

Capital Campaign Roles and Responsibilities

P = primary responsibility, S = secondary, T = tertiary, O = oversight

Campaign Preparation	Counsel	Board	Volunteers	Staff
Design Case for support				
Approval				
Determine Building & Program Goals				
Determine basic fundraising strategies				
Set exact amount of campaign dollar goal				
Determine how development effort will be financed				
Determine need for bridge financing if construction begins before funding completed				
Determine staffing and consultant needs				
Recommendations				
Finalize				
Design Campaign Plan				
Input				
Finalize				
Develop timeline and volunteer structure				

Campaign Administration	Counsel	Board	Volunteers	Staff
Discipline the Plan				
Budget development, implementation, administration				
Leadership and volunteer identification and recruitment				
Development of committee job descriptions				
Prospect list management				
Gift acknowledgements and receipts				
Gift reports – processing				
Obtain system; train staff				
Review and analysis				
Mailings (communication, direct mail, mtg notices)				
Campaign committee – strategies; agendas; prospect assignments; assignment follow up; meeting notices				

(place, refreshments); minutes; attendance and participation				
Public relations committee – agendas; follow up; strategies and plan; meeting notices (place, refreshments); minutes; attendance and participation				
Other committees as outlined in Campaign Plan				

Prospect Identification	Counsel	Board	Volunteers	Staff
Research				
Individuals				
Foundations				
Corporations				

Prospect Cultivation	Counsel	Board	Volunteers	Staff
Communications				
Strategy				
Design and processing				
Press releases				
Campaign materials				
Strategy				
Design and processing				
Prospect / donor meetings				
Strategy				
Scheduling, confirming				
Events				
Strategy				
Event Plan				
Lists				
Event implementation				
Participation				
Follow-up implementation				

Major Prospect Solicitation	Counsel	Board	Volunteers	Staff
Strategy				
Proposal writing				
Rehearsals / training				
Participation in solicitation				

Public Campaign	Counsel	Board	Volunteers	Staff
Strategy for solicitations of \$25,000 or less				
Direct mail				
Strategy				
Writing				
Processing				
Events				
Strategy				
Materials				
Event implementation				
Follow up implementation				

Donor recognition and stewardship	Counsel	Board	Volunteers	Staff
Communications (ongoing)				
Mementos				
Press releases				
Individual acknowledgement				
VIP invitations (ongoing)				