

Smart Campaign Timeline

CAMPAIGN ACTIVITIES	MONTH					
	1	2	3	4	5	6
Conduct feasibility study orientation meeting with organization						
Wealth screening of 300 individuals for feasibility study						
Conduct Smart Campaign orientation meeting						
Wealth screening of 1,000 individuals for campaign management						
Analysis of wealth screening for feasibility study						
Confidential workshop to conduct peer assessment with organization to prioritize donors based on the wealth screening analysis for possible feasibility study interview						
Prioritize and select potential interview candidates						
Provide interview dates to organization						
Develop customized survey						
Determine final list of potential interview candidates						
Develop campaign gifts chart						
Fundraising and mentoring coaching to organization Board & Staff						
Begin solicitation of board members for a campaign gift						
Draft preliminary case for support						
Board campaign orientation						
Send feasibility study interview requests						
Schedule feasibility study interviews						
Send feasibility study confirmation letters						
Conduct feasibility study interviews						
Monthly meetings with organization board & staff regarding study progress and campaign management						
Begin solicitation of board members for a campaign gift						
Identify list of top 20 campaign donor prospects and determine appropriate cultivation steps (cultivation event, one-on-one meeting)						
Host campaign cultivation events and one-on-one meetings						
Identify and recruit prospective campaign committee						
Identify and recruit prospective honorary campaign committee						
Develop initial campaign budget						
Analyze feasibility study findings and prepare report						
Draft campaign fundraising and marketing plan including cultivation and stewardship plan						
Present preliminary feasibility study report						
Publish final feasibility study report						
Refine and finalize case for support						
Refine campaign plan						