



EmbarkSM Capital Campaigns

Embark Capital Campaigns get you where you want to be...in a new house, enjoying a major renovation, retiring debt or endowing scholarships. Let OmegaFi's seasoned, fundraising professionals personally structure a campaign management and marketing program tailored to fit your specific needs, budgets and objectives.

Embark. Don't start a campaign without it.

Campaign Management

During your Embark Capital Campaign, OmegaFi manages the time, talent and energies of many of the people who will be instrumental in your success while performing the following functions:

- Develop and implement the strategy, theme, timeline and detailed plans for a successful campaign
- Assist in identifying those alumni who have the ability to donate at the top levels, if properly motivated, and determine the "right" individual solicitor
- Personally visit any particular donor prospects and solicit these alumni, where it is determined that OmegaFi is the best one to do so
- Identify, recruit, cultivate and solicit key leaders and other volunteers needed to successfully complete the campaign, including, but not limited to, the positions of national campaign chair and vice chair, major gifts committee leadership and other committee members
- Conduct training and orientation meetings
- Recommend campaign policies related to tax deductibility, gift acceptance, confidentiality, etc.
- Develop donor recognition policies, such as:
 - » setting giving level amounts and names
 - » sending thank-you letters to all donors
 - » making recommendations about room naming policies, among other suggestions
 - » incorporating an engraved bricks component, if appropriate
- Coordinate and develop policies for using your national or another 501(c)(3) charitable foundation to receive gifts for a scholarship endowment and any other educational aspects of the campaign
- Constantly administer professional advice and assistance to campaign leadership and volunteers, enabling the former to devote their valuable time and energy to make policy decisions and freeing up both leaders' and volunteers' time to solicit funds
- Coordinate campaign efforts with any college, university or national headquarters' foundation, as authorized and requested by you
- Provide regular and detailed reports to campaign leaders and volunteers

- Help organize, plan and arrange the phone-a-thon undertaken in the "wrap-up" phase of the campaign
- Help organize, plan and arrange key campaign meetings with alumni and the active chapter
- Regularly report campaign progress in writing
- All Embark Campaign clients enjoy the features and benefits of Embark Fulfillment, if desired

Campaign Marketing

In marketing your Embark Capital Campaign, OmegaFi develops a strong case for support by strategically translating your needs into donor benefits and opportunities. To do this we:

- Design and implement the marketing program to promote the campaign to alumni and other key constituents using direct mail, email and online sources
- "Concept" the campaign, and write its case for support
- Draft and design various campaign mailings and materials, including the theme and logo, a brochure, letterhead, stationery and envelopes, pledge cards, volunteer kits, inspirational and informational direct mail packages and direct mail solicitation appeals
- Print and send all campaign mailings and recommend mailing dates as OmegaFi deems appropriate
- Prepare and mail all campaign materials and packages, including attending to all mail house functions (folding, inserting, sealing, stamping, etc.)
- Develop a campaign website to recognize all donors, communicate campaign information and allow alumni to make online pledges at the appropriate time



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Program Terms

- Watchdog groups and professional associations have different recommendations and methods for calculating fundraising fees that vary from a maximum of 25 - 35%. An Embark campaign fee is typically 8 - 10% of the campaign goal. By way of example, a \$1 million campaign costs \$80,000 plus expenses with OmegaFi.
- OmegaFi subscribes to the standards promulgated by the Association of Fundraising Professionals and does not work for a percentage of campaign funds raised.
- Expenses are billed monthly.
- EmbarkSM Alumni Relations' conversion, licensing and monthly fees waived during an Embark campaign.

Leading charity watchdog groups, like the Better Business Bureau Wise Giving Alliance and American Institute of Philanthropy, both say that charities should spend no more than 35% of their campaign contributions on fundraising costs. The Standards of Excellence Institute recommends no more than 33% be spent on fundraising costs. Charity Navigator recommends a maximum of 25%.

The Growth of a Capital Campaign

1. Key leaders are the seeds of a campaign and must enthusiastically commit and decide to go forward.

2. Campaign committee members provide roots to the campaign, agree to serve, and make their own pledges.

3. Major gift prospects are critical and provide the support structure and a majority of campaign funds.

4. The Campaign is in full bloom when all other alumni have an opportunity to contribute.

