

Campaign Preparation: Getting Your Board, Staff, and Plan Ready



Advance planning can maximize your campaign success.

Is a campaign in your future?

Thoughtful planning has never been more important.

You may have pressure to meet high expectations and establish ambitious yet realistic goals, even if resources are constrained.

That's why taking several key preparation steps can help set you up for the best possible results.

Answer these questions before starting a campaign:

► Strategic plan:

- Do you have a strategic plan in place that is supported by leadership and establishes a clear vision?
- Have your philanthropic priorities been identified?

► Case for support:

- Can you articulate your vision and plans in a way that inspires donors and clarifies campaign components and funding levels?
- Can you describe the change that will result from funds raised?

► Board and stakeholder interest:

- Are your board members and key stakeholders committed to and in agreement about campaign components?

Vision, Making the Case, and Having Stakeholder Support are Vital

A CEO's/President's ability to articulate a powerful vision and connect it to donor motivations has a profound effect on million-dollar gift success, according to research from the Indiana University Lilly Family School of Philanthropy and Johnson, Grossnickle and Associates.*

*Million Dollar Ready: Assessing the Institutional Factors that Lead to Transformational Gifts (2013)



➤ **Board commitment:**

- Are your board members ready to support a campaign?
- Do they understand their role?

➤ **Internal readiness:**

- Have you assessed if your advancement team, leadership, and internal processes are prepared for the rigors of a campaign?
- Have you identified areas in need of additional investment to undertake a campaign?

Key steps to help you prepare for a campaign:

➤ **Strategic planning**

Align leadership, board, staff, and others in support of a unified vision.

➤ **Board preparation and education**

Educate board members on their role in a campaign and the need for their support.

➤ **Development audit**

Analyze data, systems, structures, and staffing to identify opportunities and issues that may impact fundraising success.

➤ **Case statement**

Share your mission, aspirations, and solid planning with top donors to advance their understanding and support of your vision.

➤ **Feasibility study**

Involve prospective donors from the beginning of a campaign and assess your ability to achieve your goal.

DISCOVER FOR YOURSELF.

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