



# The Path to a Successful Campaign

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# The Path to a Successful Campaign

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Drawing on decades of collective experience planning and implementing capital, endowment and comprehensive campaigns, The Schultz & Williams Development team identify four elements essential to campaign success. They address the benefits, best practices and trends surrounding the phases of the campaign planning process in light of a growing tendency to truncate the optimal path to campaign implementation.

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## Introduction

With a strong economy and an overall sense of enthusiasm across the country for tackling the difficult problems our society faces, today's philanthropic landscape presents an ideal environment for launching a new capital, endowment or comprehensive campaign. In the aftermath of the 2008 downturn, donors recognized that organizations with an endowment and a good financial plan emerged stronger than ever, further strengthening the case for strategically-driven fundraising. In addition, innovations in technology enable everyone—from the smallest nonprofit to the largest organization—to be more efficient and effective in the work that drives successful campaigns.

Our experience planning and implementing campaigns from \$500,000 to \$500 million for organizations of all types affords us a unique perspective on what works and what doesn't in campaign fundraising. In this paper, we'll take a closer look at the four elements we have identified as essential to a successful campaign, the crucial role of the overall planning process and some of top trends we've recently encountered.

With the appropriate preparation, we believe today's nonprofits have a real opportunity to achieve meaningful success in their next campaign—and to take their organizations to the next level.

## Four Keys to a Successful Campaign

In our experience at Schultz & Williams, all successful fundraising campaigns incorporate four essential elements: a clear and compelling case for support, a cultivated constituency willing to contribute, effective campaign leadership, and the staffing and infrastructure necessary to support a campaign.

### **Clear, compelling case for support**

A clear and compelling case for support frames the campaign's priorities in a way that ignites donor enthusiasm and creates a sense of urgency, answering the questions in the back of every donor's mind: Why this? Why now? Why me? An effective case is forward-looking, vividly describing your vision for the future and the campaign's impact on the mission. It relegates the dry though necessary minutia of the plan (like where the parking lot will be relocated) to the backdrop in order to let the exceptional outcomes the campaign will facilitate shine front-and-center.

In the field, we've observed two significant trends important to keep in mind when crafting a case for support: 1) a growing demand for brevity that challenges us to distill the essence of the argument for donor support and 2) the rise of an investor mindset among donors, which makes demonstrating impact imperative.

Today's campaign materials are far simpler than in years past, giving greater attention to topline messaging that creates an emotional

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connection with the donor. At the same time, donors want to see the campaign's expected ROI in terms of specific outcomes—such as the number and kind of students an endowment will fund—as well as a clearly defined business plan.

## **A cultivated constituency willing to contribute**

You can't raise money for a campaign if there's no one to ask—or if your people aren't interested in giving to the effort you're asking them to support. A cultivated constituency that's willing to contribute to your campaign endeavor is essential.

Having an existing major gifts program already in place provides a critical foundation upon which to build your campaign; a general annual giving program will not be enough. While there are many strategies and tactics even small organizations can use to build the cultivated constituency a campaign requires (go to our website [www.schultzwilliams.com](http://www.schultzwilliams.com) to see our paper *Simple Steps to Starting a Major Gifts Program*), these initiatives take time. Early identification of a gap in this arena is crucial.

Even organizations with a well-oiled major gifts program will need to closely examine their existing constituency, deepen their understanding of their donors' thoughts and priorities, and explore their circle's connections to potential new donors. It's tempting to assume you already know everything you need to know about your base, but campaign success hinges on *how well* you know your constituency and their thinking surrounding your campaign plans.

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## **Effective leadership for a campaign**

Leadership that's informed, inspired and ready to command a campaign is the number one indicator that the effort will succeed. It's critical to take time at the very outset for administrators, the Board and top donors to align their vision for the organization's future and build enthusiasm around the campaign endeavor.

Organizations contemplating a campaign should begin building up their Board two to three years in advance. Your ideal Board will be a "fundraising" Board; a Board that's heavy on professional expertise but light on philanthropic power will struggle in a campaign. In many cases, some form of a "Campaign 101" initiative will help Board members understand what's involved and what's expected of them.

It's also essential to have an organizational head (executive director, president, head of school, etc.) who's accustomed to fundraising and in sync with a capable head of development. Dynamic co-chairs—individuals who will set an example by making stretch gifts while working to secure additional gifts—should be thoughtfully identified once the organization is well into the planning process to avoid hasty mistakes. It's important to note that these co-chairs won't necessarily include the lead donor, who can always be given an honorary title instead of this crucial working role.

## **Staffing and infrastructure to support a campaign**

Without careful attention, a campaign can put real stressors on an organization's staffing and infrastructure. Your staff needs to have the

capacity to do the work involved before, during and after a campaign. In addition to having *enough* staff, the entire team of a successful fundraising organization will demonstrate a culture of philanthropy—a pervasive awareness that the organization’s every activity and every touch point with every constituent is connected directly or indirectly to fundraising.

Prior to launching a campaign, an organization’s database needs to be clean and ready to track pledges and multiple payments. Even the biggest and best organization’s database can often use a good scrubbing to prepare it to serve as the clearinghouse for all the reports and information needed during a campaign. A messy database and poor database management practices can lead to costly errors—such as inaccurate gift and pledge records that interfere with proper stewardship—drastically impacting an organization’s relationship with its donors both throughout the campaign and into the future.

When considering staffing and infrastructure, it’s important to remember that a campaign will require its own budget allocation—typically between 5% and 10% of the overall goal—for expenses such as travel to facilitate one-on-one asks, studies, marketing materials, postage, counsel and interim staffing.

## A Roadmap to Campaign Success

Planning for a campaign is a learning opportunity for every organization— even organizations with significant campaign experience.

Every campaign is different: goals change; priorities change; leadership changes; the philanthropic landscape changes. Properly preparing for your campaign’s launch and thoroughly assessing your strength in the four key areas described above is the most effective way to ensure success.

At Schultz & Williams, we typically recommend the following roadmap for optimizing your campaign’s outcomes and efficiency.



### **Pre-campaign Planning**

When contemplating a potential campaign, it’s important for an organization to take a hard look at its overall strengths and weaknesses, as well as the strengths and weaknesses of its development operation. With sufficient lead time, you can make the adjustments necessary to better position the organization for a successful campaign. In this stage, we lay the foundation for the campaign planning study, which includes a deep dive into your database to better understand your prospect pool and begin refining the campaign prospect list, as well as structured engagement of your Board. While this step is the one most often skipped, the groundwork laid in pre-campaign planning makes the work in subsequent steps quicker and more effective.

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## **Campaign Planning Study**

The next leg of the journey is often called a “feasibility study.” But at S&W, we prefer the term “campaign planning study.” After all, the study doesn’t just answer the question of whether or not the campaign is feasible but *how and when* a campaign might proceed successfully. In this stage, we test the four elements critical to success, externally validate the organization’s campaign priorities, determine what needs to be addressed before the campaign can move forward and consider how to optimally structure the campaign. This work includes seeking stakeholder input on a draft version of your case, interviewing key members of your base, evaluating your Board and leadership’s buy-in and readiness, and assessing the status of your staffing and infrastructure.

## **Campaign Planning**

Armed with the information and the unified vision that emerge from the campaign planning study, we proceed to outline the overall strategy and the tactical steps of the campaign in a comprehensive and detailed plan of action. This entails activities such as establishing a detailed timeline and budget; identifying campaign co-chairs and other roles; setting goals, policies and procedures; laying out cultivation plans; and otherwise organizing all the elements necessary for a successful campaign.

## **Campaign Implementation**

Once the plan is in place, campaign implementation typically begins with a quiet phase, in which lead gifts are secured from key donors. This is

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followed by a major gifts phase and the final public phase inviting the larger community to contribute to the campaign's goal. With campaign activity in full swing, the campaign director plays a vital role in moving the plan forward and keeping everyone on course. Outside counsel engaged earlier in the process can also continue to play an important role in facilitating the campaign's implementation. With proper attention to the first three legs of the journey, campaign implementation typically rolls forward smoothly.

## The Top 7 Reasons You Shouldn't Skip Steps on the Campaign Path

Although it's not new to see organizations skipping steps in the recommended planning progression—especially with smaller organizations where strategic trade-offs must often be made—we've encountered a growing tendency to skip one or more of the steps on the path to a campaign, and at great cost. While it's true that many trends present innovations worth adopting, skipping on the planning phases isn't one of them.

The following are our top seven reasons you should invest in properly planning your next campaign:

- 1. Ensure you have all four elements that spell campaign success.**

The planning process is structured to help organizations get the four elements of campaign success into place in an efficient and effective manner. Areas that need focus come to light when they're

easy to address. The case for support crystalizes more quickly. Leaders and dollar goals emerge naturally.

Running a campaign is stressful enough as it is. Rushing ahead without proper planning just makes the process harder and increases the likelihood you'll end up with Band-Aid workarounds as preventable problems arise. But when you use the planning process to ensure you have the four elements of a successful campaign in line *before* you begin implementing your campaign, everything else falls into place.

## 2. **Cultivate your campaign prospects.**

Any time you can engage your key prospects in the planning work that underlies a campaign, it's a total homerun. Getting your donors' input generates buy-in and builds a sense of shared ownership. Interviews for the campaign planning study offer a touch point in a confidential setting and generate candid feedback useful far beyond the campaign. Establishing committees surrounding planning activities gives you the opportunity to involve top donors and potential leaders.

In recent years, we've observed a growing interest in soliciting broader constituent input through online surveys and focus groups. This additional step allows organizations to reach beyond their circle of top donors for a deeper understanding of their base and wider cultivation of potential campaign donors.

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### **3. Gain objectivity.**

Some organizations new to the idea of conducting a campaign don't yet fully grasp what a campaign entails or the type of prospect pool they'll need to have. Others haven't done a campaign for a number of years and wonder whether their organization is regarded as one with the heft and capacity to undertake a new major campaign. Throughout the planning stages, organizations gain crucial objective information and a heightened level of self-awareness.

Although organizations may believe they already have great case for support, their plans are often conceived in isolation. The campaign planning study offers an objective assessment of the organization, its plans and its constituents' perceptions and perspectives—often uncovering things the organization can't see because its leaders are so invested. Having an outside person speak confidentially with donors to get their input frequently elicits thoughts donors might not feel comfortable sharing directly with the administration. Such revelations can save an organization significant time and energy.

### **4. Engender confidence in your ability to succeed.**

Sophisticated donors will want to know you've done your due diligence in conducting the requisite planning steps before committing to your campaign. In addition, proper preparation

ensures you'll have the right answers at the ready when donors have questions.

For example, many donors will ask whether you have 100% Board commitment to the campaign. You can make sure you do by uncovering this information—and making the necessary adjustments—well before any donor asks. Appropriate planning will also leave you better prepared to field questions about the financing and cash flow for any bricks-and-mortar projects.

## **5. Harness the power of analytics.**

Philanthropic capacity screening (also known as wealth screening) and prospect modeling offer an efficient way to begin prioritizing and qualifying donors for a campaign during pre-campaign planning. A clearer picture of your donors' capacity helps set campaign goals and gives solicitors the confidence to ask for gifts higher than they ordinarily would have asked for. In addition, the data can uncover important candidates to interview for the campaign planning study as you test how well your case resonates with top prospects.

Increasingly, even smaller organizations are discovering the benefit of investing in analytics, which can be especially helpful for shops that don't have prospect research staff.

## 6. Succeed in today's more competitive and complex fundraising environment.

Nonprofit fundraising is more competitive than it used to be 30 years ago, and the high level of analytics—now ubiquitous in the field—not only increases fundraising's efficiency, but also its complexity. Organizations need to use every tool in their ever-growing toolbox to figure out how to become their donors' number one priority.

In our experience, these changes in the philanthropic landscape are due in part to a tendency for today's donors to give to fewer charities. According to the *Giving USA 2017* report, members of Generation X are 74% more likely to give to fewer organizations.

Donors are more focused on clearly defined priorities, and they're paying closer attention to what they're giving to. Their expectations for seeing a return on their "investment" have fueled the evolution of sophisticated stewardship programs.

As various nonprofits compete to attract the same donor, they're doing a better job showing impact and sharing information with their constituents. For your campaign to succeed, you need to be clear about the compelling outcomes you will produce with your donors' support. Testing your case is more important than ever to ensure it can compete with all of the available information that's out there.

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## 7. Inspire unified commitment behind the vision.

For a campaign to succeed, it's crucial that the Board and the organization's top donors are on same page very early on. The planning process unites the entire organization and its constituents behind a long-term vision and provides an opportunity to inspire people to grow their commitment. Building this visionary unity is one of the primary benefits of conducting a campaign in the first place, and skipping the planning steps that nurture and define these shared aspirations limits the heights to which your campaign can take your organization.

## More Than Your Goal Is on the Line

Not only is there much to be gained by travelling the complete planning path in preparation for a campaign, there's much at stake when an organization makes the decision to cut the planning route short. Of course, there's the obvious possibility: failing to raise all the money toward your goal. While this can be embarrassing in and of itself, failing to meet your goal may also mean you'll have to take on debt to fund the balance of the project if your plan involves breaking ground for a bricks-and-mortar endeavor.

Also on the line are your reputation and credibility for years to come. Even in the quiet phase, you are still outside your walls and talking to major donors. If you don't have a legitimate answer to a donor's question

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or if embarrassing gaps or missteps resulting from a lack of due diligence or transparency come to light, the consequences could be crippling.

Finally, poorly planned campaigns often become poorly run and severely understaffed campaigns—resulting in staff burnout or turnover, a damaging setback for donor stewardship. A campaign should help build up your organization’s culture of philanthropy, bolster the annual fund and elevate your overall fundraising operation. But all this can only happen with sufficient—and happy—staff and the infrastructure to do what needs to be done before, during and beyond the campaign.

## Conclusion

A campaign not only provides crucial funds to further an organization’s mission, it offers a unique opportunity to strengthen the organization’s overall impact and inspire renewed commitment. But realizing a campaign’s full potential can’t be achieved overnight. It requires the commitment, enthusiasm and foresight that can only be achieved through a systematic approach to proper planning, begun well before a single ask is ever on the table.

## Works Cited

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## About Schultz & Williams

Schultz & Williams is a strategic development, planning, multi-channel fundraising and marketing consulting firm serving our nation's nonprofits in areas such as healthcare, education, arts and culture, the environment, social justice and wildlife. S&W approaches its work with the conviction that every nonprofit's development, management and marketing strategies must be fully integrated for organizations to realize their greatest mission impact.

S&W's Development leadership team—Senior Vice President and Managing Director, Development Kathleen Watson, Vice Presidents Cathy Card Sterling, Jean Tickell and Matthew Brown, Senior Consultants Kelly Grattan and Patricia Van Allen Voigt—has conducted campaign planning studies, developed campaign plans and/or implemented major campaign fundraising efforts during both private and public phases to help organizations reach campaign goals ranging from \$500,000 to \$500 million. In addition, our deep bench of experts has worked in organizations just like those we serve, providing each client with an informed and effective approach to planning, managing and implementing successful campaigns and programs that support the growth and advancement of their missions.

Established in 1987, S&W has partnered with more than 1,000 outstanding clients coast to coast and has more than 65 seasoned professionals and senior-level consultants covering the firm's full range of services.

Headquartered in Philadelphia, S&W also has operations in Washington, D.C., Los Angeles and San Francisco.