

Stage 1: Organization and Planning

1. Organizational Structure & Readiness

- 1) Steering Committee established
- 2) Recruit for Full Time Campaign Director
- 3) Campaign readiness audit revisited and readiness deficiencies resolved

2. Campaign Leadership/Champions Recruited

- 1) Chair(s) recruited
- 2) Cabinet/Fundraising Committee established
- 3) Volunteer org structure and roles established
- 4) Volunteer recruitment undertaken

3. Campaign Plan Approved

- 1) Campaign plan and budget drafted
- 2) Campaign goal and gift chart confirmed and tested with trusted advisors
- 3) Staffing resources confirmed
- 4) Finance systems to support campaign confirmed
- 5) Data system readiness to support campaign confirmed
- 6) Policies and templates confirmed - gift acceptance, gift counting protocol, donor agreements, recognition and naming opportunities plan, etc
- 7) Government relations/partners plan confirmed (if applicable)
- 8) Prospecting, cultivation and stewardship strategies confirmed
- 9) Initial prospect list and research profiles developed
- 10) Prospect clearance process confirmed
- 11) Prospect status/campaign reporting tools confirmed
- 12) Post-campaign legacy program confirmed (if applicable) – sometimes an endowment, or a strengthened annual program, scholarships program, alum program etc

4. Case for Support Finalized

Project(s) content/details confirmed

- 1) Campaign project approvals
- 2) Case drafting
- 3) Case testing with stakeholders and potential donors
- 4) Case approval
- 5) Case materials developed

Stage 2: Cultivation and Solicitation of Gifts

1. Quiet Phase/Lead Gifts Secured

- 1) Regular meetings of Campaign Cabinet/Fundraising Committee
- 2) Prospect clearance process underway
- 3) Prospect identification and research continues
- 4) Tailored cultivation and solicitation plans developed
- 5) Lead gift calls
- 6) Tailored stewardship plans developed for lead donors

2. Public Phase (typically at > 50% of goal being reached)

- 1) Regular meetings of Campaign Cabinet continue
- 2) Campaign announcement, donor recognition announcements, celebration events as major gift commitments secured
- 3) Prospect identification, clearance, calls continue
- 4) Tailored stewardship plans developed for donors
- 5) Donor recognition program implemented

3. Community Phase (optional – usually a grassroots campaign)

- 1) Development and approval of community campaign
- 2) Resourcing/partner(s) for community campaign confirmed
- 3) Implementation of community campaign

Stage 3: Celebration, Stewardship and Legacy Program

- 1) Thank You & Celebration events for donors and volunteers
- 2) Timely pledge reporting, reminders, collections
- 3) Stewardship of donors continues
- 4) Final campaign reporting/evaluation conducted
- 5) Legacy program implemented (optional)