

PLANNING A SUCCESSFUL CAPITAL FUNDRAISING CAMPAIGN

An intensive one-day workshop for organisations preparing to raise funds for a major capital project.

For dates and locations please visit www.actionplanning.co.uk/capitalappeals

Raising millions of pounds for a major capital project is a challenge for any organisation and few setbacks are as damaging to the credibility of a charity as a high profile appeal which fails. Some organisations have experienced Appeal Directors on the staff, but most others need to acquire the particular tools and skills required for capital fundraising.

This one day workshop, limited to 30 people, is specifically designed for the chief executives, directors and trustees of organisations considering launching a capital appeal in the next 18 months.

It will help you to decide whether to proceed with a capital appeal and enable you to put in place the resources, research and detailed plans which will enable the appeal to succeed.

We will examine how to plan your project, conduct a thorough feasibility study, identify and profile potential institutional funders and major donors, develop and adapt your 'case for support', recruit and support an effective appeal committee, make a successful 'ask' and implement the private and public phases of the campaign through to completion.

The course is presented by: Robin Thomas and Jason Blackburn from Action Planning's capital appeals team.

"A very interesting day, particularly hearing case studies of successful campaigns."

Benjamin Morrison, Head of Capital Appeals, Jewish Care

"It was impressive to get such a wide range of input from practitioners who really know their subject."

Mary Harvey, Fundraising Director, Notting Hill Housing Trust

"A thought-provoking workshop on what is entailed in running capital appeals."

Sue Hedger, Fundraising Manager, Yeldall Manor

**action
planning** 
let's start from here

strategy and fundraising consultants

REGISTRATION FORM

You can book in three ways:

1. Enter your details online at www.actionplanning.co.uk/capitalappeals (you will then have a choice of either requesting an invoice, or paying online)
2. or fax this form to 020 8770 2090
3. or post this form to **Action Planning**, Waymark House, 19 Cedar Road, Sutton, Surrey SM2 5DA Tel: 020 8642 41220

Please register the following delegates (**BLOCK CAPITALS PLEASE**)

1 Mr/Mrs/Ms/Miss/Dr: _____ First Name: _____
Last Name: _____
Position: _____
E-mail: _____

Mr/Mrs/Miss/Dr: _____ First Name: _____
Last Name: _____
Position: _____
E-mail: _____

2 Name of Charity/Organisation: _____
Address: _____

Postcode: _____
Tel: _____

3 Please indicate your preferred workshop date below:

4 Please tick appropriate box:

I enclose my cheque for _____ (payable to Action Planning)
Attendance fee: £186 per person, including VAT, presentation materials and lunch.

Please register me/us and send me a VAT invoice. (Unless you specify otherwise, the invoice will be made out to your organisation).

I wish to pay by credit card (complete details below)

Visa Mastercard Switch/Maestro Delta

Card Number _____
Valid from _____ Expiry Date _____
Issue No. _____ Security Code _____
Switch/Maestro users only This is the 3 or 4 digit code on the back of your card

5 Please tick the relevant box if you would like a free discussion with Action Planning about our services in any of the following fields:

<input type="checkbox"/> Major Donor Fundraising	<input type="checkbox"/> Research (e.g. into major donors or trusts)	<input type="checkbox"/> Revenue Fundraising
<input type="checkbox"/> Recruitment	<input type="checkbox"/> Strategic Consultancy	<input type="checkbox"/> Market Research
<input type="checkbox"/> Capital Fundraising <small>(Please write below how much you need to raise and for what purpose)</small>	<input type="checkbox"/> Wealth Screening <small>to identify potential major donors</small>	

DATA PROTECTION

We would like to retain your address to send you invitations to future events and information on our work. Should you not wish to receive such communications, please tick here.

We would like to include your name, title and organisation (but not your address) on the delegate list. Should you not wish us to do this, please tick here.

CANCELLATION AND REFUND POLICY

Refunds will be issued, subject to a £30 administrative fee, for cancellations made in writing and confirmed by Action Planning ten days or more before the event. No refunds are available for cancellations within ten working days of the course. Substitutions can be made at any time.

PROGRAMME

Action Planning reserves the right to vary the published programme of speakers and the timing of the sessions.

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Planning a Successful Capital Fundraising Campaign

This interactive one-day workshop is designed for CEOs, directors and trustees in organisations which are considering launching a major capital appeal in the next 18 months. There will be a maximum of 30 participants.

Presented by the Capital Appeals Team at Action Planning, the workshop will help you to:

- **assess** whether a capital appeal is the best means of financing the project
- evaluate whether you have the **fundraising people and resources** you would need
- **engage your Trustees** and other senior level volunteers to open doors, engage interest and **make the 'ask'** for major gifts
- implement a **feasibility study** which establishes how much can be raised from **major donors, trusts, companies and the community**
- develop and test a **persuasive 'case for support'** and then tailor this to the needs of each potential funder
- recruit an effective **appeal committee** and equip members to **secure big gifts**
- see the appeal as an opportunity to achieve a **step change in revenue fundraising**

Action Planning

Action Planning is a leading UK consultancy to the not-for-profit sector. It offers an unparalleled combination of fundraising and strategic consultancy, research, recruitment and 'hands on' fundraising to help organisations grow their income and fund major capital projects. We also provide a Wealth Intelligence service to help charities identify and engage major donors.

An initial discussion with Action Planning is without commitment. Please tick section 4 opposite or contact Vicky Porritt (vporritt@actionplanning.co.uk or 020 8642 4122) if you would like to talk to us about your needs.