

# Campaign Prep: Set the Stage for Success

**What you can do now to begin preparing for a campaign** | Today's challenging economic environment makes thoughtful planning for a campaign even more important than it has ever been. The pressure to meet increasingly high expectations is real and establishing ambitious but realistic goals is the most effective path to successful fundraising. Avoid the pitfalls of a failed campaign by taking the time to make sure you are well prepared.

Use the following questions to help gauge if your institution is prepared to embark upon a campaign.

1. What do you need to know to launch a campaign – both about the external environment as well as any internal issues?
2. Do you have a strategic plan and have philanthropic priorities been identified?
3. Can you articulate your vision and plans in a donor centered case statement for support that outlines key components needing support and their funding levels?
4. Is there consensus and commitment among the board and key institutional constituents for these campaign elements?
5. Is the board ready to support a campaign and does it understand its role?
6. Have you assessed your internal readiness for the rigors of a campaign?

Consider the following tools that can help answer these questions and set your campaign on the path to success.

## Strategic Planning and Board Preparation

- **Strategic planning** ensures that your organization has a long-term vision and knows the steps to take to achieve it. Effective strategic planning assures that any future campaign supports the objectives your leadership and board have set for the future of the institution and that everyone is working toward the same vision.
- **Board preparation** involves walking your board through the realities of a campaign and clarifying not only the board's role in the success of the campaign but also their commitment to the institution and the identified priorities of the campaign.

## Development Audit

- **A Development audit** is focused on the future and designed to present an objective overview of current strengths and to suggest ways to position the development operation for further success in fundraising. Development audits have both qualitative and quantitative components, including confidential, high-level, structured interviews and quantitative analysis of previous fundraising data and external benchmarking against peer institutions. An audit can identify critical issues likely to help or hinder your fundraising efforts, offers an action plan for strengthening your advancement or development program, and provides a solid base for success in your campaign.

## Case Statement Development and Feasibility Study

- It is important for your organization to be able to state its case for support in an emotionally compelling and factually accurate manner that demonstrates the campaign and the organization to be a sound philanthropic investment. **Case statement development** provides an opportunity to develop and test major campaign themes in a concise, easy-to-read document. The preliminary case for support is the means by which the institution's aspirations will be tested during a feasibility study.
- A **feasibility study** is a key step in preparation for a campaign. A feasibility study tests your campaign goals with top prospects as well as organizational and community leadership and provides a recommended campaign goal, campaign structure, timetable, and action plan for moving forward with a campaign.