

Handout 5.03: Capital Campaign Prospect analysis and Gift Tables*

Assessing potential to give for prospects:

Developing these tables will help you understand if you have a big enough pool, or 'pipeline' of potential donors for you campaign – totalling up the high and low projections will illustrate how close you might be to achieving your goal, and how much further work researching and developing prospects you might need to do.

1) Current donor analysis table:

Start with what you know – donations and award from current supporters. This table is relatively straight-forward to complete, you just need to check files, finances etc. to collate the information.

Name	Last gift – date, amount, purpose	Total giving and focus	Low campaign projection: £ / purpose	High campaign projections: £ / purpose
Donor A				
Donor B				
Donor C				

2) Prospective donor analysis table:

Next think about prospects. It is probably easiest to start with Lottery (HLF) and Trusts and Foundations since many publically advertise what awards are available and information on other organisations funded is in the public domain. Next consider companies and finally individuals. The latter takes the most time because this involves research – you may need to:

- Prospect screen your database / contacts list,
- Carry out a stakeholder analysis to map contacts with Trustees, Friends etc.
- Undertake desk research
- Commission a dedicated agency to create a list of potential prospects based on information in the public domain.

Name	Interests / connections	Assets / gifts to other organisations	Low campaign projection: £ / purpose	High campaign projections: £ / purpose
Prospect A				
Prospect B				
Prospect C				

These tables look at individual donors, if you have a large campaign develop separate tables for:

- Individuals
- Trusts and Foundations
- Businesses
- Government / Local authority grants

Using potential donor figures to produce a Gift Table:

Gift tables show you what work needs to be done to meet your fundraising target – you may need to identify more large gifts, and/or increase Trustee capacity to ask for larger gifts. You may not be able to identify gifts at some levels and so need to rebalance by seeking more large or medium sized gifts.

In the example below an identified potential £1m donor means that work engaging this one person alone could lead to the campaign achieving 25% of its goal. If success can also be achieved with the two large funders capable of awarding £500,000 each then the campaign will have achieved 50% of its target. This campaign envisages a small number of gifts at high levels.

Example Gift Table #1 - Fundraising goal = £4m

1 gift @ £1,000,000	Total £1,000,000
2 gifts @ £500,000	Total £1,000,000
3 gifts @ £250,000	Total £750,000
10 gifts @ £100,000	Total £1,000,000
10 gifts @ £25,000	Total £250,000
Total gifts	£4,000,000

But donor research might tell a different story and mean the table, and hence campaign, needs to be structured a different way:

Example Gift Table #2 – Fundraising goal = £4m

8 gifts @ £250,000	Total £2,000,000
10 gifts @ £100,000	Total £1,000,000
20 gifts @ £30,000	Total £600,000
25 gifts @ £10,000	Total £250,000
many gifts @ £1,000 - £4,000	Total £150,000
Total gifts	£4,000,000

In this case more work needs to be done with more people/funders at lower giving levels.

Developing one or more tables to match potential giving identified at the donor research stage, and revising in light of progress, will help you understand where you need to target effort and will inform your capital fundraising strategy.

*Examples based on tables provided in *Capital Campaigns* (2006), Trudy Hayden, DSC. – A short and highly readable book providing an excellent overview on running campaigns.