

Capital Campaign Materials

The following is a list of materials needed for a typical capital campaign. You may not need all of them, but chances are you will need most, most notably the case statement, which is the cornerstone of all your materials.

- Case Statement
- Annual Report
- Business Cards and Stationery
- Brochure
- Q and A Brochure
- Newsletter
- E-mail Newsletter
- Press Releases
- Pledge Cards
- Donor Recognition Gifts
- Major Gift Prospectus
- Theme
- Web Site
- Video or DVD
- Poster
- Volunteer Giveaways
- Volunteer Guidebook

Once you have determined which materials you need, create an overall timeline for their development, production, and use. The case statement should be the first piece produced, created early in the campaign. The other pieces should be done in time for solicitations.

Case Statement

The case statement gives an overview of the organization, and more importantly, it outlines the reason for and the specific needs of the campaign. These include immediate needs and long-term goals. Talk about your history and where you want to go. Give the reasons people should join you in achieving your dream. Keep it simple—the message needs to be clear and captivating. This is where you introduce your campaign logo and tagline, if you have one.

These should be treated like a sub-brand of your organization's usual logo and tagline.

This is important: all other campaign materials grow from the case statement, so be sure it is well planned and executed. This includes involving your leaders early on, for four important reasons:

1. Ensuring buy-in from your leadership;
2. Ensuring that the proper information is in the case statement;
3. Creating enthusiasm on the part of staff and volunteers;
4. Showing your prospects that the campaign is serious.

Annual Report

This is one piece that you may already have. If you don't, you should, as it is the best overview of your organization and a complement to the case statement. The report explains your mission and vision and reinforces your values through summaries of your activities and programs in the last twelve months. Lastly, it presents your (hopefully stable) financial picture.

Business Cards and Stationery

You may have cards already, but are they specific to the campaign? All staff and volunteers should have business cards that are designed for the campaign. In addition to the normal contact information, these cards should include the campaign theme. Encourage people to be proactive about handing out their cards. Buy each person a holder to protect the cards; nothing is less appealing than receiving a bent and scuffed card.

Stationery usually includes campaign-specific letterhead and second sheets, #10 business envelopes, and mailing labels. It may also include large envelopes for mailing the major gift prospectus.

Brochure

The brochure is basically a concise version of the case statement. Both need to be clear and appealing, and be printed in full color. This is the key development piece most people will receive, since the case statement is too expensive to give to everyone. The brochure may include gift recognition opportunities, or those may be printed on a separate sheet.

Q and A Brochure

The question-and-answer brochure addresses commonly asked questions about the campaign. This should not be an expensive piece, but it should be well planned. Be sure to update it as needed. Include basic institutional statistics in this place.

Newsletter

The newsletter need not be specific to the campaign, but it should include campaign progress updates and, most importantly, should list donors and recognize campaign leaders. The newsletter should be your most important long-term campaign piece. Donor profiles can motivate others to give. Each issue should open with a message from the president, chair, or campaign head. A general note: newsletters take more time than you think. They can look deceptively simple, since they are often printed in one or two colors, but there are many components to organize. If you have never done a newsletter, double the amount of time, money, and energy you think it will take.

E-Mail Newsletter

This is usually not a link to a pdf version of the printed newsletter, although that is a possibility. The e-mail newsletter is shorter and less graphic, so that it will load quickly on the recipient's screen.

Press Releases

You will need to work with a public relations specialist to decide when and how to do press releases, but in general they need to announce the campaign kick-off, major campaign gifts, special events, and milestones. If the news is truly important you can hold a press conference. Most of the time you will mail/e-mail/fax press releases in the hope that the

news will be picked up by the media. Whether the distribution method, your “press kit” should include:

- The press release, including appropriate biographies and photos
- Campaign brochure
- Q and A brochure

Pledge Cards

This is the official record of a donor's gift. It needs to include:

- Donor's name
- Donor's address, phone, and e-mail
- Gift amount
- Payment schedule
- Payment method and details
- Donor recognition options
- Donor's signature and date

Donor Recognition Gifts

Don't just consider the obvious, such as mugs, pens, and T-shirts. Think about what your donor base might appreciate, for example, plaques, paperweights, reprints of speeches and presentations, and bookends. In general donor recognition varies between large and small donors. Small donors are more likely to appreciate gifts; large donors expect personal contact that requires more high-level recognition, and they may not be interested in gifts at all.

Major Gift Prospectus

The major gift prospectus is a folder or packet that includes the brochure, a solicitation letter, recognition opportunities (if not in the brochure), Q and A brochure, selected press releases, the annual report, and pledge card. The prospectus packet may involve the design and production of a folder and large envelope.

Theme

Choosing a theme can eat up a lot of your time and energy. For starters, review your mission, vision, and values. If you have one, take a look at your motto. For those who want to delve deeply into this process we recommend Word Craft by Alex Frankel. Those with less time may want to try Steve Manzi's Campaign Name-O-Matic System® (www.onphilanthropy.com/bestpract/bp2003-09-05a.html).

Web Site

This can be its own site or part of the organization's existing site. It should touch on items mentioned in the case statement, maintain the donor list, offer ways to donate online, and offer information about upcoming related events.

Video/DVD

Be sure to hire an expert. You can find a video producer on your own, or communications firms can make recommendations. The average video should be about eight minutes long, and at an average of \$1,000—\$1,500 per minute, it will cost about \$8,000—\$12,000. Unlike print, which conveys information, video conveys an emotional appeal. Don't include a lot of information in the video, but concentrate on a few key messages: the reason for the campaign, how the goals will be accomplished, and the expected benefits. Include the financials, but don't let them dominate the piece. The video/DVD's goal is the same as the case statement's, but with a more emotional and graphic edge. The video is a tool to accompany a meeting with a prospective donor; it is not a substitute for a personal visit. Be sure to buy a portable TV/VCR/DVD player to take on each visit.

Poster

A campaign poster is optional, but should be considered. A well-planned poster is memorable and raises awareness of the campaign. Posters are seen but not read, so banish the temptation to load the poster with words. Include the theme, organization logo, and contact information only. Concentrate on a strong visual component.

Volunteer Giveaways

These are items that show the organization's appreciation for and build team spirit among volunteers—things such as T-shirts, mouse pads, pens, and mugs.

Volunteer Guidebook

This handbook provides a campaign overview, sample letters and scripts, and key themes and messages.