

The Campaign: A Significant Step Toward Your Institution's Highest Destiny

Campaign envy – we've all seen it, heard it, witnessed it, and, if we are honest, probably exhibited it ourselves. It normally plays out during networking receptions, when a small group of colleagues and new friends huddle together in a corner and inevitably begin discussing the "goal" of their recently completed or current campaign. Non-verbal ques begin immediately to quietly divulge the identity of the person whose institution will be crowned champion (because his/her goal is the largest): eyes opened wide, they stand up straighter, lean in a little, begin to nod their head, just waiting for the appropriate time to speak. This ritual shouldn't surprise anyone; after all, campaigns have been heralded as the hallmark of sophisticated advancement programs for decades. In fact, a recent survey by the Nonprofit Research Collaborative revealed that of 1,071 nonprofit respondents, 46% were currently involved in some type of formal fundraising campaign.

Findings like this underscore the adage that institutions are usually in one of three stages – "planning for a campaign, in a campaign, or closing a campaign." And, there is good reason for this. Run effectively, campaigns advance institutions in significant ways. Not only do they help raise enormous amounts of money (the outcome that clearly receives the most recognition and attention), but they also help institutions strengthen a "culture of giving," elevate the institutional brand, enhance meaningful volunteer involvement, and establish a platform for future institutional success.

Certainly, raising large sums of money to fuel your important mission and vision is an important and urgent campaign outcome. But beyond this, we know that the amount of money you raise during any one campaign actually may be your *second-best* outcome. The first and most foundational outcome may be how your advancement program matures and grows in its capacity to continually help your institution move closer to its "highest destiny."

This issue of the [Bulletin on Advancement](#) will detail the key ways in which your campaign, when well-planned and implemented, helps you raise money today and serves to strengthen tomorrow's advancement program results.

Aligning Your Campaign Fundraising Priorities with Mission and Vision

Of supreme importance to your institution and donors is the work you do and the difference you make in the world. Without mission clarity, not only will your institution struggle to serve society meaningfully, but major donors will not partner with you. In the *2016 U.S. Trust Study on High Net Worth Philanthropy*, 72% of respondents said they support nonprofit organizations because they are moved by how their gift can make a difference. This, of course, isn't a new revelation.

But campaigns offer a unique opportunity for institutions to intentionally reflect on their "reason for being" and articulate, in clear and easily understood terms, how their campaign funding priorities are aligned with their mission, vision and strategic plan. If institutions fail to communicate this connection clearly, donors are left to wonder if the campaign truly is a strategic initiative or something that has been planned less diligently. Furthermore, donors will be, at best, cautiously optimistic that a "successful" campaign will truly advance the work of the institution in a meaningful way. Simply put, donors at all levels give because they believe that your institution's campaign priorities will make a significant impact in a way that makes sense to them. It is important to remember that in this respect, donors do not give *to* institutions, they give *through* institutions.

Within the institution itself, though, leadership must ensure that all campaign priorities are aligned with mission and vision in discernible and important ways. While institutions might find it easy to identify the funding needs themselves, it also is critical that institutional leadership address and answer the question,

"Why is this campaign priority/initiative a most important need for us?"

When that question gets answered thoughtfully, institutional leaders will find enhanced clarity in the mission and vision for the future. Ultimately, institutions that undertake a process of making sure each campaign priority is unmistakably aligned with their mission and vision help build a culture committed to connecting all work with the fundamental purpose of the institution.

Building and Enhancing Your Team

Campaigns obviously require extended and consistent periods of careful planning, organization and execution. The importance of day-to-day advancement functions such as; prospect identification and research, major donor portfolio management, database administration, volunteer engagement, and donor relations and stewardship, become even more critical during a campaign.

Any area where an institution lacks a particular skill set essential to the success of its advancement goals will become highlighted during a campaign. Because of this, campaigns provide an ideal opportunity for institutions to consider how they are building and shaping their advancement teams for long-term success and sustainability.

For example, gift officers may be great relationship builders but lack the understanding and skills to effectively move donors and prospects through the gift cycle. These gift officers may end up visiting many prospects or donors but with gift income results that are less than desirable. Leaders with forethought will seize a campaign to address such gaps by providing professional development opportunities for existing team members.

Or, perhaps there are whole functional areas within the advancement program that are lacking. For instance, the campaign may include a planned giving component, but there is no team member with the bandwidth or skills to invite donors to make planned gifts. Advancement leaders may utilize the campaign to help pay for the additional personnel to address such programmatic short-falls.

Inspiring Your Board's Advancement Involvement

"No institution will be better than its board," is an age-old saw which applies broadly to a Board's governing responsibilities. However, nowhere do Boards struggle more to understand, embrace, and fulfill their governance responsibilities than in the areas of advancement and campaigns. Understanding this, many institutions will utilize campaigns to serve as an impetus for helping their Boards reimagine their advancement role, perfect its implementation, and accent their sense of ownership in campaign outcomes.

Using the planning and implementation of a campaign to inspire stronger Board engagement with the advancement program is useful for two basic reasons. First, the urgency and ambitiousness of most campaign efforts and goals often compel Boards to devote more time and effort to better understand their responsibilities. These deliberations become more focused on advancement and campaign-related issues and can be introduced in retreat-like settings where Board members may be encouraged to focus on the "specialness" of the topic.

Second, a campaign provides Board members with tangible ways to become involved, to serve, and to give. From the Board's work in strategic planning, to the establishment of campaign funding priorities, to reviewing prospective donor lists and offering insights into donor strategies, a campaign allows each Board member to experience the importance of their work and actually participate in specific tasks. Of course, Board members also are encouraged to be public advocates for the institution during a campaign. Perhaps they are hosting events, speaking at events, introducing new prospective donors to the institution, or going on campaign visits with advancement leaders to invite significant gifts from others. And, hopefully, Board members are being encouraged to view themselves as philanthropic leaders during the campaign and are being invited to make their very best personal gift commitments.

Enhancing a Volunteer Engagement Infrastructure

Campaigns also afford opportunities to enhance an institution's engagement of key volunteers. Beyond the governing Board's membership, institutional advisory councils and constituent-based leadership groups, etc., are all helpful groups to engage during campaigns. In fact, the thoughtful engagement of volunteers is one of the most underutilized resources that an institution possesses.

For many advancement leaders, engaging volunteers can feel like another task in a long list that simply doesn't rise to the highest priority. Even during campaigns, it is not uncommon for advancement and institutional leaders to struggle to fully realize the exceptional value the volunteers of influence and affluence can provide. Money does, indeed, follow time. And giving does increase with volunteer engagement.

Here, then, are the three key ways in which engaging volunteers of influence and affluence can dramatically help your campaign efforts:

1. Campaign volunteer leaders typically give the largest gifts during any campaign effort;
2. Campaign volunteer leaders will have relationships with others that will assist your institution in receiving additional support; and
3. Because you will invite campaign volunteer leaders of influence, they will help generate a sense of success around your campaign even before you move into a public phase.

In order to ensure that volunteers are engaged meaningfully during any campaign effort, institutions must take a comprehensive and intentional approach to serving them. For instance, below are ways in which institutions can affirm the important role of volunteers during a campaign:

- ◆ Leadership elevates volunteer engagement as a priority and allocates time to engage with volunteer groups;
- ◆ A staff member is hired to lead volunteer engagement efforts (or an existing staff member has his/her responsibilities shifted to allow time for this critical function);

- ◆ Budget dollars are designated toward the engagement of volunteers;
- ◆ Volunteer policy and procedure statements are written and adopted;
- ◆ Written volunteer position descriptions are shared with all volunteers during their recruitment;
- ◆ Education and training programs are developed to appropriately and thoroughly onboard new volunteers;
- ◆ Software is secured and deployed to serve as a platform to enhance communication with volunteers, make assignments, track progress and communicate outcomes.

Developing and deploying this type of volunteer engagement infrastructure during a campaign (and working to ensure it is not dismantled upon the campaign's conclusion) will position the institution favorably for sustained advancement success.

Strengthening Good Habits with Major Gifts

It's not uncommon for campaigns to start off with great early momentum. Gift income skyrockets and major gifts are received regularly. As we celebrate the quick start of any campaign effort, we know that there will be ebbs and flows throughout the course of the campaign. Some periods will seem as though major gifts are coming in easily while other periods will cause even the most effective advancement professional to wonder if another major gift will ever be received. Additionally, we know that the final dollars to reach any campaign goal can be the most difficult gifts to generate.

While ups and downs will happen during any campaign, advancement leaders also can implement strategies to ensure that the longer-term, major giving future for the institution has far more ups than downs. Perhaps the most important of these strategies is the implementation of an effective and consistent prospect management system. Utilizing a campaign to develop and strengthen good habits with a prospect management system will help ensure that major gifts occur not only when a campaign is in progress but also long after its successful conclusion.



The best and more effective prospect management systems systematically track the progress of prospects through the gift cycle – from Discovery, to Cultivation, to Gift Invitation, to Stewardship. The benefits of such a system are plentiful:

- ◆ Gift officers are reminded and guided in doing the best possible work with donors and prospects, regardless of campaign status;
- ◆ Communication and strategy development relative to the institution's most promising donors improves and becomes more collaborative;
- ◆ Gift officers are focused on purposefully engaging prospects and donors to encourage their next best gift;
- ◆ Newly discovered prospects through research efforts can be reviewed and assigned for Discovery;
- ◆ The existence of a tracking system allows the institution to easily quantify the number of prospects in different stages of the gift cycle and for varying fundraising priorities, which allows for improved institutional decision-making.

Additionally, a prospect management system can identify future potential major gift donors and help to create engagement opportunities to encourage their increased giving. For instance, inviting an institution's most capable annual fund donors to join a leadership-level annual giving society is a systematic effort that a prospect management system can help implement.

It is important to note that the most effective prospect management systems employ two types of meetings to ensure their sustainability. First, individual strategy sessions should happen on a regular basis between gift officers and a supervisor. During these donor strategy sessions, the gift officer should be prepared to share the next steps being planned for their prospects. And while a gift officer may have well over 100 prospects in her portfolio, it is most helpful for each strategy meeting to address no more than 10 prospects – typically, the 10 with whom the gift officer plans to visit or communicate with next.

The second meeting that makes a prospect management system effective is the Prospect Management Team (PMT) meeting. PMT happens either monthly or every-other month and includes all gift officers assigned a portfolio of prospects and donors. In larger shops there may be multiple PMT meetings occurring because of the number of gift officers. The PMT meeting, though, is a communication meeting. It is designed for each gift officer to share their planned next steps with their top 3-5 donors in order to assure that all understand what is being proposed for the institution's best donors and prospects. For most institutions, the best donors give to multiple areas and, as such, having a PMT meeting in which all plans with major donors are communicated is critical.

Absent a prospect management system that is consistently implemented, an institution is working less strategically with its most important donors. A prospect management system, when implemented well will help an institution make important planning decisions, and will focus the work of all advancement professionals, especially gift officers.

Conclusion

This [Bulletin on Advancement](#) asserts that the significant gift income you hope to generate during your campaign actually is the second most important outcome of your efforts. The first and most helpful outcome of any campaign, we are suggesting, is only viewed through a longer-lens of leadership. Campaigns, it seems, are most beneficial because of how they can enhance your advancement program's capacity to serve your institution's mission far beyond the closing of the campaign.

Your institution serves a vital need – a need that helps our world in qualitatively-important ways and will always be part of the human experience. With all the energy, effort, and resources put toward campaigns, you will be wise to ensure that yours actually achieves more than just the dollar goal.