

ISAACSON//SYVERSON CONSULTING

ROOSEVELT HIGH SCHOOL FOUNDATION CAPITAL CAMPAIGN TIMELINE

Planning Phase: November 2019 – February 2020

- Confirm campaign priorities and goal
- Draft timetable and campaign structure
- Revise content for campaign brochure
- Recruit Campaign Cabinet
- Conduct cultivation/awareness activities with leadership prospects

Campaign on hold due to Covid: March 2020 – November 2020

Campaign restart: Finalize Planning Phase November 2020 – December 2020

- Finalize Campaign Leadership (Chairs, Honorary Cabinet, Cabinet)
- Confirm project scope and message points
- Revise campaign brochure

Leadership, Major Gifts & Special Gifts Phase: January - July 2021

- Activate Campaign Cabinet
- Create campaign structure
 - Develop and approve policies and procedures
 - Identify and approve named gift opportunities
 - Print brochure
 - Draft internal processes – pledge recording, gift receipting, reports, etc.
 - Create printed support materials – pledge cards, receipts, letterhead, etc.
- Develop leadership and major gifts prospect lists
 - Leadership gift = \$100,000 and above
 - Major gift = \$50,000 to \$99,999
 - Special Gift = \$10,000 - \$49,999
- Develop divisional goals:
 - “Family” (Board & Cabinet)
 - Classes by decade?
 - Individuals
 - Other?
- Begin soliciting leadership gifts (January, February, March, April)
- Begin soliciting major and special gifts (April, May, June, July)
- Continue cultivation activities for leadership/major gift prospects
- Create grant calendar with ask amounts and proposal deadline dates
- Provide Cabinet training on “Making the Ask”
- Fundraising benchmarks:
 - Reach “family” goal – in dollars and 100% participation (by March 2021)
 - Reach 60% of \$5 million goal: \$3,000,000 (by July 31, 2021)

Special Gifts and Public Phase: August - December 2021

- Revise gift charts as needed
- Continue prospect research and adding prospects
- Continue Special Gifts and donations \$5,000 or less
- Implement public phase of campaign – the Public “Kick-Off” Strategies:
 - Create communications plan
 - Roosevelt alumni
 - Roosevelt parents and families
 - Roosevelt students (?)
 - Media releases
 - Mailings: letter with brochure to all prospects not yet contacted (Sept)
 - Kick-off event(s)
 - Back to School event?
 - R party with campaign focus?
 - Event for families?
- Fundraising benchmark:
 - Reach 100% of goal: \$5,000,000 (by December 31, 2021)

Wrap-up Phase: December 2021 – January 2022

- Implement celebration & recognition event – donors, volunteers, Board
- Begin tentative plans for ground breaking activity in spring 2022
- Evaluate campaign results – Final reports
- Announce success through variety of media