**Trainer’s Outline-Capital Campaigns**

1. Introduction to Capital Campaigns
2. Welcome to Training: Slide 1
3. Our goal for this training is to show you how you can use InterChange (IC) to monitor, manage and track the progress of your Capital Campaigns (CC)
4. We’d also like to leave you with some helpful hints about how to run a successful Capital Campaign
5. Presenters (introduce selves): Slide 2
6. Dean Feener
7. Debbie Diaz
8. What is a Capital Campaign?: Slide 3
9. In short, it’s a way for us at The Salvation Army to help as many people as possible. (150 years slide)
10. It’s a way for us to build helpful centers for the communities in which we serve (Kroc Center slide)
11. It’s a way for us to build trust with the communities that we serve (ARC slide)
12. It’s a way for us to create and run programs for the communities that we serve (Summer Camp slide)
13. Technically, a Capital Campaign is a set of fundraising and outreach activities focused on raising money for a specific and defined need. But what it REALLY is, is a way for us to do the most good (Doing the most good shield slide)
14. There are several characteristics of a CC that make it a bit different from other fundraising endeavors: Slide 4
15. It has a narrowly defined need or focus
16. It has a specific financial goal
17. It is a timeframe/deadline for meeting the goal
18. It has a chosen group of volunteers, such as a Board
19. It makes MAJOR GIFT fundraising a priority
20. It has a recognition plan in place for major gift donors
21. There are 5 stages of a CC: Slide 5
22. InterChange can help you with 4 of these stages (click to show graphic)
23. In the Planning Study, it can help you analyze prospects by looking at current prospect plans and opportunities.
24. In the Quiet Phase it can help you by giving you a place to set all of your goals, secure and track your gifts from major donors and run the reports you need to gauge your progress.
25. In the Public Phase, it can help you track additional prospects you may be cultivating, throwing fundraising events.
26. In the Celebration Phase, IC can help you with your acknowledgements and a celebration event.
27. These are just some of the way IC can help you with your CC. You’ll probably think of additional ways IC can help you launch a successful CC as you learn how to use the Fundraising module in IC.
28. Some important terms you will need to know: Slide 6
29. Designation: Slide 7
30. Where donated funds should be applied
31. For example, if your CC is raising money for a new Kroc Center building, one of the designations could be the Library.
32. SST will set these up for you based on your defined needs
33. Purpose: Slide 8
34. The reason for a specific fundraising goal
35. Can be tied to designations (if accepting revenue)
36. Can just be used for reporting purposes
37. Example: Designation LIB101’s purpose for building the library in our new Kroc center.
38. Hierarchy: Slide 9
39. Used only for top-level campaign records (not used if it’s a rollup campaign)
40. Consolidated view of how you’re progressing towards your big, main CC goal
41. IE: You can have one campaign for each room you’re trying to raise money to build for your Kroc Center but all of these campaigns can roll-up under the main, top-level campaign of raising total dollars for the Kroc Center
42. SST will set these up for you, based on your defined needs
43. Priorities: Slide 10
44. If you need to track additional fundraising goals that have subset of a goals, you can use priorities
45. If your Capital Campaign is raising money for a new library, you may have subgoals for the library goal, such as fundraising goals for books and computers.
46. It’s really up to the user’s needs when organizing a CC to decide how to use Goals, Hierarchy, and Priorities for the best organizing of tracking progress
47. Fundraisers and Committees: Slide 11
48. Fundraisers and Fundraising Committees are actually a special role in InterChange that have to be assigned
49. Fundraisers and Fundraising Committees can set up Prospect Plans and Opportunities (more on that later in this training series)
50. These are the people or teams that are going to cultivate prospects and raise money for the CC
51. Teams: Slide 12
52. Groups of fundraisers that are working together to raise money for your CC
53. These are created via a Smart Query and will be created for you by our SST
54. Major Giving: Slide 13
55. Planned Gifts: Gifts that someone promised to give after they die
56. Opportunities: Large gifts that someone promises to give while they’re alive
57. These appear on your Capital Campaign Page when you assign them a CC designation (more on that later)
58. Naming Opportunities: Slide 14
59. Incentives for people to donate a certain amount in order to receive public recognition of some types
60. For example, if you give $500.000 we will name the library in our Kroc Center after you
61. Snapshots: Slide 15
62. A way for you to access reports that you’ve run from the CC page
63. A way for others to access reports that you’ve run from the CC page
64. If you take a snapshot of a report, you don’t have to go and run the report again to see the results (\*but these reports are static!)
65. Let’s hear from a fundraising expert on how to prepare for a CC: Slide 16 VIDEO

\*Break

1. Getting into IC
2. DEMO/EXERCISE 1: Let’s learn how to LOCATE CC in IC.
3. STHQ SST will set up your Capital Campaign for you.
4. Your job is to use IC to keep track of your CC.
5. Trainer demos three ways to find a CC
6. By Designation: \*May need to remind users what a designation is
7. By Purpose: \*May need to remind users what a purpose is
8. By Campaign Name
9. Exercise 1:
10. Trainees complete 1-3 in Exercise 1 by trying to access a CC
11. \*Remind trainees to use Job Aids as a reference for what the trainer just demoed
12. DEMO/EXERCISE 2: LEARN HOW TO MODIFY A CC
13. Trainer goes into the CC Home Page and first gives and overview of the 4 main sections of the CC
14. Trainer shows how to EDIT a Capital Campaign (ie: Support Services didn’t put in a start date and you need to enter in one)
15. Trainer goes through 10 tabs, briefly explaining what each tab shows/each tabs purpose.
16. Trainer demos how to modify info under 3 tabs
17. GOAL: How to add and edit a goal
18. HIERACHY: You can EDIT a Campaign here as well
19. PRIORITIES: How to add and edit a priority and a subpriority (\*KPIs will be covered later)
20. Exercise 2: Trainees complete 1-5 in Exercise 2.
21. QUESTIONS?

\*Break\*

1. Trainer reviews/demos task in the other 6 tabs (Snapshots is covered later in the Reporting part of the training)
2. DESIGNATIONS:
3. They will just go here to view designations.
4. Setting them up is done a different place and will be completed by the SST.
5. FUNDRAISERS:
6. Trainer demos how to add a Fundraiser, a Fundraiser on a team and a Committee to this CC
7. Remind trainees that these entities need to be set up in IC; this task only allows you to add these pre-assigned entities to your CC
8. TEAMS:
9. Shows the teams you have for this CC
10. Setting up teams involves a smart query🡪SST will do this
11. MAJOR GIVING:
12. Shows prospect opportunities and planned gifts assigned to this CC
13. Will cover how to set up prospect plans with opportunities later in training if they stay for the Prospect Training on Day 2
14. NAMING OPPORTUNITIES:
15. Trainer shows trainees how to see the current naming opportunities
16. Naming opportunities are set up in a different place and trainer will demo that for them later
17. DOCUMENTATION:
18. Trainer demos how to add a note, media link and an attachment
19. Explains that they may want to use these features for the other people that need to see/know information about this CC
20. SNAPSHOTS:

i. Trainer reminds trainees of what a snapshot is, will teach them how to do this later

ii. Trainer demos how to access snapshots by clicking on hyperlink name

1. EXERCISE 2: Trainees complete 6-12 in Exercise 2.
2. Questions?
3. How to add in naming opportunity
4. Trainer demos where to go to add in a Naming Op
5. Trainees can them complete Exercise 13 in Exercise 2.

\*Break

1. Reporting
2. One of the most critical aspects of your CC is monitoring its progress
3. There are many ways to report on your CC in IC
4. Let’s cover the 3 most essential reports and learn how to use the Snapshot feature
5. Trainer explains the significance of each of the 3 reports and demos how to run:
6. Campaign recognition report
7. Campaign priority report
8. Campaign summary report
9. EXERCISE 3: Trainees complete Exercises 1-3 and run these three reports
10. QUESTIONS?
11. SNAPSHOTS
12. Trainer reminds trainees of convenience of having snapshots of reports they’ve run on their CC
13. Trainer demos how to use Report Explorer tool to run a report and take a snapshot.
14. EXERCISE 3, #4: Trainees complete this exercise by running a report in Report Explorer, take a snapshot and then look under the Snapshot tab to ensure they completed this task correctly
15. Questions?
16. IF TIME ALLOWS: There are many other reports that one can run on their CC. See the BlackBaud handout if you’re interested in running more reports. If time allows, trainees can practice running additional reports.
17. IF TIME ALLOWS: We have 1 informative (but long!) video on other tips about creating and running a CC. You can show this to participants if there’s enough time. SLIDE 17: 4 Mistakes People make with CC
18. PROSPECTS AND OPPORTUNTIES
19. \*Trainer will teach Prospects 100 (overview of prospect record) and Prospects 101 (creating a fundraiser, setting up a prospect plan with an opportunity, etc), giving trainees exercises as trainer goes through.
20. Make sure trainer demos how to connect an opportunity with the CC designation so it will show up on the CC Home page, under the ‘MAJOR GIVING’ tab.
21. Make sure trainees do this as well, so they know how to populate a prospect opportunity on a CC page.