

## Preparing for A Campaign

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There is nothing more exhilarating than a winning capital campaign. The support of your donors; the funds being raised and what it will mean to the organization. It truly is the pinnacle of fundraising.



A campaign raises a specified amount of funds necessary to meet an urgent, critical need over a defined period of time and in a methodical, highly structured fashion. It is unique in fund-raising strategies and works because it is so highly defined and organized.

There are three critical elements necessary to undertake prior to launching a campaign:

- Preparation of the Case for Support
- Pre-campaign planning
- Conducting the Campaign Feasibility Study

### Case Statement:

A Case Statement is the official reason, description and plan you use to tell donors your story and enlist their support. It is an educational tool about the programs you offer, your vision for the future and a logical argument for eliciting support for your vital initiatives. In other words, a Case Statement is most like a pro forma of a business, detailing the vision, the opportunities, the strategic objectives and the required financial resources to make that vision a reality. The preparation of The Case for Support will occur simultaneously with the pre-campaign planning.

### Pre-Campaign Planning

In any successful fundraising effort, the identification of potential donor prospects is of paramount importance. Most campaigns require a relatively small number of gifts – and it is critical that the largest gifts be solicited first. Campaigns succeed based on the qualification of major donors. Who your lead donors are should be evaluated based upon a gift table. Therefore, it requires diligence and careful review to prepare the best “prospect list”. The preparation of a major donor prospect list can be obtained by using the following methodology:

#### 1) Initial Prospect Identification:

- a. Analysis of current donor base to identify best major and consistent donor support
- b. Friends and associates of members of the Board who may have an interest in the mission
- c. Individuals (including private foundations) who have been aligned with similar causes

- 2) Rate & Review Sessions. These sessions involve members of the Board, usually in a social situation, where they confidentially review lists of potential donors and, through facilitation, identify the best prospects for the campaign.

The goal is to identify 30-50 “best donor prospects” who can provide the early “leadership” support for the campaign. These are the donors who will be asked to participate in your feasibility study. While this will constitute your initial donor list, donor prospect lists are continually expanded throughout the campaign by eliciting new names from individuals who have given support and new individuals who may self-identify during the process of the campaign.

The more time and preparation spent during the pre-campaign phase usually means a better outcome for the feasibility study. It is during this time period that donor research (including the application of wealth engines) should be initiated. Danosky & Associates frequently works with its clients during this critical phase to ensure a smooth feasibility study and that the proper groundwork for the campaign is laid.

### Campaign Feasibility Study

A fundraising feasibility study is a tool used by organizations to determine if their proposed fund-raising campaign, and the project for which they are raising funds, has the requisite support of the community for it to be successful. Using a very methodical and deliberate process, you are able to assess how much money an organization can reasonably raise, how long it should take to do it, and what steps need to be taken to ensure success. A good study will also identify potential leaders and donors, strengths and weaknesses of the project itself, and will include recommendations on how the campaign should be conducted. It is also the first step in the cultivation and solicitation of the major gifts required for the campaign to be successful.

A campaign feasibility study is best conducted by an experienced, objective outside consultant. It consists of a series of confidential interviews with the organization's board and staff, key supporters, opinion leaders and prospective major donors about their interest, willingness and capacity to support the campaign. It also asks critical questions concerning the project itself – and measures the perceptions that individuals throughout the community may have about the project. Sometimes during the feasibility study we find there are misperceptions about the project which can be addressed through effective outreach and communication. Occasionally, the study may identify a pivotal issue which should be resolved before the organization moves forward.

The feasibility study specifically tests the following essential elements needed for a campaign to be successful:

- An urgent, compelling case for support;
- A clear justification of your organization's needs;
- The community perception of your organization and the project you are proposing
- Sufficient donor and volunteer prospects within the organization's constituencies;

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- Effective leadership to carry out the campaign and the projects' goals;
- Adequate resources to move forward such as staff, funds, facilities and technology;
- A strategy for implementation of the campaign

Upon completion of the feasibility study, the consultant provides a candid, honest and confidential assessment of the strengths and weaknesses of your project, and the key success factors required for a successful fund-raising initiative.

### Methodology

When Danosky & Associates conducts a feasibility study we use the following methodology:

- Work with Board Leadership to define the feasibility study objectives
- Assist in the selection of those individuals who will be interviewed
- Develop the key questions to ask during the survey
- Prepare letters that will be sent to those who will be interviewed personally
- Conduct a requisite number of personal and confidential interviews appropriate to the suggested campaign goal
- Provide comprehensive analysis of the findings and present those findings to management, Board Leadership and the entire Board of Directors
- Recommend a plan of action based on the findings of the study – either to proceed with a capital campaign or other alternative strategies, if necessary.

### Time Line

The timeline for implementing a campaign can vary widely, depending on the organization's readiness to move into campaign mode. Pre-campaign planning is essential – which can take anywhere from three to nine months. During this time the campaign case for support is developed and donor prospects are identified.

A feasibility study can take anywhere from 3-4 months, assuming the pre-campaign work has been completed. If the pre-campaign planning was not as intensive this could require a longer timeframe. The actual timing of activities is often dictated by circumstances not always within an organization's control. Factors such as the availability of data and information to evaluate the case and donor lists, the accessibility of Board/Steering Committee members to meet and the availability of individuals to participate in the study, all impact the timeline.

### Conclusion

Campaigns are the most effective way to raise significant funds in a relatively short time period. They may be compared to a marathon – adequate training and preparation are essential, and an organization is wise to pace itself for the significant reward that comes from finishing the race. A consultant can serve as your trainer and coach as you begin to embark on an initiative that can be transformative for your organization.