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12 COMPONENTS TO PLANNING FOR A SUCCESSFUL CAPITAL CAMPAIGN **BRUCE D. THIBODEAU, PRESIDENT AND DANIEL J. ZANELLA, SENIOR CONSULTANT**

All major endowment and capital fundraising campaigns share a number of common characteristics that are critical to their success. A *Campaign Planning Study*, sometimes called the "Feasibility Study," determines the extent to which these characteristics exist for an organization in advance of undertaking a full capital campaign. Information gathered during the planning stage allows an organization to make appropriate adjustments before beginning work in earnest on any endowment or general capital campaign. It also allows for a strategic campaign plan to be drawn that will likely ensure its success. The study may likewise alert an organization that more preparatory work is needed before launching a campaign. Finally, it can help "pre-sell" a campaign to prospective donors, thus laying the groundwork in advance of the actual request for contributions. With those issues in mind, twelve of the most common characteristics that need to be evaluated in planning for a successful campaign include the following:

1. A POSITIVE INSTITUTIONAL IMAGE

Prospective leaders and donors must personally identify with the project and institution involved, viewing its needs as their own. There should be confidence in the board and key staff leadership, a high level of identity with, a personal sense of ownership of, and enthusiasm for the organization's mission, vision, and needs.

2. A GENUINE AND IMMEDIATE NEED

The organization must demonstrate a genuine need for the proposed project to the donor community. This involves a thoroughly credible case for the amount of money sought, as well as a thorough justification for the need itself. In selling any product, the customer (prospective donor) wants to know what he or she is buying (giving for), what need(s) the product will satisfy, what it will cost, and if it is a good value in satisfying the needs in a cost-effective way.

3. A TOP PRIORITY FOR DONORS

The personal priority that the donors will place upon the proposed campaign, relative to other non-profit, non-work, and non-family related interests, must be very high. The donors must have a staunch commitment that puts the campaign at or near the top of their priority listing.

4. CONFIDENCE THAT OTHERS WILL BE SUPPORTIVE

Donors must believe that others will share their interest and enthusiasm for the proposed campaign, and that they will not be alone in their support. Successful campaigns generally rely on the top 125-150 significant donors to ensure the campaign's success. A top gift should make up 10-20% of the goal with the top 10-15 gifts providing at least 50% of the total goal. The remaining 100 or so contributions make up the remainder of the campaign in most cases.

5. CONFIDENCE IN CAMPAIGN SUCCESS

Donors must believe that the organization's goals are realistic and attainable. They will not work as hard nor give as much to the campaign otherwise.

6. COMMITMENT TO WORK AND PROVIDE LEADERSHIP

There must be willingness of board members and potential donors of significant influence and affluence to serve as leaders and to solicit pledges in the proposed campaign. This is a crucial

stage, as many campaigns can go on for several years, thus diminishing the probability of finding long-term campaign leadership. A shorter and more focused campaign with top leadership making a solid commitment for this period will enable the organization to reach its goals more efficiently and timely.

7. WILLINGNESS TO MAKE SACRIFICIAL, MULTI-YEAR PLEDGES

Many must be willing to make extended pledges to the proposed campaign, in accordance with their true capacity to give. In #6 above, we mentioned the idea of a "shorter campaign." The payment period of pledges can still be the typical 3-5 year period, but it is always best to secure the vast majority of pledges within the first year or so of the campaign to ensure that your leadership team remains focused and effective.

8. HIGH GRADE CAMPAIGN LEADERSHIP

Top-flight individuals, of significant influence and affluence, must make themselves available for campaign leadership. "Leadership By Example" is the standard. It is imperative that leaders set high personal giving standards so as to evoke a broad and generous response from the community at large. Primary responsibility for originating action, creating the necessary confidence, and conducting all facets of the campaign are the joint responsibility of the General Chairperson of the campaign and Campaign Counsel. With the advice of Campaign Counsel, the Chairperson enlists other leaders, assists in negotiating pledges from key prospects, and guides the course of the campaign. Vigorous, knowledgeable, and influential leaders who enjoy the widespread respect of the community should surround the General Chairperson.

9. POTENTIAL SOURCES FOR LARGE INVESTMENTS IN THE ORGANIZATION'S FUTURE VISION

All those with significant capacity to give should be interviewed as part of the Campaign Planning Study and, while not directly solicited by the individual leading a confidential Campaign Planning Study, be asked the likely level of their support. It must be made clear at this stage that these large investments are above and beyond the individual's current level of annual giving.

10. AN UNQUALIFIED COMMITMENT BY THOSE CLOSEST TO THE ORGANIZATION

Strong support, relative to capacity, must be forthcoming from the organization's boards of directors, related committees, and staff. All must be willing to make campaign pledges reflecting their true capacity to give and be enthusiastically willing to ask others to do likewise.

11. PROPER CAMPAIGN TIMING

The campaign must be timed so as to elicit the broadest and most enthusiastically generous response from the community. The campaign should not interfere with the regular operations of the organization, thus it should be timed appropriate and have the necessary human and technical resources to ensure its success.

12. CONFIDENCE IN THE ECONOMY

The prognosis for the local economy by potential donors should be strong, so that there is willingness to make long-term pledge commitments.

Every campaign is unique, so each of the components above should be weighted and balanced according to the needs of the organization. Will all 12 pieces of the pie ever be in alignment or completely perfect? Not necessarily, as each campaign requires a specially designed strategic plan, which should be the result of a well-executed Campaign Planning Study and a thorough analysis of the 12 components listed above. The planning study will help the organization understand how to capitalize on its strengths, recognize its weaknesses, evaluate the unique opportunities ahead, and minimize the threats to the organization's campaign.

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**FOR MORE INFORMATION ON HOW WE CAN HELP YOU WITH YOUR CAPITAL CAMPAIGN,
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