cabinet and Staff Fundraising Work
- System for Volunteer Assignments, Pledge Payments, Gift Acknowledgements, and Reporting?
- Staff Oversight and Management Responsibility



# Motivation

- Motivated CEO/President/Executive Director and Director of Development to Prioritize Campaign Work
- Board Focus on Ensuring Resources and Infrastructure, Personal Commitment to Success



# Score Your Organization's Readiness!

To get a free scoring tool using today's content combined with your organization's readiness in each area contact:

Mary Sumners  
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(616) 450-5633  
www.kennariconsulting.com

*More Resources Available!*

*Use coupon code "QgivCampaign" for a free series at [getfundkit.com](http://getfundkit.com)*



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# Questions?

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This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.



# Thank you for joining!

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For more information on Qgiv's fundraising platform, contact:

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