

# Capital Appeals

## In-house Training Course

Training your team to undertake a capital appeal



Action Planning's in-house Capital Appeals Training Course helps equip your key staff and volunteers with the principles of how to organise and conduct a capital appeal precisely tailored to the specific opportunities and challenges you face.

Through detailed pre-planning with you prior to the event, each practical one day course is tailored to your precise requirements but could encompass such aspects as:

- **Overview of a Capital Appeal** - Where does a Capital Appeal fit into the broader discipline of fundraising? Understanding the unique features of an appeal
- **Planning process to take the project from inception to implementation** - Overview of the process from feasibility study to completion of the appeal.
- **Identifying and profiling donors who may support the appeal** - Where do we look? Qualifying 'suspects' to become 'prospects'. Who will approach them?
- **Implementing a feasibility study** - The purpose of a feasibility study. What should be included? How to calculate the numbers using the Table of Gifts
- **Developing and testing the 'Case for Support'** - What is the 'Case for Support'? What should it contain? When is it needed? How do we test it?
- **Recruiting an effective Appeal Committee** - The role of the committee. Who should be on the committee? How do we recruit them? What will the committee do? What do you do if you can't get sufficient people to join a committee? What if you can't find an appropriate Chair?
- **Implementing the private phase of the campaign** - Lead donations. Major gifts and the strategy that should be employed.
- **An effective public phase** - The 'mopping up' exercise. How to acknowledge, and how to encourage capital appeal donors to become revenue donors.

Above all, the key to Action Planning's In-House Training Course is its flexibility, focussing on the specific challenges and opportunities facing you and your organisation. We look forward to discussing your precise requirements.

### Recent feedback on Action Planning's training

"It was a thorough and practical workshop - providing the thinking and strategic tools as well as practical mechanisms for running a major appeal of any size"

**Mary Harvey, Director of Charitable Fundraising, Notting Hill Housing Trust**

"A very enlightening and informative day. There were several key issues highlighted that I had not previously considered and these will be invaluable in helping us create a successful appeal."

**Rosemary Fereday, Director, BREAK Charity**

"The day was invaluable in enabling us to formulate a strategy and to break the whole project down into priorities and ordered steps, as well as giving us some vital overarching principles in how we approach the challenge."

**Mike Farrington, Frontline Trust, Liverpool**

"A very interesting day, particularly hearing case studies of successful campaigns, and the opportunity to network with colleagues dealing with the same issues - no matter how large or small the charity."

**Benjamin Morrison, Head of Capital Appeals, Jewish Care**