



Understanding a Capital Campaign: A Guide for Board Trustees and Foundation Members

What Is a Capital Campaign?

A capital campaign is a focused, time-limited fundraising effort to raise a significant sum for a specific purpose - typically facilities, infrastructure, or endowment. Unlike annual giving, capital campaigns have a defined goal, a clear timeline, and a structured donor engagement strategy. They are not simply larger versions of what you already do. They are multi-phase, multi-year initiatives that require deep coordination, sustained volunteer engagement, and organizational clarity.

When we work with organizations, our goal is not just to raise money for one initiative, but to strengthen the entire organization in the process. We want the campaign to have a positive ripple effect that sharpens your message, deepens relationships with donors and volunteers, aligns leadership, and builds systems that continue to serve the organization long after the campaign ends.

The Campaign Readiness Study

Before committing to a full capital campaign, we will conduct a Campaign Readiness Study. Think of it as a foundation check to assess donor appetite, test our project summary, validate our goal range, and surface any gaps that need attention before we ask anyone for a major gift. It replaces assumptions with real insight, so that when the Board votes to move forward, that decision is grounded in data rather than hope.

The study typically takes place over five months and includes one-on-one interviews, focus groups, and a public survey with community stakeholders. It results in a comprehensive report that guides decision-making on scope, timing, and next steps.

As a Board Trustee or Foundation Member, here is what we are asking of you during the study:

- Participate as an interviewee in the Study Summit, *approximately one hour*



- Review of the project summary and offer feedback, *approximately one hour*
- Help identify names of individuals who might be invited to participate in the Study Summit, *approximately one hour*
- Optional: Join the Study Summit Committee, a small group of eight to ten community leaders who help guide the process and ground it in the community, *approximately three one-hour meetings*

While the readiness study phase is a relatively light lift for Trustee and Board members, your input during this phase directly shapes the direction of everything that follows.

The Capital Campaign

Should the Trustees and Board vote to proceed after the readiness study, participation in the capital campaign will look like:

- Read and validate the case statement. You will review the campaign's core narrative and then share it with three to five people in your network; not to solicit, but to gather feedback, test the message, and begin building relationships with potential supporters. *Approximately six to eight hours*
- Help identify prospects. We will ask for your help generating names of potential donors throughout the campaign. *Approximately one to three hours*

We do strongly suggest Trustees and Board members:

- Join one campaign committee. Committees meet once a month and are one of the most meaningful ways to demonstrate that the board is behind this effort. This is not a requirement, but it is a strong signal of organizational support to the broader community. Committees include Case, Communications, and Prospect. *Time commitments vary but each committee will meet monthly for one hour*

For those who want to get even more involved:

- Join the Steering Committee. Steering committee members take an active role in soliciting the organization's closest and most aligned supporters. This involves making connections, sending emails, scheduling phone calls and visits. The time commitment varies based on how many relationships you are personally cultivating, but expect a few hours per week during the silent and public phases, in addition to the monthly one-hour meetings.