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Capital Campaign Assignment **Partner Charity: Portage**

Executive Summary

Hardly a week goes by without a major drug-related story in the news. Whether it is a report of a record-breaking drug seizure, the arrest of a high-level trafficker, or news of yet another drug related shooting or tragedy, there is a depressing repetition to the stories.

Drug abuse is a serious problem in Ontario. Not only do drugs harm those who become addicted, they have secondary effects on our entire community. Stealing, lying, cheating, dropping out of school, random violence, prostitution, extortion, death due to overdose or suicide, babies born with drug and alcohol effects – the list of consequences is lengthy. Drug abuse affects the addict, their family, their friends and everyone in the community. And each year, substance abuse costs Canadian tax payers billions of dollars.

Experts agree that one of the most effective means of dealing with drug issues is to remove the demand for drugs; and that treatment is an important part of any demand reduction strategy. Yet, in Ontario we have a severe shortage of treatment programs available for people, and especially youth, with serious drug abuse problems. There is a general shortage of residential beds for youth and lack of programs designed specifically to meet the needs of the increasing number of girls who require treatment.

Portage Elora is unique in being the only centre in Ontario to offer a gender specific program for girls. This program is uniquely sensitive to the very different needs and motivations of young female addicts and has a unique ability to transform participants from drug abusers involved in delinquent and often criminal behaviours into caring, responsible, and productive young women. This unique program is consistent at capacity and our current facilities are inadequate to meet the demand. To address the growing demand and assist more young women, we require a new facility that can accommodate the many women in need of our services. Based on anticipated demand we have established the requirements and initial plans for a building with adequate facilities to deliver our successful program to the growing number of women in need of our services.

The following Capital Campaign Plan addresses each of the 5 phases involved in a capital campaign to raise the necessary funds to build this new facility. This plan outlines our 1.7 million dollar budget, our planning process, gift table, achievements in each phase, measurable targets, and evaluations throughout each of the 5 years. Our goal is to begin moving forward towards establishing the conditions for the successful launch of our campaign called: *The Way Forward*. Since 1985, Portage Ontario has helped men, women and youth struggling with drug abuse find their way forward. This campaign will allow Portage to double the number of women we serve. *The Way Forward* is an ambitious, achievable plan to ensure we can continue serving women in need.

As you will discover in the following pages our foundation planning is strong, tentative targets are in place and there is an urgent need for this project to proceed. *The Way Forward* begins here!

About Portage

Portage is a registered Canadian charity whose mission is to treat and reintegrate serious substance abusers into mainstream society as drug-free, crime-free and productive citizens. Portage has been in operation for over thirty years and has nine treatment centres including one in Elora Ontario which is dedicated to youth. Since opening its doors in 1985, Portage Elora has helped over 4000 young men and women develop the skills and personal competencies they need to live constructive and contributing lives in their communities.

In June 2004, Portage made some structural modifications to its Elora facility and introduced a gender-specific pilot program for youth. In so doing, Portage created a uniquely sensitive and supportive environment for all participants, but especially for young women. Through staff selection and the customization of content and materials to reflect the interests of females the new program has become more understanding of, and responsive to, the specific needs of young women. As a result the program is more appealing to women than the previous co-ed program.

Young women are now coming to Portage in record numbers; they are also staying longer, and an incredible 75% are completing the program – two factors which are known to be indicative of a program meeting the needs of youth clients.

The challenge Portage Elora faces is that the current women's dorm is only large enough, by Ministry standards, to accommodate 10 to 12 females. While make-shift arrangements have been made to squeeze in a few extra beds this is a band-aid solution that is not acceptable on an ongoing basis.

In addition to the issue of overcrowding, the temporary modifications that were made to accommodate the gender-specific program within the main building were intended as temporary. The wall dividing the male and female meeting space does not provide sufficient sound barrier so the separate group therapy sessions are prone to disruption. The common hallways also provide a continual distraction for both communities and create additional “policing” requirements for staff who are already spread thin by the demands of managing two separate communities.

In order to respond to the increasing number of young women who want to participate and to maximize the benefits of the gender-specific program for all participants Portage Elora needs to build a separate residence for young women. Wanting to help meet this need in the community the Portage Board of Directors has determined that the completion of a new residence for young women is the number one priority for Portage Ontario.

Upon completion of the new residence, Portage Elora will have enough beds to accommodate 24 girls at any given time. This is double the existing capacity and will enable 72 girls to benefit from the Portage program each and every year.

Although established in Ontario since 1985, it is only within the past 5 years that Portage began its structured and focused approach to fundraising initiatives. The first step in this process began with the recruitment of Jennifer Blunt. Over the past 5 years, Jennifer’s efforts have increased donations and funding from a few thousand dollars annually to current fundraising revenues of \$300,000.00 for 2007. Jennifer continues to work diligently with the Board of Directors to establish structured and proactive fundraising involvement, acquiring new donors, cultivating

major donors and establishing a solid foundation for their growing Annual Campaign and their future Capital Campaign.

The early efforts to build a solid foundation for a successful fundraising program have successfully reinvigorated and inspired the Board of Directors, increased awareness in the local community, established initial contact with potential major donors and increased support from government and partner agencies capable of supporting a Capital Campaign initiative. Although more time is needed to further cultivate these relationships, recruit staff and further refine Annual Campaign efforts, early evaluations are positive and provide an excellent basis for pre-planning activities for the Elora Capital Campaign.

Campaign Goal – 1.7 Million Dollars

The Goal for the Capital campaign is 1.7 million dollars. We will also set a stretch goal of 2 million dollars, to allow us to fully convert the 1st floor of the dorm to provide additional school space. Initial cost projections and building plans were provided based on 2004 prices and conditions. We have adjusted this pricing to reflect present day costs and added additional campaign and miscellaneous costs which were not included in the previous budget planning.

**Construction Costs** — (as per Edward Thomas Architects)**\$775,000**

This includes construction of the foundation, or full basement, and the framing, plumbing, electrical, drywall, painting, fire and security features for the one story residence. The estimate is based on the completion of a 5,000 square foot building (as per plan) at projected cost of about \$155 per /sq ft in the spring 2006. This budget does not include the estimated \$300,000 to “finish” the basement or lower level of the residence. This will be addressed in Phase Two of the Campaign once the initial construction gets underway.

Related Costs – (as per Edward Thomas Architects) \$115,000

This includes all permits (building, septic, plumbing, etc) and municipal fees, architectural plans, GRCA approvals, and sewage and water hook-up, etc. The estimate is based on 15% of projected construction cost.

Furniture and Equipment \$75,000

The budget includes a bed, table and a storage unit for each resident as well as couches, chairs, entertainment unit with TV and VCR/DVD player for the common room, tables and chairs for the dining room and for the group meeting rooms. If the Canadian dollar remains strong, pricing for these items may be reduced by as much as 10 – 20%.

Finishing Touches \$50,000

Includes landscaping to provide additional screening and privacy as well as an out door patio area; window and door coverings, a gas fireplace for common room, air-conditioning, industrial dishwasher, washing machine and dryer.

Campaign & Staffing Costs \$485,000

Currently Jennifer is the only paid fundraising professional on staff. To allow Jennifer to fully devote her time and attention to the Capital Campaign, Portage will need to hire at least 2 more paid fundraising staff. It is recommended that Portage consider hiring an Annual Campaign Manager and a Fundraising Coordinator, both of whom will also assist in the Annual and Capital Campaigns. The Annual Campaign Manager will spend 75% of their time devoted to their Annual Campaign duties and the Coordinator will divide their

time equally between both campaigns. The estimated expense to the Capital Campaign for these two staff will equal \$168,750. As the Director of Development and lead staff person responsible for the Capital Campaign, Jennifer will be expected to dedicate 75% of her time to the Capital Campaign. Her salary expense to the campaign will amount to \$281,250. The total fundraising staffing costs amounts to \$450,000. Anticipated salaries for each position are as follows:

- Coordinator = \$40,000.00
- Fundraising Manager = \$55,000.00
- Director of Development = \$75,000.00

An additional \$35,000.00 remains in this budget for various fundraising related expenses, including travel, printing, advertising etc. We expect that many of these requirements will be donated and therefore will allow us to keep these expenses minimal. A more detailed budget will be prepared as we progress through the planning phase.

Miscellaneous/Overage Fund

\$200,000

We are budgeting 12% to allow for miscellaneous expenses, unexpected costs and overage.

Total:

\$1,700,000.00

Note re: Stretch Goal

Should our Capital Campaign enjoy a high rate of success, Portage will launch a second phase to cover the cost of completing the lower level of the new residence. This space will be used to accommodate the Portage School which is currently situated in an old building that has little or no natural light and poor ventilation, the school is sadly dilapidating. The plan is to build three bright new class rooms that will also double as extra meeting space for the women. The estimated cost to complete this phase of the project is \$300,000.

The Gift Table

This gift table will help Portage recognize how many primary, secondary and tertiary prospects are needed in order to have a successful capital campaign. The following table indicates the level and number of gifts needed to reach the projected \$1.7million goal.

Portage Gift Table

GIFT AMOUNT	# OF DONORS	# OF PROSPECTS	TOTAL GOAL	% OF GOAL
\$ 250,000.00	2	8	\$ 500,000.00	29%
\$ 100,000.00	3	12	\$ 300,000.00	18%
\$ 50,000.00	6	24	\$ 300,000.00	18%
\$ 25,000.00	9	36	\$ 225,000.00	13%
\$ 20,000.00	10	40	\$ 200,000.00	12%
\$ 10,000.00	10	40	\$ 100,000.00	6%
\$ 5,000.00	15	60	\$ 75,000.00	4%
TOTAL	55	220	\$ 1,700,000.00	100%

Number of Primary Prospects		44
Number of Secondary Prospects		76
Number of Tertiary Prospects		100
Number of Individuals		180
Number of Foundations		20
Number of Corporations		20

Portage Capital Campaign Phases

The current plan anticipates a 5 year capital campaign. The following details the activities, accomplishments, fundraising tactics and targets for each of the 5 phases of the campaign.

The Planning Phase

Accomplishments

- Complete a Case for support
- Specify operation and timeline strategies
- Create a contingency and risk management plan
- Enlist the leaders
- Conduct a feasibility study and review institutional readiness
- Identify campaign committee volunteers
- Identify and cultivate potential volunteers who will participate as campaign leaders and/or work on the campaign
- Identify potential challenges and create a contingency plan
- Determine volunteer hours & number of volunteers required
- Identify the lead donors who will meet 80% of the campaign target

To determine an organization's preparedness for a capital campaign a thorough feasibility study and strategic plan should be developed. During the planning stage, Portage senior staff and board members will participate in a feasibility study which will successfully identify the most likely major donors. This phase will focus on preparation, identification of lead volunteers, campaign committee members and major prospects. This phase will allow the volunteer and staff leaders to

evaluate their commitment to the campaign and begin to develop an initial strategic plan to ensure a successful campaign. Included in this phase is a careful internal evaluation of needs, capabilities and resources to determine the organizations readiness for this major undertaking.

During this stage donations will be encouraged from board members, staff and potential leadership volunteers. Early efforts will focus on engaging the board and encouraging participation in the planning and strategy of the campaign.

Questions to be used in conducting a Feasibility Study

- Why do we need a new dorm?
- Is the case for support compelling? Does it adequately convey the need and benefits for the new facility?
- Are all goals outlined clearly and are they realistic?
- Is this campaign achievable?
- Has the committee decided when and how to launch?
- Is Portage ready for a capital campaign?
- Do we have short range and long range goals? What are they?
- Is there a need for an outside consultant or specialist to achieve our goal?
- Are the employees and lead volunteers well informed, involved & enthusiastic?
- Confidentially, do you know of others in our community that would participate financially in the campaign?
- Who are the top 20 donors who will support 80% of our goal?

After compiling all of the information obtained in the survey into a concise feasibility study, the results are to be reviewed by the board to determine whether or not to proceed with the Capital Campaign. Assuming the board decides to move forward, the campaign committee will use the information in the report to finalize strategic planning.

Campaign targets

The target is to secure 10% of the total goal \$170 000

- Determine whether or not Portage can proceed with the campaign.
- Develop evaluation groups; get commitment from our lead volunteers.
- Develop initial strategy and planning.
- Begin considering and cultivating potential Campaign Committee members and leaders.

Phase two - Cultivation

Accomplishments:

- Select and recruit campaign chair (make public in year 4). Identify other lead volunteers.
- Obtain donations and donation commitments from remaining members of the board, staff, insiders and volunteers.
- Continue building excitement and enthusiasm within the board
- Cultivate lead gift prospects (obtain donations from early lead donors)
- Write and submit grant and foundation proposals
- Generate more media excitement and awareness about Portage
- Prepare marketing materials and cultivate media relationships and attention.
- Ensure all board members, staff and lead volunteers are trained and prepared for solicitation duties.

Fundraising Tactics

During this phase, the campaign committee will begin a stronger focus on cultivating relationships with major prospects. Additionally, foundation and corporate cultivation and proposal submissions will be executed. Lead volunteer and major donor cultivation remains the primary focus of this phase. Donations during this stage are obtained early lead donors, inner circle supporters and staff. Educational events will help to promote Portage and its good works, as well as assist with cultivation and early solicitation gifts. Grant proposals must be submitted. All marketing materials will be developed and prepared. All board members and volunteers will be trained in face to face solicitation and prepared to introduce a variety of giving options, including property and securities. Careful attention will be given to communicating and distinguishing between annual giving and capital giving for donors. This should help to minimize negative impacts on both campaigns and assist in transitioning new donors to support our annual efforts.

Campaign Targets

In this phase the financial target will be \$340 000

- Solicitation of remaining internal donors, current foundation donors and early grants.
- Board commitment and donation, staff commitment and donation and cultivation report.
- Grant proposals written, submitted and marketing materials completed.
- Initial top 20 major donor cultivation targets achieved.
- Lead volunteers and board members thoroughly trained in fundraising practices

Phase three – Quiet Phase-Solicitation

Accomplishments

- Secure participation campaign committee commitments from leadership candidates.
- Recruit at least 50 volunteers to support Active/Public phase events
- 2/3 of the money is raised by the completions of Phase III.
- Establish a strong commitment from major donors and acquire top lead gift
- Prominent supporters execute at least 4 exclusive/private receptions.

Fundraising Tactics

Volunteers are now focused on “making asks” from the earlier cultivated Lead Gift and Major Gift prospects. In this phase volunteers will ask for and secure donations from top lead gifts. All in-house staff and supporters, as well as every board member will have contributed a sacrificial donation. All solicitation during this phase is face to face. All volunteers and staff are focused on sending a clear signal that the organization is committed to its mission, vision and values. Private tours will be provided to top prospects to support ongoing stewardship and build enthusiasm.

Our most prominent and influential volunteers and supporters will host a minimum of 5 exclusive, “invite only” receptions, luncheons and dinner parties to solicit major and significant donations from within their personal networks. We expect to acquire at least 10 significant and/or major donors through these receptions. Further cultivation of these individuals should result in at least 3 more individuals willing to actively become involved in volunteer activities on the campaign. We anticipate these individuals will donate between 10 and 50 thousand dollars each.

Campaign Targets

The financial target for this phase is \$595 000

- Foundation, government and corporate donors will confirm their major gifts
- 5 exclusive private receptions
- 100% Board donations
- A minimum of 5-10 communications and/or visits with each major donor prospect
- Recruit a minimum of 50 new volunteers to achieve public phase goals
- Ensure we are communicating the benefits of securities donations

Phase Four- Solicitation/Active phase

Accomplishments

- Initiate publicity of the capital campaign
- Announce the campaign chair
- Execute gala kick-off event
- Announce leadership gifts and corresponding naming announcements
- Announce the campaign committee
- Top 20 donors solicited providing 80% of donations
- 100% of funding goal achieved by end of this phase

Fundraising tactics

Upon reaching 50-60 percent of our goal, the campaign committee will begin the Capital Campaign public phase. A public announcement launching the campaign will detail the amount of dollars raised and generate enthusiasm. Public response to this media attention should assist in the acquisition of new donors and inspire current donors to offer gifts of significance, as well as additional major gifts. Currently Portage board members are able to secure publicity with The Toronto Star, local newspapers and local television stations. Marketing materials will be distributed. Both media attention and marketing materials will include success stories of past Portage graduates. Where appropriate, our most successful past graduates will accompany lead volunteers and campaign staff on individual solicitation activities and at public events. Face to face solicitations remain a priority in Phase IV. Having completed appropriate cultivation practices, lead volunteers and campaign staff will have “made an ask” and secured commitments from all major donors by the completion of this phase.

We expect that our earlier cultivation efforts in phase two will have generated more opportunities to access media whose reach extends throughout the GTA. Portage has held several successful events over the past two years, raising more than \$300,000.00. The Capital Campaign team will host a large “kick-off” gala event to enhance and further publicize this public launch of the campaign. The goal of this event is to raise funds, maintain enthusiasm, acquire new donors and maximize current donor gifts. Public announcements regarding corporate support, grants, major gifts and naming recognition will continue to inspire public interest, donor involvement and volunteer support.

Finally, Portage will initiate a house list direct mail campaign. This will include information about the Capital project, the accomplishments of the charity and success stories of past graduates and current clients whose progress is notable.

Campaign Targets

During this phase the financial target is \$595 000

- Meet face to face solicitation, stewardship & cultivation goals
- Collect outstanding pledges
- Government matching funds and final grant/foundation monies received
- Gala kick-off event raises awareness and funds for the public launch
- Direct mail is executed and raises \$50,000.00
- Building groundbreaking occurs and receives significant media coverage

Phase Five Wrap up and Closure

Accomplishments

- Collect any outstanding pledges
- Acknowledge and recognize donors
- Continue cultivation for transition to Annual Campaign
- Stewardship Initiatives
- Final Evaluation
- Final record keeping
- Major publicity of goal achievement
- Convert 15% of donors to monthly gift donors
- Convert another 25% of donors to annual donors

Portage will hold a final celebration with significant media coverage to announce the successful completion of the capital campaign and inspire ongoing support for our ongoing annual campaign and potential future capital campaign. Capital campaign staff and volunteers will then transition their duties and responsibilities towards reinvigorating our diminished annual campaign. We recognize that during this capital campaign will have diminished significantly. Stewardship initiatives should focus help to retain newly acquired donors and increased enthusiasm for Portage. Efforts will transition to establish a more ambitious and large scale Annual Campaign plan.

To reinforce our transition with staff and donors Portage will initiate new and innovative stewardship initiatives. A mentorship program is an ideal means of keeping donors involved with the organization and its clients. This program would offer the opportunity for donors to partner with program graduates and act as a mentor. This program will allow donors to continue to see the positive effects of their involvement with Portage and also provides them with an opportunity to become personally and directly involved in the continued success of a Portage graduate.

Stewardship programs like this should help to ensure our Capital Campaign donors remain interested in the work and progress of Portage and the clients we serve. Furthermore, introducing stewardship programs like this will also extend the services of portage and provide staff with new and exciting projects to raise their enthusiasm levels. Finally, these efforts will provide an ongoing reason to maintain contact and communication with donors who might otherwise drift away and/or become engaged in other projects.

Campaign Materials

- Feasibility Study
- Strategic Plan
- Marketing Plan
- Campaign Timeline
- Case for Support
- Gift Table
- 2 New Staff
- Media Releases
- Office Equipment for new staff
- Contingency Plan
- Letters: Appeals, Newsletters,
Thank you, Feasibility
Participation Requests
- Campaign Chair & Committee
- Volunteers (lead volunteers,
event hosts, grassroots)
- Prospect List
- Evaluation Tools
- Brochures
- Success Stories
- Research Data (describe current
research on drug abuse and
modern day deficiencies in
treatment)
- Building Plans
- Budget
- Consumables
- Technology (computers, software,
presentation tools)
- Proposal Templates (to be
customized based on foundation,
government and/or grant
provider)
- Recognition Chart
- Previous Annual Report/s
- Media Kit
- Major Donor Kit (case for
support, success stories, building
information, financials etc.)
- Finalize online donations –
current website does not allow
for “one-click” donating

Evaluation

Throughout each phase of the campaign Portage will consistently engage senior staff, lead volunteers, participants and board members to provide ongoing evaluation to assess our success and progress. All evaluations will include a SWOT analysis to enable Portage staff and volunteers to make appropriate and effective changes to maximize our outcomes. These evaluations will be conducted quarterly and/or yearly. Evaluation participants will be determined based on the specific activity and/or assignment. Additionally, ongoing statistical measurements will be gathered, retained and analyzed to fully measure all quantifiable data. All evaluation reports and quantified measurements will be retained for future use in our Annual Campaigns and potential future Capital Campaigns.

Overall Evaluation

- Monthly progress towards goal (money raised)
- Donor Acquisition
 - Charts indicating number of new acquisitions each quarter
 - Cultivation timelines and targets establishing communications specific to newly acquired donors
 - Communicate data to Annual Manager
- Number of donors upgraded
 - Quarterly tracking of upgrade status
 - Update database and communicate information to Annual Manager

- Number of newly acquired volunteers
 - Quarterly, tracking, donor research data updated and communicated to Annual Manager
- Board meeting efficacy
 - Require all board members to provide feedback on meetings
 - Ask Executive Director and Director of Development to review feedback and make changes where appropriate
- Progress related to gift table
- Review & Assess Target Audience
 - Note any changes to our audience
 - Ask our audience for feedback on communications
- Staff and Volunteer Performance Assessments
 - Research successful Performance Assessment materials
 - Ask staff and volunteers to provide self assessment and collaborate on ways to improve their experience and performance
- SWOT Analysis for each engagement and initiative
 - Provide SWOT forms for every major participant in the campaign
 - Ask them to anonymously submit their feedback
 - Provide group/partner debrief opportunities after every solicitation, cultivation, event and initiative – ensure debriefs begin and end with positive reinforcement

- Cultivation Progress
 - Establish timelines and progress charts for each major donor
 - Establish and follow processes for reporting progress and updating database for both Capital and Annual staff
 - Compare and contrast progress to determine why we are successful and why others are weak

- Public Perception
 - Ask all staff, volunteers, board members, supporters and past clients to obtain feedback from their social networks
 - Provide key questions to determine perceptions in targeted areas
 - Compare and contrast changes throughout various phases of the campaign
 - Ask for feedback from incoming inquiries and donations
 - Use website to conduct brief surveys

- Enthusiasm and engagement levels for all participants, staff and volunteers
 - Have various people inquire on a one-to-one basis to ensure that private opinions represent public assertions
 - Provide anonymous feedback opportunities
 - Observe behaviours, attitudes and body language

Phase I

In addition to ongoing evaluations, phase specific evaluations will be conducted as appropriate for each of the activities within each year of the campaign. The following Planning Phase specific evaluations are recommended:

- Is the feasibility study thorough?
- Are there any surprises in the feasibility study? What are they concerning?
- Is the case for support compelling?
- How many board members will donate in this year?
- Are the Board and Senior Staff enthusiastic and energized about the project?
- Do we have the resources to achieve our Phase I goals?
- Does our strategic plan meet SMART goals?
- Is our contingency plan thorough?
- Should we proceed?
- How will we address diminished donations to our Annual campaign?
- How will this affect Portage's clients?

Each of these evaluations is critical to determining the viability of the campaign and whether or not Portage should proceed with the campaign. Should it be determined that Portage is not prepared to move forward, senior staff and board members will begin working on a preparedness plan to address deficiencies and set a future goal for Capital Campaign execution.

Phase II/Year 2 – Cultivation

- Do we have “buy-in” from staff, leadership volunteers and key supporters?
 - Have peer groups take part in this assessment – people may be more inclined to share concerns and/or hesitance with peers than they are with staff.
 - Provide collaborative opportunities to recommend improvements and take initiative to reinforce ownership in the process.
- Have we met cultivation targets? If not why not? What needs to be done to resolve deficiencies?
- Are all grant proposals written and submitted? Are their new/additional grant opportunities available to us?
- Have all projected donation targets been met? If not, why not? How do we address shortfall and prevent future shortfalls?
 - Revisit contingency plans if necessary.
 - Consider halting process or extending campaign if contingencies are insufficient to address challenges.
- Have all media cultivation efforts been achieved?
 - How many new media contacts have we made?
 - How interested did they seem in our project?
 - How close are our linkages to these people?
 - What resources can we offer them to fulfill WIIFM requirements and maintain ongoing interest and communications?

- Are all marketing materials complete? Are they compelling? Do they speak to our target audiences? What, if any, changes should be made?
 - Share materials with fundraising professionals in other organizations and ask for feedback.
 - Ask volunteers to show materials to friends, colleagues and perhaps even marketing professionals in their organizations to collect feedback.

- Have we selected and received commitment from our Campaign Chair?
- Are we meeting timelines and benchmarks?
- SWOT Analysis for each of these areas.
- Are all individuals involved in upcoming solicitations prepared, trained and excited about the process?
 - Role play with other senior staff and volunteers.
 - Conduct brief tests on technical issues such as securities, tax rates and property issues.
 - Partner experienced staff and volunteers with less experienced staff for initial cultivation, stewardship and cultivation meetings to allow them to observe the process. Allow the new volunteers to take a lead role in these meetings after initial observation meetings.

- Revisit SMART goals for next phase and adjust plan accordingly.

Phase III/Year 3 Evaluation – Solicitation

- Have we met the 2/3 goal? If not why not? How do we adjust our plan for year 4 given our shortfall?
- Were private receptions financially productive? Did we acquire substantial new donors? Was the reputation of Portage enhanced by these private events?
 - Ask volunteers to obtain feedback and report back
- Have we met volunteer recruitment target?
 - Are our recruiting methods and efforts reaching the kind of volunteers we need? If not – why not?
 - Ask successful and enthusiastic volunteers for input and suggestions to improve our efforts.
- Do all key players remain enthusiastic and positive?
 - If not, why not? Are we thanking our volunteers enough?
 - Are we asking too much of too few?
 - Ask other charities how they reinvigorate staff and volunteers.

- Should we proceed with the public phase? If not – what alternative plan should be implemented?
 - How do we maintain the confidence of the key players who have committed their time and resources to us over the past 1 – 3 years?
 - Can we proceed on a smaller scale?

- SWOT Analysis of all year 3 initiatives.

- SMART Assessment for next phase.

Phase IV/Year 4 Evaluation – Active Phase

- Did we achieve 100% of goal?
 - If not do we extend the campaign or reduce our look for ways to build on a smaller scale?
 - How will this effect public perception as well as key constituents?
 - Are their government options available to us that will enable us to meet our goals?

- How accurate was our gift table?

- Did donors provide the gifts anticipated? Who pleasantly surprised us? Who disappointed us?
 - What factors lead to our inaccurate expectations?
 - How will this effect our annual campaign and future capital campaigns?

- Did we generate enough media attention? How did the media attention impact our campaign and public perception of Portage?
 - Ensure all media releases provide unique identifiers to track responses. (unique phone numbers or contact information)
 - Ask all donors and incoming communications where they heard about our organization and/or the campaign.
 - Use survey monkey to conduct surveys of everyone who indicates they were referred by a media or marketing product.

- Event evaluation and SWOT analysis – consult participants as well as staff and volunteers.
 - Ask event participants to fill out brief survey while still at the event
 - Ask all volunteers to provide written feedback.

- Did naming opportunities enhance our ability to acquire new donors and maximize major gift opportunities from both new and current supporters?
 - How many individuals inquired about naming opportunities?
 - How many of those who inquired donated? And how many donated at a naming level?
 - How many individuals took advantage of naming opportunities?

- Was the direct mail successful? If so, why? If not, why not? What can we learn from the direct mail campaign that will be helpful in the future?

Phase V/Year 5 Evaluation – Celebration, Wrap-up & Transition

- Were our Campaign Chair and Committee members effective in each of their roles?
 - What strengths did each individual bring to their roles and the campaign?
 - What weaknesses impacted their roles?
 - How can we continue to engage them in the future and take advantage of their strengths?

- Did our celebration receive adequate media coverage and convey our success to the public?
 - Which media covered it?
 - How many of these media representatives were actively cultivated by us?
 - Use Survey Monkey every single donor and volunteer for feedback.
 - Ask people to informally inquire about the media coverage with their friends, associates and colleagues to determine what they may have seen and/or observed in the media.

- Ensure all monies are collected and bookkeeping is balanced.
- Did board members and other significant volunteers meet expectations?
- Did we meet our campaign goals – both financial and non-financial?
- Did we meet our timeline goals in this and every other phase?

- Are any tasks left incomplete? If so why? Establish firm timeline to clean up loose ends.
- Assess all quantifiable data regarding donor acquisition, donors upgraded, and volunteer acquisition and categorize data to enhance future campaigns?
- Assemble & correlate evaluation reports from each phase to review findings and make transition recommendations.
- Have all donors received thank you communications and recognition rewards?
- Conduct SWOT analysis on overall campaign outcomes as well as phase 5 efforts.
- Evaluate staff needs for transition to new roles.
 - Involve staff in this process to ensure positive attitudes and security in their value to the organization.
- Establish SMART goals for transition initiatives.

Appendix A



Appendix B

