

Before the Launch?

Ignore Essential Campaign Planning Steps at Your Own Risk!

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Getting ready for a fundraising campaign has never required more time, effort, and attention. Donors are asking tougher questions, financing is harder to come by, and government funding is in short supply. In this environment, nonprofit leaders would be wise to familiarize themselves with the “campaign lifecycle” and consider what they can do well in advance of the launch of a significant fundraising campaign to ensure its success.

Consider the campaign feasibility study. While it continues to be the best method for an organization to assess the viability of significant initiative, its benefit can be magnified exponentially if staff and volunteer leaders spend time sharing and seeking input on their campaign vision months before the first study interview takes place.

This type of “campaign readiness” includes three crucial steps:

1. Developing an initial case for support to test the idea with prospective donors.
2. Training staff and volunteers for in-person meetings with current and prospective supporters to share the case.
3. Inviting feedback from those supporters to further shape the case and develop a winning campaign approach.

This process will help your organization’s leaders develop the confidence they need to personally engage with many more supporters during a campaign and will ensure that the campaign vision truly reflects the community’s values. For many organizations, this process leads to a feasibility study. For the lucky few, they’ll be able to ramp-up immediately into campaign mode.

Intermountain, a 100-year-old human service organization in Montana, saw three direct results of engaging in a “campaign readiness” process:

- Some of the donors they met with during the readiness phase significantly scaled up their giving later when they were invited to support the campaign.
- Board members and other volunteers have embraced fundraising like never before, and staff and volunteers are partnering much more effectively to engage potential supporters.
- The campaign case is comprehensive, wrapping together core program support with special initiatives, so that potential supporters at all levels can fully grasp the big steps the agency is taking to serve many more vulnerable children and families.

Another important pre-campaign step is solidifying and strengthening your current development program and activities. Campaigns can transform a nonprofit’s fundraising operation, and leaders who invest in staffing and systems early and often will see long-term benefits.



Conducting a development audit or a development advancement study will help identify current challenges and shortcomings as well as opportunities for growth. Prior to launching a campaign, Pacific Science Center hired great talent to expand its development team and invested in a development advancement study. As a result, the Science Center's major and planned gifts program is emerging strongly, print and electronic communications are more donor-centric, and systems for nurturing the donor "pipeline" are coming into place.

Here are a few other issues to address early in the campaign lifecycle:

- **Cash flow projections:** Make sure your development and finance teams are working collaboratively to sync up revenues and expenses, especially if you are allowing donors to pledge and pay gifts over time.
- **Project planning:** Most nonprofit executives are experts in their particular fields but naïve when it comes to overseeing a construction project, so consider hiring a project manager (or owner's representative) to manage the relationship with architects and contractors and navigate the permitting process.
- **Seed funding:** Early planning usually costs money, so it is helpful to secure special gifts from board members and other insiders to fund the essential building blocks of campaign success.

As the saying goes, failing to plan is planning to fail. Taking deliberate steps to get your house in order and prepare your staff and volunteers for some heavy lifting will create an environment in which you can successfully engage your closest and strongest supporters. Asking them to join you on the journey will help to cement meaningful, lifelong, donor-centered relationships. There's no time like the present because, in a decade or so, the cycle will begin again.