



RESOURCE

Capital Campaign Checklist



Hello!

We're BrandRaise and we help small to mid-sized nonprofits align their branding and fundraising strategies to create deeper, more meaningful connections with their communities. Fundraising isn't complicated, but it can feel overwhelming—especially when your audience doesn't fully understand your work or impact.

This resource is designed to guide you through the early planning stages of your capital campaign, helping you determine the necessary steps and activities before establishing your ideal timeline. By working through this resource, you'll gain confidence that your team, infrastructure, and building

plans (if applicable) are all set and ready for the next phase of planning. It's all about ensuring you're prepared strategically and intentionally, so you can move forward with a clear, sustainable plan that sets you up for success.

Learn more about our capital campaign management services [by clicking here](#).



ORGANIZATIONAL READINESS

- ☐ **Review and update strategic plan:** Ensure your organization's long-term vision and goals align with and support the specific objectives of your capital campaign, creating a cohesive narrative for donors.
- ☐ **Assess fundraising infrastructure:** Evaluate your current donor management systems, gift processing procedures, and technological capabilities to handle increased giving volume and donor engagement.
- ☐ **Evaluate staffing needs:** Determine if your current team has the capacity and expertise to manage a capital campaign, identifying gaps that may require additional hiring or training.
- ☐ **Audit donor communications:** Review all touchpoints with donors to ensure consistent, effective messaging and stewardship practices that will support campaign success.
- ☐ **Review case statement:** Update your organization's core messaging to compellingly articulate why donors should invest in your campaign's vision.

ADDITIONAL NOTES



FINANCIAL ASSESSMENT

- ☐ **Complete financial audit:** Ensure your organization's financial records are accurate and transparent to build donor confidence and meet due diligence requirements.
- ☐ **Analyze giving patterns:** Study historical donor behavior to identify trends, loyal supporters, and untapped potential within your donor base.
- ☐ **Review fundraising programs:** Evaluate the effectiveness of your current fundraising initiatives to understand what's working and what needs improvement.
- ☐ **Develop campaign budget:** Create a comprehensive budget that accounts for all campaign-related expenses, including staff time, materials, and events.
- ☐ **Calculate ROI projections:** Develop realistic estimates of return on investment to ensure the campaign's financial viability and set appropriate goals.

ADDITIONAL NOTES



LEADERSHIP PREPARATION

- ☐ **Secure board commitment:** Obtain formal board approval and enthusiastic support for the campaign's goals, timeline, and resource requirements.
- ☐ **Assess board giving:** Ensure every board member is committed to making a meaningful personal gift to demonstrate leadership and organizational unity.
- ☐ **Form planning committee:** Assemble a dedicated team of key stakeholders to guide campaign strategy and implementation, leveraging their expertise and networks.

ADDITIONAL NOTES



BUILDING PREPARATION

(FROM OUR FRIENDS AT RISE COLLABORATIVE DEVELOPMENT)

- ❑ **Programming Assessment:** Conduct a thorough analysis of your current programs and future aspirations. Document your space requirements based on existing services and map out potential expansion areas. Consider factors like staff workspace, client meeting areas, storage, and specialized program spaces. This is your opportunity to envision your organization's future needs without constraints.
- ❑ **Financial Framework:** Develop a detailed financial model that includes current resources, fundraising capacity, and ongoing operational costs. Research comparable capital campaigns in your area to benchmark realistic fundraising goals. Factor in contingencies for unexpected costs and market fluctuations.
- ❑ **Property Acquisition Strategy:** Evaluate the pros and cons of buying versus leasing. Consider tax implications, long-term equity building, and operational flexibility. Analyze factors such as property taxes, maintenance responsibilities, and potential appreciation or depreciation of assets.
- ❑ **Development Approach:** Carefully weigh the tradeoffs between new construction and renovation. Assess variables such as timeline, cost, environmental impact, and customization potential. Consider how each option aligns with your mission and organizational culture.
- ❑ **Site Selection:** Identify optimal locations based on key criteria: accessibility for clients and staff, proximity to partner organizations, public transportation access, parking availability, and neighborhood demographics. Consider future development patterns and community needs.
- ❑ **Architectural Partnership:** Select an architect who understands nonprofit operations and shares your vision. Evaluate candidates based on their portfolio, fee structure, communication style, and experience with similar projects. Request detailed proposals addressing your specific needs and timeline.
- ❑ **Construction Management:** Develop a robust selection process for your general contractor. Watch for common issues like hidden fees, markup on materials, and change order policies. Request detailed bids with clear breakdowns of costs, timeline, and contingencies. Consider engaging a construction manager to represent your interests throughout the project.





WHAT ARE YOUR BEST NEXT STEPS?

- Begin identifying your ideal timeline, which includes starting with a campaign readiness study before your capital campaign process
- Create a planning committee role description
- Assemble 6-8 people on your capital campaign planning committee



We hope this document has provided a strong starting point, answered your questions, and sparked excitement about the possibilities ahead.

We're passionate about helping nonprofits like yours bridge the gap between branding and fundraising to achieve sustainable success. If our values, approach, and vision align with what you're looking for, we'd be honored to partner with you on this journey.

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