

Getting the Board on Board: Campaign Prep

Preparing Your Board for a Campaign | The impact of a campaign on an institution's board is significant. It's a marathon, requiring a multi-year commitment of both focus and strength. It will be all encompassing and requires full commitment from every member. But, just like any good marathon runner, there are exercises you can do now to have your board do very well in this effort.

We believe there are three key elements to make sure you've accomplished –

Step 1: Do you have a PLAN in place?

- ▶ Do board members have a clear picture of the mission, priorities, and funding needs of the institution?
- ▶ Has your board and leadership developed strategic priorities for the next three to four years?
- ▶ What are the critical things for your institution to get done?
- ▶ Can and do board members articulate this focus to others, particularly potential donors?
- ▶ Can board and staff clearly articulate what will be different as a result of the campaign?

Step 2: Do you have the right PEOPLE?

- ▶ Do you have a solid leadership team and are they committed to be there throughout the campaign? Will the president/CEO and Chief Development Officer be there?
- ▶ Are board members committed to the institution's mission and have a strong links to the institution?
- ▶ Do board members have a clear understanding of their role and expectations as fundraisers for the organization?
- ▶ Are board members ready to demonstrate their commitment to fundraising on behalf of the organization by making their own gift?
- ▶ Have at least some board members been actively cultivating top donor prospects?
- ▶ Do you regularly share progress reports on fundraising with the board and discuss specific goals and objectives of the development program?

Step 3: Are you all agreed on the PRIORITIES?

- ▶ Have the board and staff tested the proposed campaign plan with prospective donors? Do they think it is as important as you do? Has this been objectively tested?
- ▶ Does your board know what their role will be in an upcoming campaign and know what they should be doing to support the campaign?
- ▶ Has the board openly and authentically had discussions (more than one!) to review the campaign priorities and preparation?
- ▶ Has staff presented a well thought out plan and timeline for undertaking the campaign?
- ▶ Have you examined the resources needed to successfully implement a campaign and gotten the board's support?
- ▶ Does the board have an understanding of the institution's actual gift capacity?

By taking the time to prepare your board for a campaign, you can improve your odds for success. You should also talk to others in the industry with experience successfully conducting campaigns of similar scope. There is no need to reinvent the wheel. In addition to talking to your own professional colleagues, JGA's seasoned consultants are always happy to have informal conversations to gauge your progress as you prepare for a campaign and provide feedback on your planning.