



Planning a Successful Capital Project Fundraising Appeal: #5 Key Steps

Juliet Evans
Diocesan Fundraising Adviser

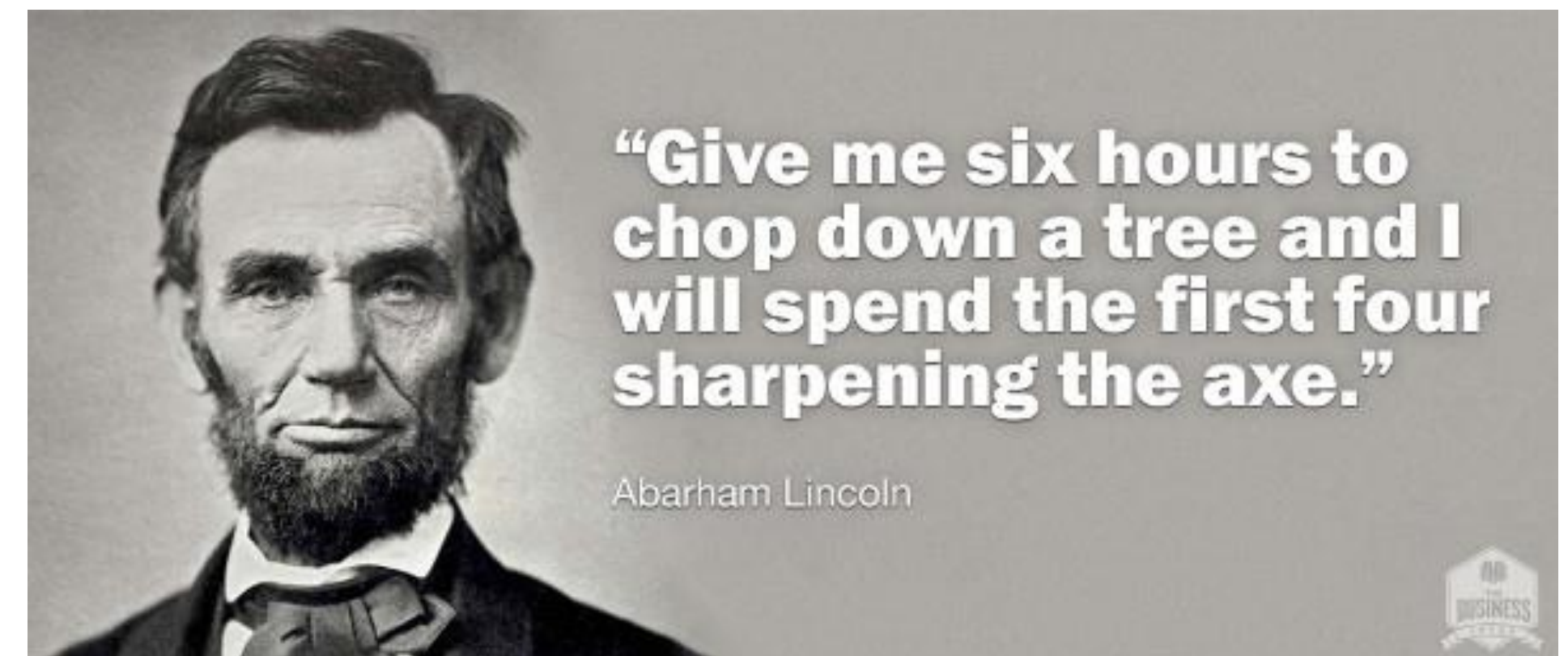
Your capital project

- **An introduction to project fundraising**
- **#10 Fundraising myths**
- **#5 Key ingredients**
- **#5 Key steps in planning your appeal**
- **Resource bank**

What is a capital appeal?

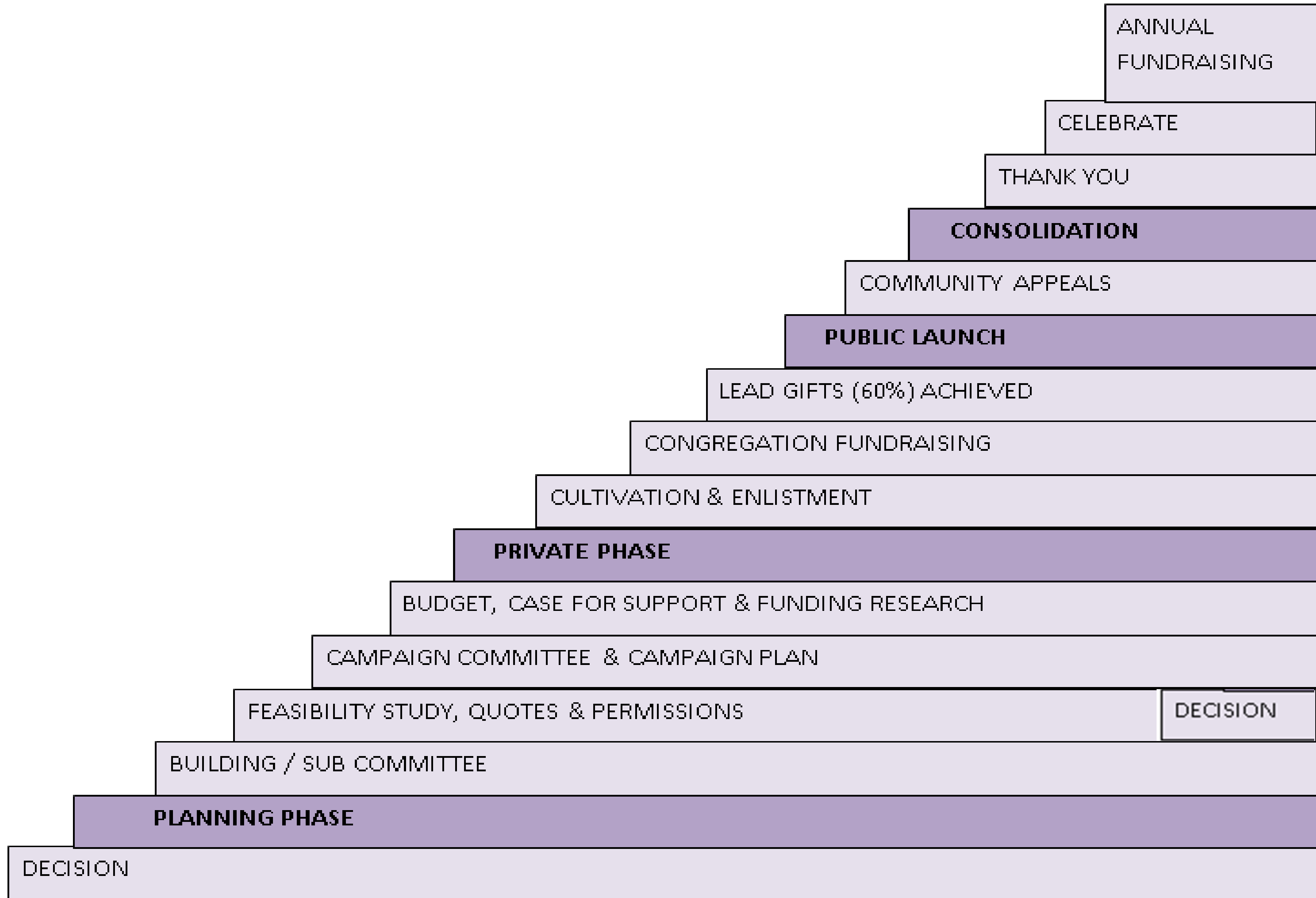
**“The most amount of money
from the fewest possible sources
in the shortest possible time.”**

Good planning is key



#5 Key steps

- 1. Decision/s**
- 2. Planning phase**
- 3. Private phase**
- 4. Public phase**
- 5. Consolidation**



#5 Key steps: 1. Decision/s

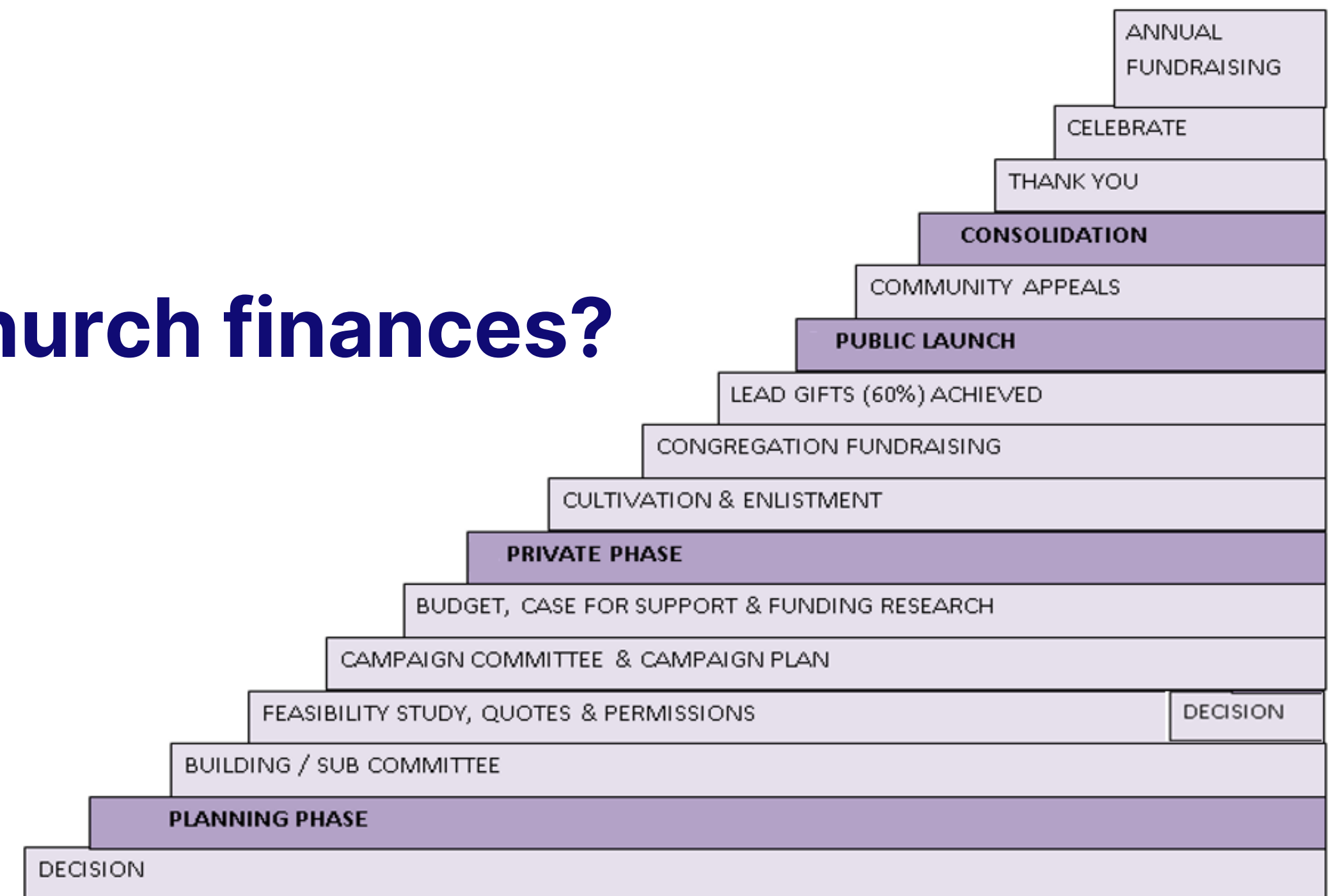
1. Making the decision

2. What and why?

3. Timing:

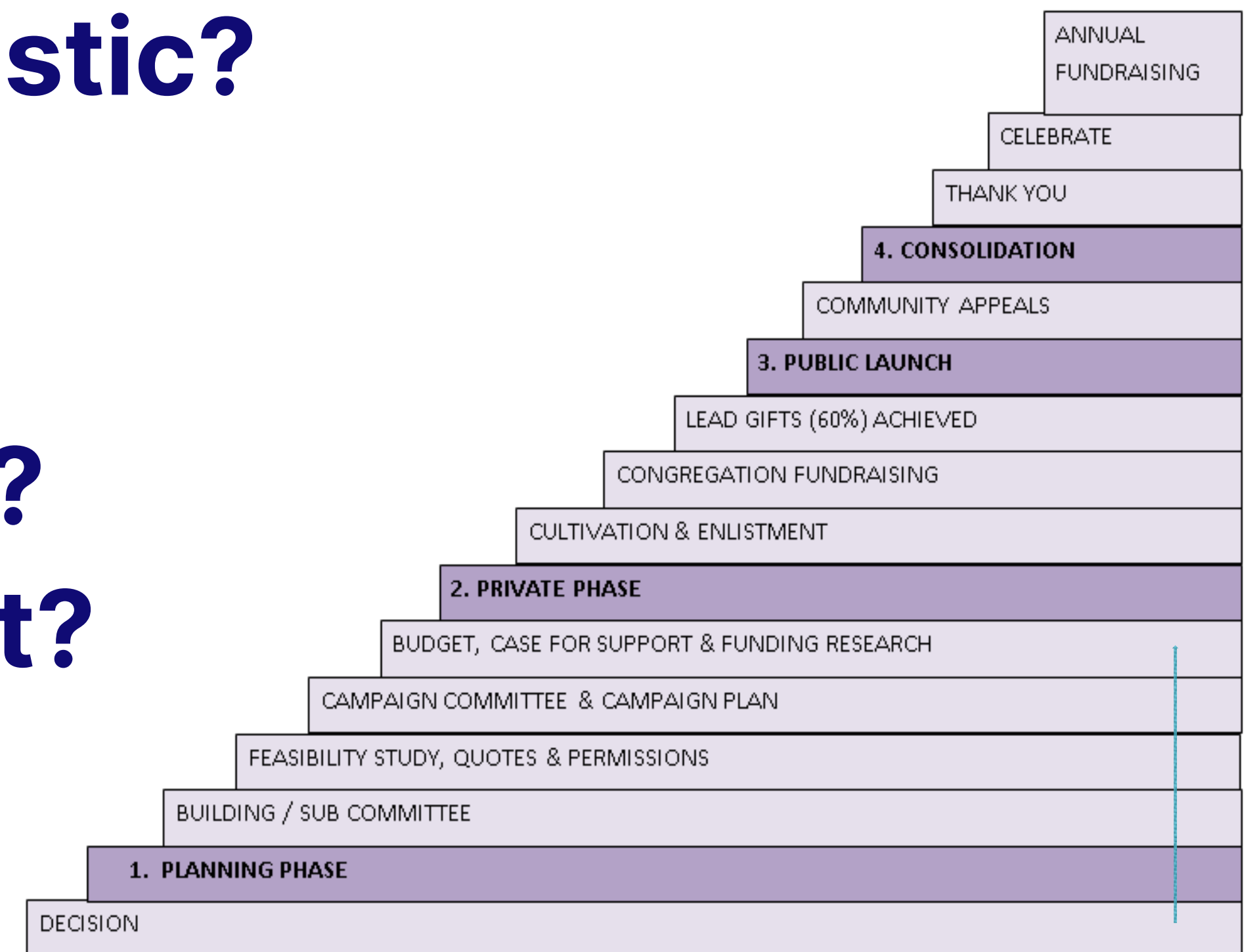
- Urgent? Important?
- How does the project sit with wider church finances?
(especially regular giving)
- Is this project a 'distraction'?
- Coincides with anniversary?

4. Decision after feasibility study



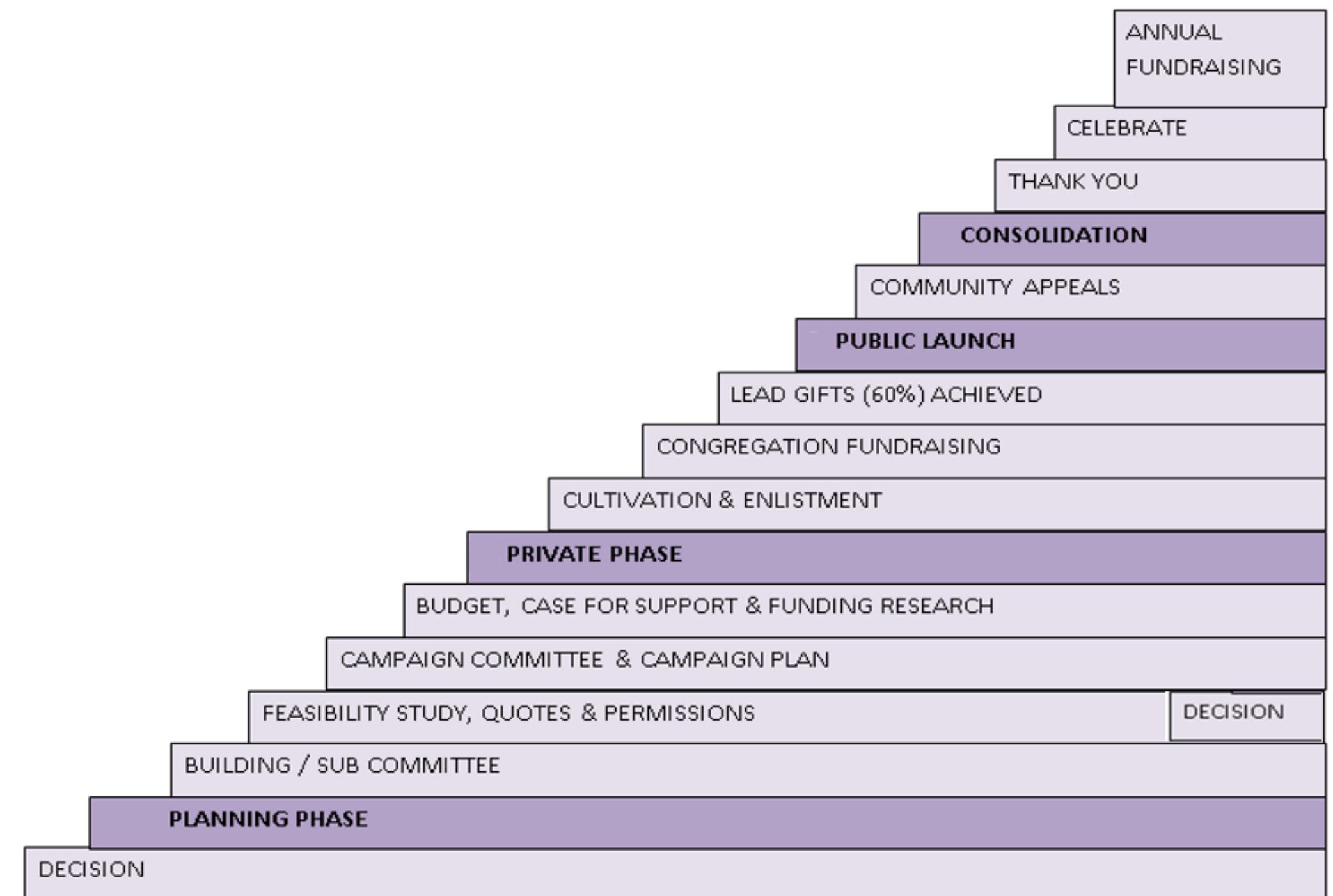
#5 Key steps: 2. Planning phase A

1. Buildings committee – who & communication?
2. What's the need?
3. Feasibility? What's possible/realistic?
4. Congregation? Community?
5. Budget for initial research?
6. What if we *don't* do this/this way?
7. Pros/cons of 'phasing' the project?
8. Quotes & permission?
9. Decision time



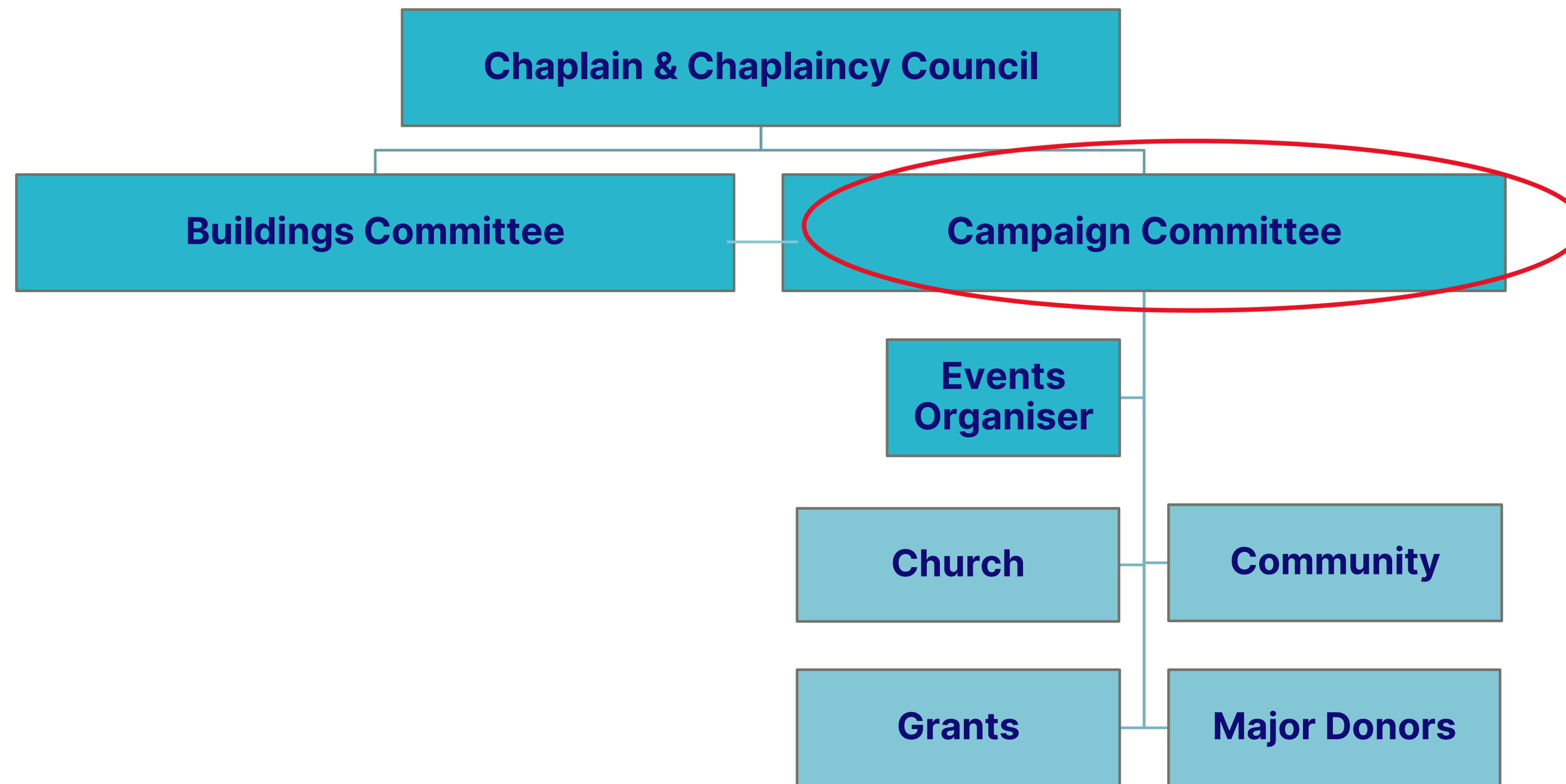
#5 Key steps: 2. Planning phase B

1. Campaign committee – who & ‘co-opted’ members?
2. ‘Terms of reference’
3. ‘Case for support’
4. Your network
5. Funding research
6. ‘Table of gifts’
7. How are people going to give?
8. Budget for communication
9. Forming the plan & resources



#5 Key steps: 2. Planning phase B

1. Campaign committee



#5 Key steps: 2. Planning phase B

2. Terms of reference

- A short document outlining role of the group, objectives, meeting frequency, reporting to Chaplaincy council etc.
- See the template in the **Capital Appeal Fundraising Resource Bank** on the diocesan website

#5 Key steps: 2. Planning phase B

3. 'Case for support'

- **Single, short document summarising:**
 - **What is the project?**
 - **Why are we doing this project?**
 - **Why people will give to this project?**
 - **What difference will this project make?**
 - **Need, Solution, Outcome**
 - **Historical/cultural context**
 - **Frequently asked questions**

#5 Key steps: 2. Planning phase B

3. 'Case for support'

- **Single, short document summarising:**
 - **Our history**
 - **Our vision/mission**
 - **The plan**
 - **The cost**
 - **The difference the project will make**
 - **Why people should support this appeal? How can they give?**
- **Coming soon: template in the [Resource Bank](#)**

#5 Key steps: 2. Planning phase B

3. 'Case for support': Outcomes

“Currently the congregation meets for coffee in another location, where older members must drive... Some members of the congregation do not socialise.. . This time is important for the giving and receiving of mutual support amongst members of the community, esp. older members of congregation who don't have family nearby.”

“The new kitchenette and toilet facilities would strengthen community support and help to alleviate loneliness among our elderly residents.”

#5 Key steps: 2. Planning phase B

3. 'Case for support': Evidence

- “An accessible lavatory is essential, as we need to be able to provide modern, clean facilities which meet health and safety standards if we are to be able to offer the building for use to the wider community.”

“After a twenty-minute drive to get to Church, it would be great to have the availability of an accessible toilet.”

RM, aged 83



Use photos
(with permissions!)
to communicate your project.

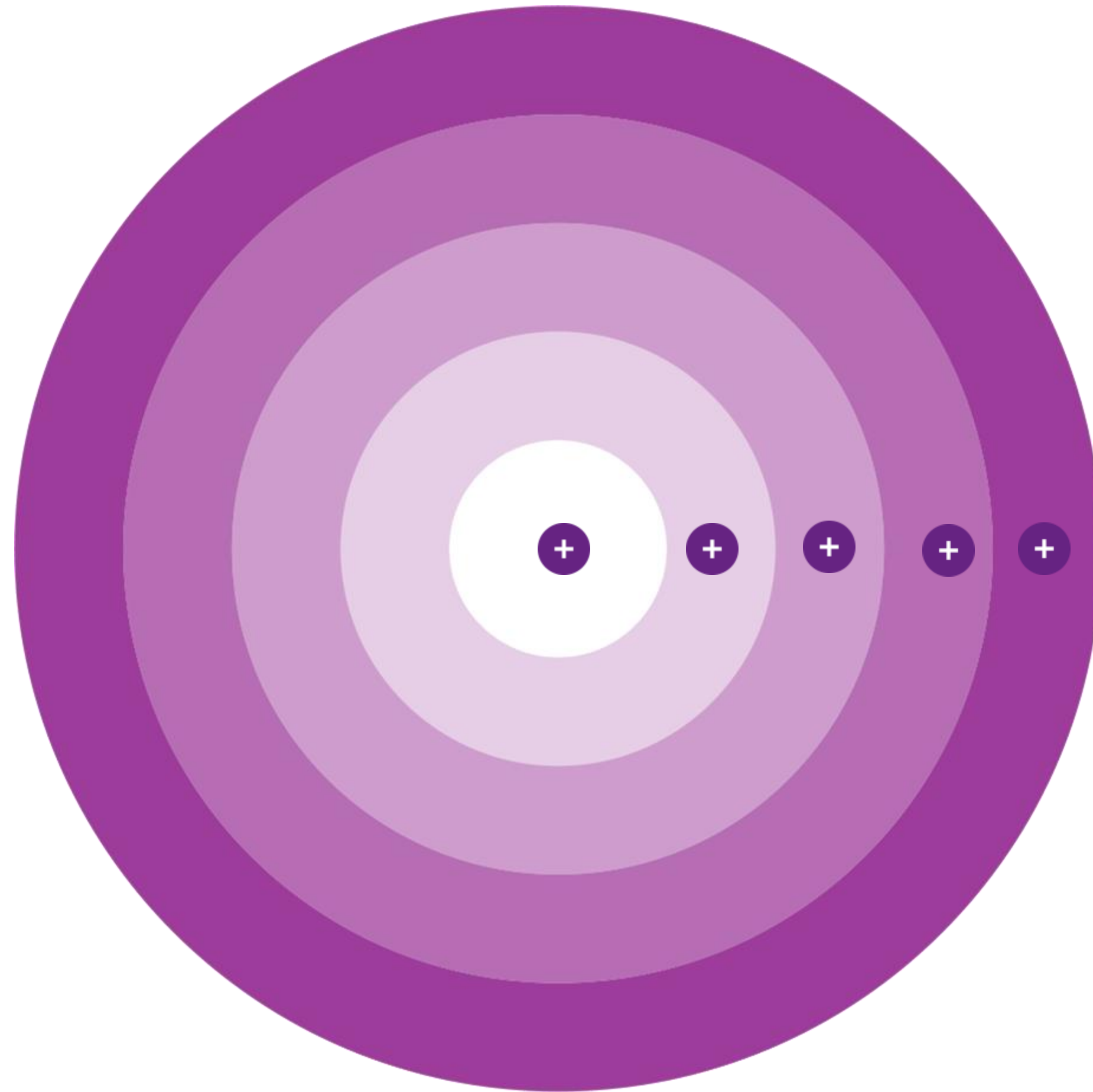
#5 Key steps: 2. Planning phase B

4. Your network

- **Who knows who...?**
- **Does anyone have contacts with any grants charity/major donor/community leader etc?**
- **Who will contact & how?**



Mapping out your potential donors



Start with people who have given before (ie congregation, 'friends').

Then move outwards to different/new people.

#5 Key steps: 2. Planning phase B

5. Funding research

- Local grants? (council, regional, national?)
- Historical, religious, community, net zero?
- Trusts & foundations?
- Major donors/families in the community?

Would they fund your project? How much?

Application deadlines?

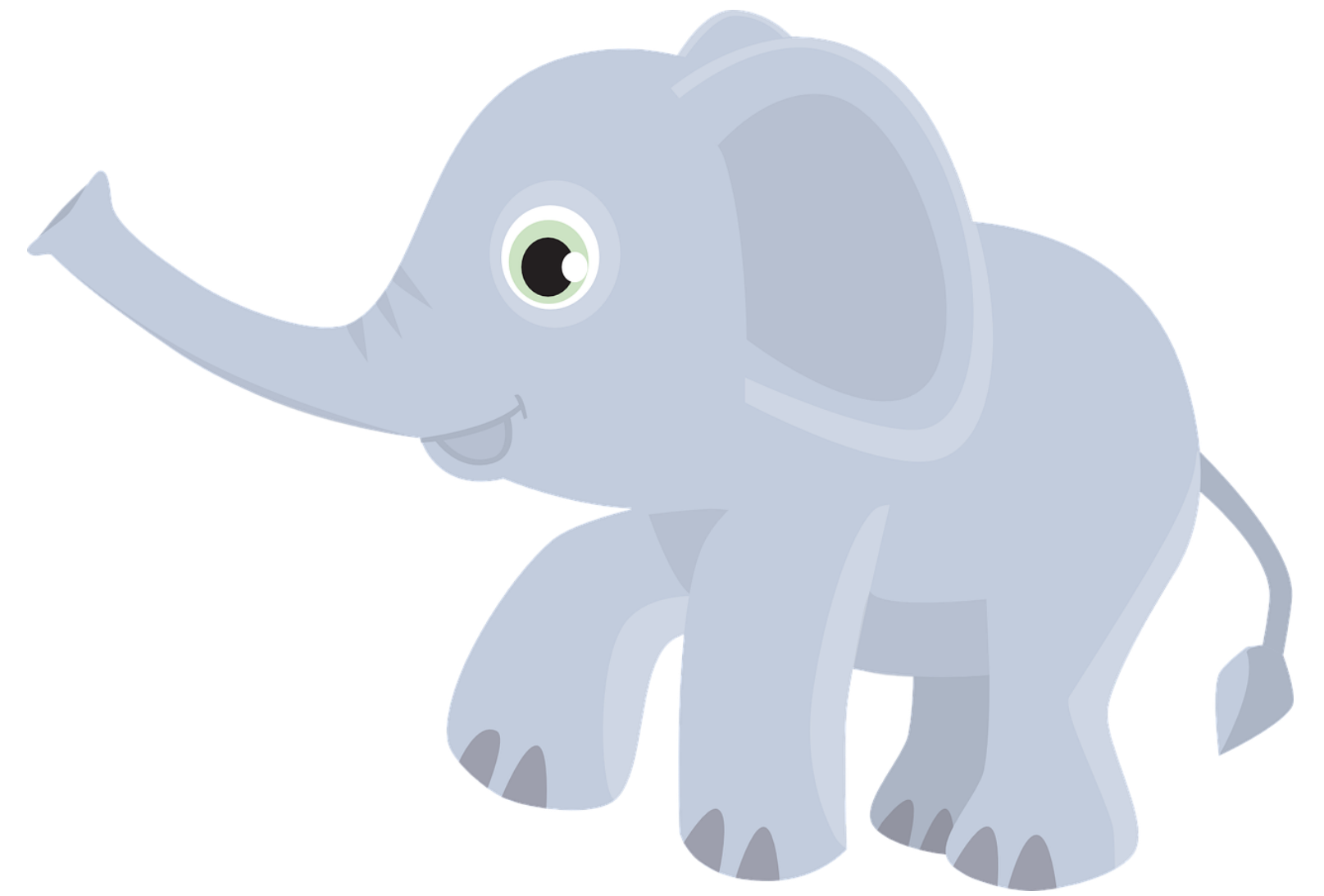
How are you going to reach these people, monitor donations, and thank them?

1. Identify
2. Research
3. Plan
4. Cultivate
5. Ask
6. Thank
7. Steward

#5 Key steps: 2. Planning phase B

6. 'Table of gifts'

- Spreadsheet or chart showing where the money might come from to reach the total amount.
- **Q. "How do you eat an elephant?"**
- **A. "One bite at a time..."**



'Table of gifts'

Gift Size	Number of Gifts	Total Value	Sources
10,000€	2	20,000€	1x Reserves/1x Town council grant
5,000€	3	15,000€	Major congregation donors
500€	50	25,000€	Congregation donations
Private Phase Sub-Total	55	60,000€	
2,000€	6	12,000€	Key fundraising events
200€	10	2,000€	Smaller fundraising events
1000€	5	5,000€	Major community donors
500€	10	5,000€	Friends/Formers church members
3,500€	1	2,500€	Other grants
500€	2	1,000€	Local businesses/organisations
50€	100	5,000€	Community/visitor donations
50€	150	7,500€	'Buy a chair/tile/metre of pipe' donations
Public Phase Sub-Total	284	40,000€	
Total	339	100,000€	

#5 Key steps: 2. Planning phase B

7. How are people going to give?

- Bank**
- Cheques/cash**
- Online and/or card reader giving**
- Donate time/talent e.g. orchestra/singer or builder?**

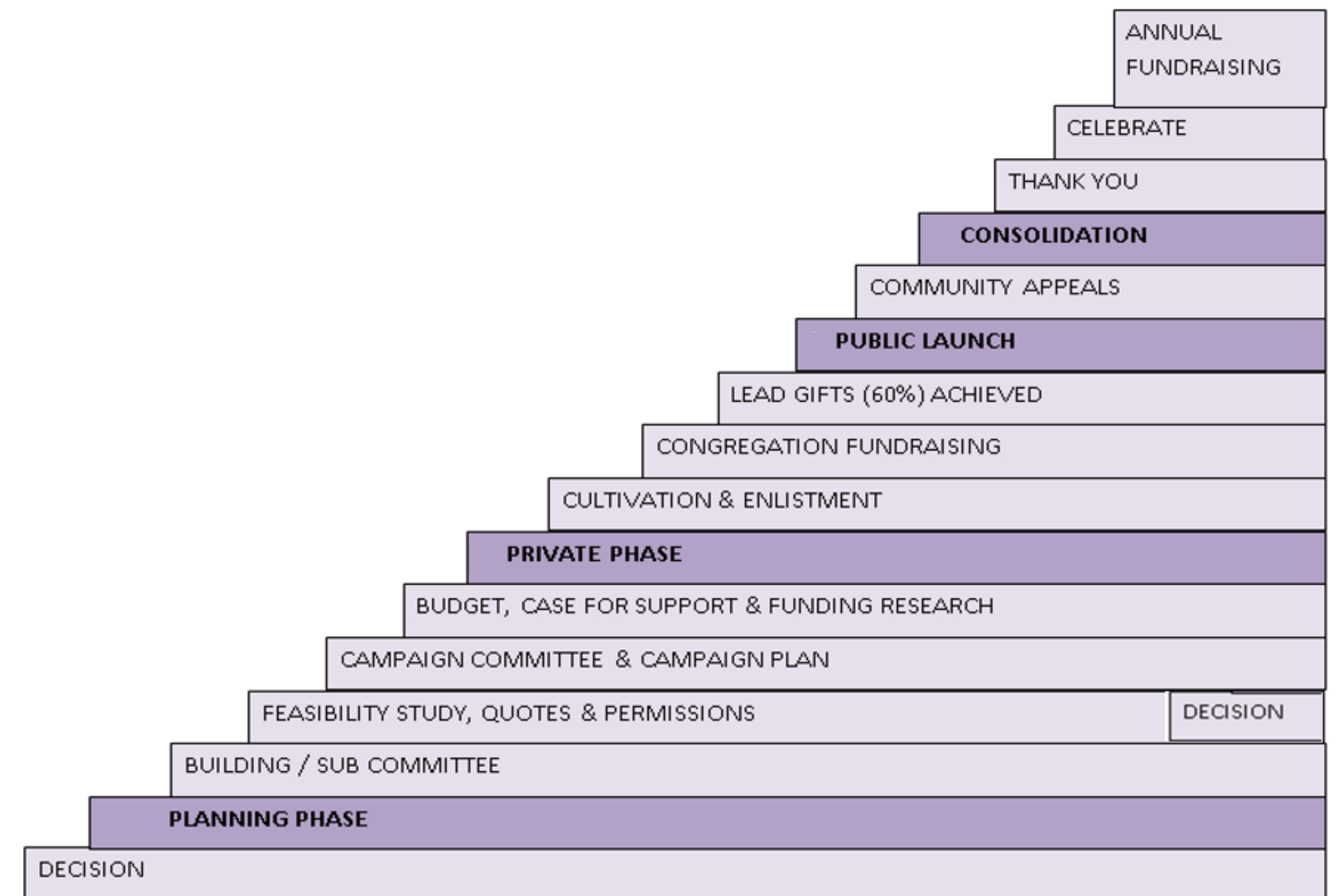
#5 Key steps: 2. Planning phase B

8. Budget for communication

- Do we need to spend for posters, leaflets, advertising etc?**

#5 Key steps: 2. Planning phase B

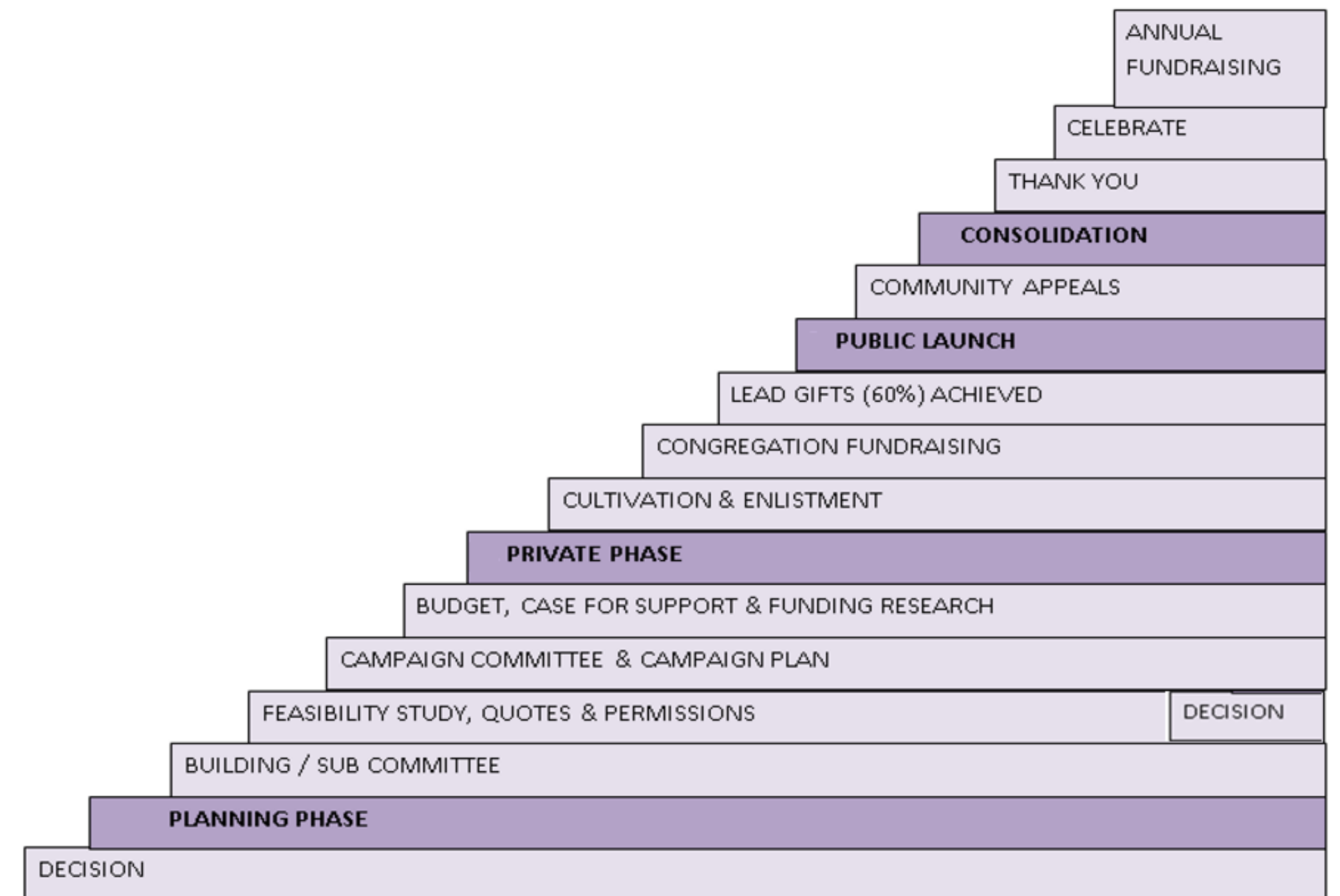
9. Forming the plan and resources



#5 Key steps: 2. Private phase

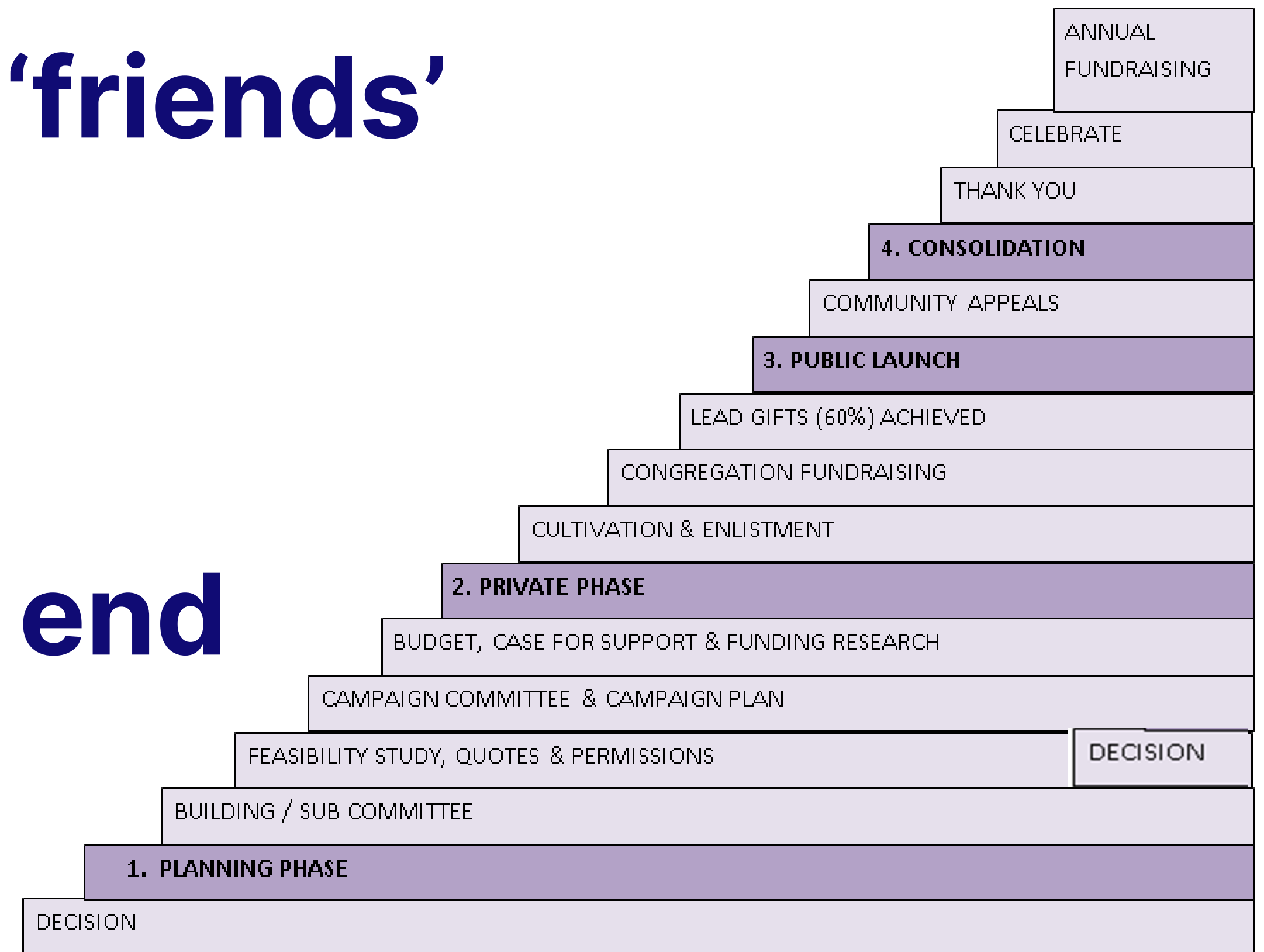
1. Lead gifts – give confidence

- Reserves?
- Major donor/s?
- Grant?
- Chaplaincy Council
- Congregation



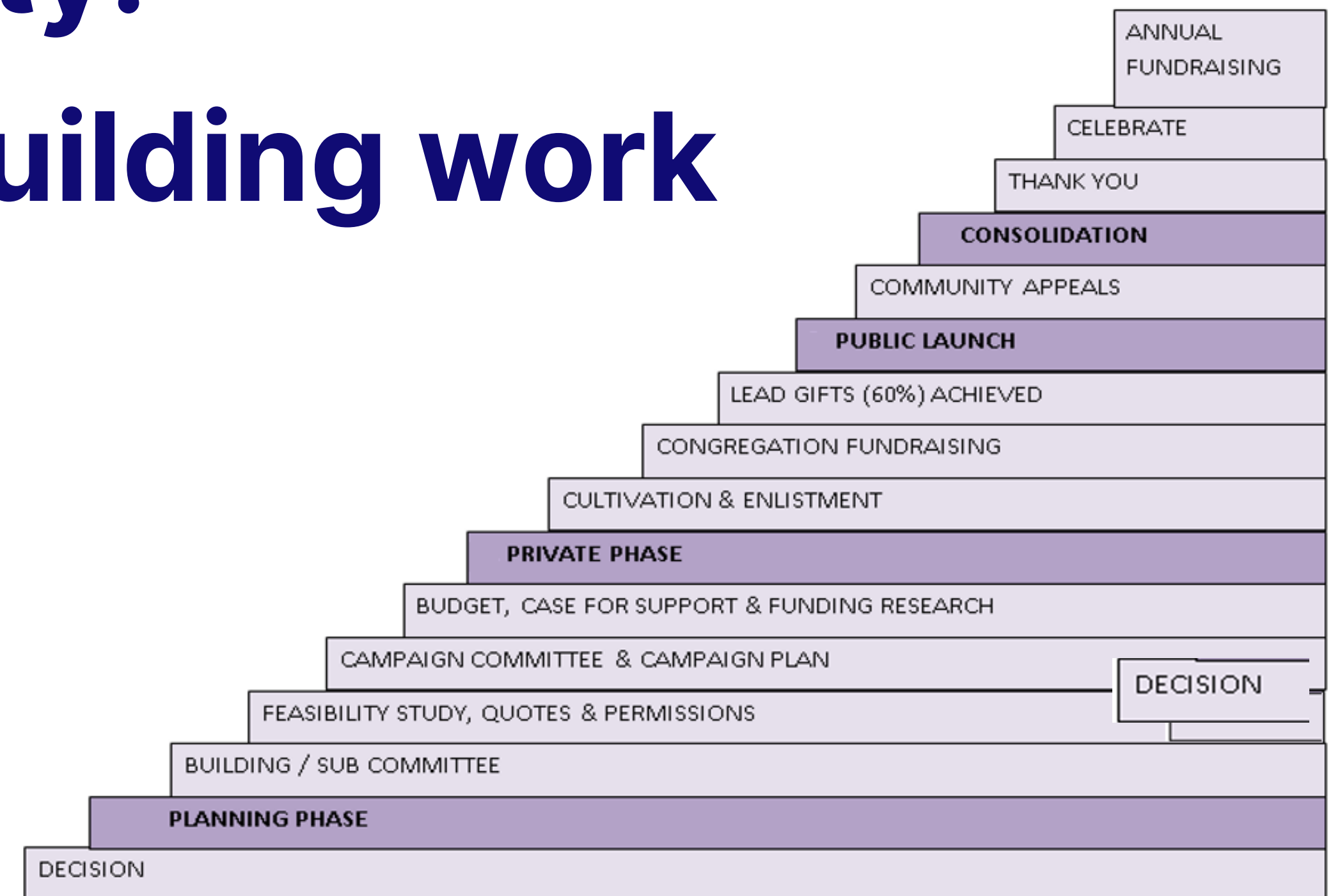
#5 Key steps: 3. Public launch

1. Church hall users(?)
2. Wider local community & 'friends'
3. Fundraising events
4. Local media
5. 'Buy an item' towards the end



#5 Key steps: 4. Consolidation

1. Thank everyone
2. Celebrate – services & party!
3. Communicate about the building work
4. Keep in touch - ‘Friends’?





- **More in-depth information available.**
- **Contact Juliet Evans for assistance.**
- **See the Resource Bank for templates and case studies to inspire you.**