

## The Ingredients for Campaign Readiness

Take a moment and recall the best meal you ever experienced. Maybe it's your grandmother's breakfast or a meal at a five-star restaurant. For any meal you recall as memorable, it's likely the chef didn't follow a recipe. Because master chefs know the ingredients they need to mix together to create a scrumptious experience, and they rely on their skill and expertise to guide their vision in creating a truly unique (and delicious) result.

For more than 70 years, Gonser Gerber<sup>LLP</sup> has provided counsel to nearly one thousand organizations/institutions in guiding campaign fundraising efforts. Through these experiences, we have identified the critical ingredients that, when properly mixed together, will lead to a more successful result. Understanding these ingredients cannot be uniformly applied, we present to you the 10 essential ingredients for campaign readiness. Your unique mix will become clear as you view these ingredients through the lens of your organization's preparedness.

### Why is "Campaign Readiness" Important?

Historically, the primary ingredient – for many, the only ingredient – used when preparing for a campaign has been "feasibility." While this term has come to adopt different definitions over the years, its original intent focused exclusively on assessing the amount of possible gift support available to an organization considering a campaign. In other words, "campaign feasibility" served as a testing of the external philanthropic marketplace and was specifically designed to answer the question, "Is there gift support sufficient to achieve our campaign fundraising goals?"

Answering the question of campaign feasibility is, of course, important. However, it isn't the only ingredient to measure when preparing for a campaign. While some organizations still focus primarily on answering the question of feasibility, our firm's experience has shown that it is just as important to consider a broader set of ingredients aligned with preparedness.

Campaign preparedness asks a different set of questions, and the unit of measurement is different. Instead of exclusively assessing the external environment like campaign feasibility does, questions of campaign preparedness also look within the organization and ask,

"How well positioned is the organization to invite, receive, and steward the gifts that will be given?"

Taken together, an approach focused on feasibility and preparedness offers a more comprehensive and thorough level of preparation for a campaign. The ingredients needed for success are based on this foundation of campaign readiness.

## Campaign Readiness: 10 Essential Ingredients

We have found there to be 10 essential ingredients that, when properly measured and mixed, lead to greater overall campaign success.

**Campaign Readiness Ingredient 1:** *Mission, vision, and values statements that are authentic, clear, timely, and inspirational.*

Your statements of mission, vision, and values should reflect the soul and the aspirations of your organization. Can members of your staff and volunteer teams articulate your mission quickly and clearly? A well-crafted mission statement addresses your organization's purpose and, as the *Stanford Social Innovation Review* suggests, can be "eight words or less."

Does your organization have a vision statement? If so, does it inspire those already connected to your organization and help you attract new donors and volunteers? An inspirational vision statement can help donors grasp the ideal future your organization is aiming to create for the betterment of those you serve. By clearly defining the destination of your plans, you can invite donors on a journey in a compelling and winsome way.

Your statement of values should communicate what you believe and how you strive to engage and work with others. While no organization is perfect, your values should resonate with a ring of authenticity. For example, if an organization lists as a core value the notion of "transparency," and, yet their culture is one of secrecy, they should not be surprised when donors, volunteers, and potential employees are slow to partner with them.

Finally, these statements should provide a clear framework for helping to answer the important question, "Why are we attempting to raise significant gifts during this campaign?"

Often, a donor's decision to make a significant campaign gift is driven more by the impact of that gift and less by the recognition or "benefits" they will receive from having made the gift. Donors ask, "What will my gift do?" Authentic, clear, timely, and inspiring statements of mission, vision, and values help answer that question and animate the giving impulse.

**Campaign Readiness Ingredient 2:** *Campaign initiatives that are properly aligned with your mission, vision, and strategic plan.*

Campaigns need a clear MVP. We're not talking about a Most Valuable Player in this instance. Instead, we are referring to the alignment of your mission, vision, and plan. The specific fundraising priorities for your plan must be aligned with your mission and vision.

When organizations align their campaign funding priorities with a compelling strategic plan, they are answering the question, "Why are we raising money for this project or that initiative and not another?" The answer to this question becomes important because major gift donors want to be assured that the list of campaign priorities is not simply a laundry list of organization needs. Instead, donors want to see that campaign priorities have been strategically chosen and offer the best possible path toward achieving the strategic plan goals and, ultimately, the mission and vision of the organization.

When campaign priorities and goals clearly link to your MVP, donor giving is often elevated because it is clear how the gift will be used.

**Campaign Readiness Ingredient 3:** *A dedicated board committed to the success of the campaign.*

There is a saying that our firm often affirms for client organizations: "No organization can be better than its board." Accordingly, this question should be answered for any organization considering a campaign: "Is our board ready to provide the requisite leadership for this campaign?"

Board campaign leadership primarily comes in two forms. First, it comes through a process that ends with the board affirming that the campaign is not only something that the organization should do, but that the campaign is something that they own.

As the governing body of the organization, the corporate board must adopt a disposition of ownership with respect to the campaign.

Of course, they aren't responsible for giving 100% of the goal. But they are responsible for seeing that 100% of the goal is achieved. Do members of your board talk about the campaign as "ours" or do they use "your campaign," or "their campaign?"

Second, boards must provide philanthropic leadership to the campaign. In almost every instance, campaign success starts at the top of the organization with board giving. If the board is willing and able to commit 20% to 30% of the total campaign goal, the organization is starting the campaign in a strong position.

**Campaign Readiness Ingredient 4:** *An engaged group of key volunteers.*

The importance of volunteers in a campaign cannot be overstated. In many instances, having a volunteer open the door to a new prospect or involving a volunteer in a gift invitation meeting is the difference between success and disappointment. Volunteers add a voice of authenticity to our campaign. They affirm to other donors and prospects that our organization is worthy of support, and they encourage others to give at higher levels.

Engaging volunteers, though, much like cultivating major donors, does not occur overnight. Assessing your organization's experience with volunteer involvement is important. Have we engaged our volunteers meaningfully in past campaigns and development efforts? Have we provided them with specific responsibilities and supported them appropriately? And, just as importantly, have we engaged as volunteers those individuals who bring sufficient influence and affluence?

**Campaign Readiness Ingredient 5:** *Major donors who are well-informed and have a positive perception of the direction of your organization.*

In a previous Campaign Readiness Study our firm conducted, one clear finding was that some of the organization's most important major donors were not aware of a significant and recent expansion of the organization's mission.

This strategic change was spotlighted in a preliminary case statement that prospective donors reviewed during the study, and it surprised many of them. Accordingly, these donors were less enthusiastic about supporting the campaign with their best possible gifts, and the organization was going to be hard-pressed to realize overall campaign success.

Before moving ahead with a campaign, it is wise to check the pulse of your valued constituents. Do they understand the direction and goals of the organization? Are they more engaged or less engaged psychologically than they were a year ago? Do they use the word “we” or “they” to describe the organization? Answers to these questions begin to give a sense of the perception of your organization.

**Campaign Readiness Ingredient 6:** *Recently successful fundraising efforts.*

While it is important to analyze all annual, planned, and major gift fundraising programs and clearly understand how effective those programs are, there are three specific questions an organization should ask about past fundraising efforts when deciding how campaign-ready they might be.

First, what is your history of campaign success? The nonprofit landscape is full of organizations that publicly launched campaigns but did not meet fundraising goals. In those instances, it is not uncommon for leaders to shy away from a subsequent campaign. Although the best response to a failed campaign is to follow-up with a successful one, sometimes a public campaign failure can inhibit decision-makers for years or even decades! Conversely, when an organization has a history of campaign success, a typical response to the idea of a new campaign is, “How quickly can we get going?” Those associated with successful campaigns are more eager to experience the good feelings of the campaign again.

Second, is there a recent history of major gifts that support strategic priorities? These five-to-eight-figure gifts are vital during the campaign’s quiet phase to create early momentum and movement toward launching the campaign’s public phase.

The third question to ask about past fundraising success involves the number of leadership-level annual giving donors.

Specifically, if your organization has enjoyed an increasing trend of annual leadership-level donors – say, at the \$1,000 level – then campaign success is more likely to be in store. This is because during the public phase of the campaign, smaller major gifts will need to be secured. The pool of donors, who today are providing leadership-level annual gifts, will be the pool of donors from whom those smaller (but important!) major gifts will come during the public phase. Expanding this group of major gift donors is a key part of overall campaign success.

**Campaign Readiness Ingredient 7:** *An optimized development office.*

The capacity of the development office to manage the internal operations of a campaign is a critical ingredient for any organization considering a campaign effort. While it is easy to think of this issue strictly in terms of the human resources needed to be successful in a campaign (i.e., do we have enough people out asking for campaign gifts?), there are also other important areas of development office capacity worth exploring.

First is the area of policies and procedures. Is there a governing board-approved policy on gift acceptance? Ultimately, who determines in your organization if a gift will be accepted? And what types of gifts will be accepted? Answers to these questions can be critical during a campaign when, for example, a prospect offers to gift a parcel of swampland in Florida that may be difficult to liquidate.

The second area of development office capacity worth exploring focuses on your organization’s ability to identify and research prospective donors and manage known prospects and donors. During a successful campaign, your organization will be making significant gift invitations of your major donors during a compressed time period. In this context, having a better understanding of prospective donor financial capacity and interests, and being well-organized and strategic in the process of inviting a gift from your major donors, will be key.

One of the biggest complaints we hear from major donors is that the organization asks them too often for smaller gifts, instead of conducting gift planning with them – that is, inviting them once annually, or once during a campaign effort, to consider a comprehensive package of gift options (to potentially include annual, major, and planned gift considerations).



The third area of development office capacity worth exploring is the donor relations function. Specifically, how prepared is your organization to receive, thank, and recognize major donors? Do you have naming opportunities prepared? Is there a donor stewardship plan in place?

Are there staff members who are charged with ensuring that donors receive as much attention after the commitment has been made as they did during the cultivation process? Successful campaigns beget future successful campaigns. The organizations that understand this recognize the way we steward today's gift will help determine the size of tomorrow's gift.

The final area worth assessing is the budget. Campaigns must be properly resourced to be successful. Accordingly, this may require an enhanced budget potentially for more staff resources, but also for more travel, print/digital messaging, campaign awareness events, and materials (among other considerations).

**Campaign Readiness Ingredient 8:** *Effective marketing and communications efforts.*

When properly implemented, campaigns should support and affirm the broader organization brand. To achieve this campaign marketing goal, your organization's communications and marketing efforts must be well-organized, strategic, and integrated with the campaign.

The name of the campaign and the themes that support the campaign should reflect your overall organization brand and inspire donors to be more generous.

Additionally, while donors do not make decisions about their campaign giving based on the design excellence of campaign literature, the organization must have the capacity to produce the needed campaign collateral – both digital and hardcopy. Effective communication and marketing efforts, in all forms, help to create the environment within which generosity is encouraged.

**Campaign Readiness Ingredient 9:** *A strong partnership between the development office and the executive director/CEO.*

The most important relationship in any campaign effort is the one enjoyed by the chief development officer and the executive director/CEO. Do these two individuals

work well together? Are they meeting regularly and discussing donor cultivation strategies and future prospective donor meetings? Are they both fully committed to the campaign and willing/able to give the time needed with donors and prospects to be successful? If the relationship between these two positions is not strong, the campaign has little chance of being successful.

**Campaign Readiness Ingredient 10:** *A campaign goal that aligns with the interest, enthusiasm, and philanthropic capacity of your donors.*

It is informing that the last ingredient is "feasibility." This does not suggest it is unimportant. To the contrary, if your donors do not have the capacity and interest to support the forthcoming campaign at the level you desire, then your campaign will be unsuccessful. However, it is our firm's experience that when the previous nine campaign readiness ingredients are measured and found to be acceptable, feasibility is usually measured and found to be acceptable.

The process of setting the dollar goal for your campaign must be informed by understanding the interest and financial capacity of your donors. While your organization may have \$250 million worth of needs, you will not raise that much money if the donors who are ready to be solicited can give a total of \$50 million. Clearly understanding your donors' interests, enthusiasm, and financial capacity helps ensure your campaign is feasible.

## Conclusion

Campaigns are exciting times in the history of any organization. They hold the promise of a brighter future, and they energize people in new and important ways.

Assessing your organization using this list of campaign readiness ingredients will help you measure how prepared you are and how feasible your campaign effort might be. And, when you take the time to apply each of these important ingredients – at the levels needed for your organization – you will strengthen not only your chances for campaign success, you also will strengthen your overall development program.

We wish you the equivalent of "executive chef" status as you mix your ingredients into a campaign masterpiece.