CARTER
Advancing Philanthropy Worldwide

CAMPAIGN READINESS

A major campaign, be it capital, programmatic, endowment, or comprehensive, can be exciting, transformational, and fun (yes…fun!). It can also be daunting. This document is designed to provide an overview of campaign essentials, preparation, and implementation and to serve as a tool in determining organizational readiness.

What is a Campaign?

A campaign is an intense effort to raise significant funding for a specific need in a defined time period. It is used to realize a big vision that addresses an urgent and compelling need that is identified through a strategic planning process. It is designed to:

- Raise the most money
- For the highest priorities
- At the most efficient cost
- While strengthening life-long relationships

Five Campaign Essentials

Successful campaigns share five key elements:

- Strong leadership, both volunteer and professional
- A compelling and emotional case for support
- Adequate internal resources
- A great plan
- Access to philanthropic dollars

Campaign planning also requires the consensus of the board, priority attention from the administration, readiness among development staff, the participation of program staff, and a deep understanding of donor and volunteer readiness.

Vision Infused Fundraising

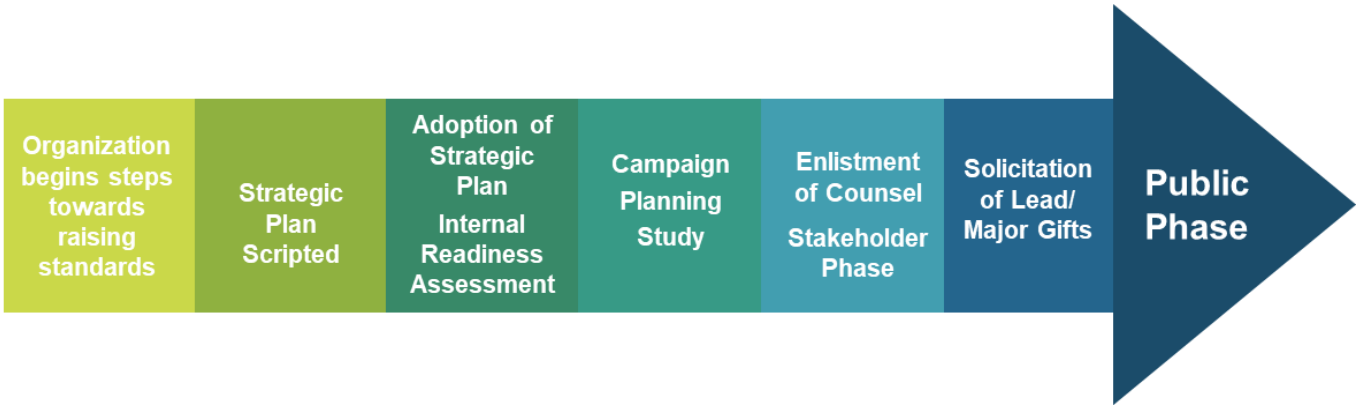
Campaigns work because they force organizations to articulate a vision that:

- Is clear about the need the organization is responding to in the community
- Is inspirational and transformational
- Has simply stated, tangible outcomes
- Has a defined time horizon
- Has clearly articulated investment requirements

To articulate such a vision, the organization needs to answer:

- What is central to our mission…
- That we cannot do now…
- But could do with more philanthropic income…
- Beyond annual fundraising?

Progression to Success



Step by Step

The progression above focuses heavily on organizational and strategic planning. Far too many organizations rush into a campaign without first creating the proper structure to sustain long-term fundraising. This includes shifting to a Culture of Philanthropy mindset. Once an organization does have a strategic plan that clearly demonstrates the need for a campaign, it can embark on its campaign journey. Steps include:

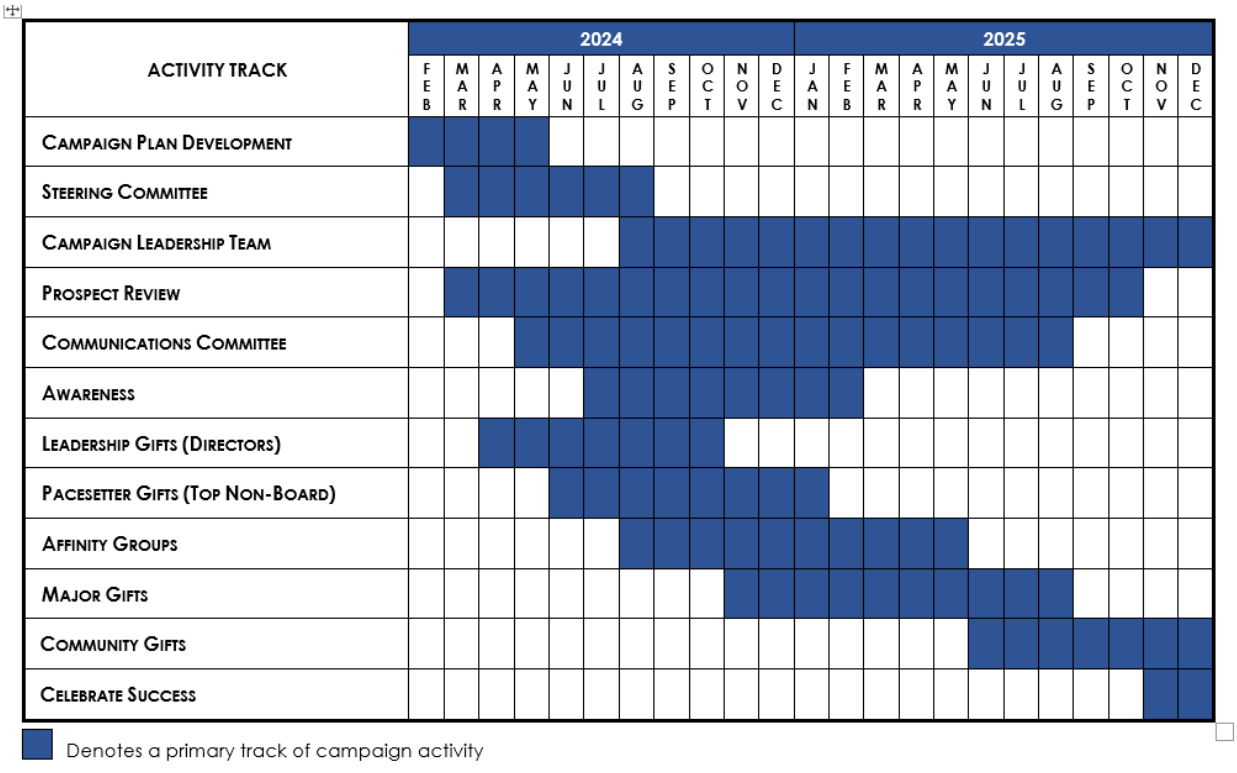
- An assessment of the development program (formally referred to as an audit)
- Planning study (frequently referred to as a feasibility study)
- Pre-campaign planning to address planning study recommendations
- Stakeholder, Leadership, and Major Gifts phases (also known as a Quiet Phase)

- Public phase
- Conclusion and payout

Timeline

Campaigns vary widely in size, scope, and duration. As a general rule, the amount of time it takes to secure the top ten gifts will determine how long the overall campaign will take. In all cases, it is important to set a demanding time schedule. While the timeline may be shortened or lengthened in response to internal and external factors, a disciplined approach will ensure the campaign is both efficient and effective.

Sample Planning Study Timeline:

PHASE I	PHASE II	PHASE III	PHASE IV
Months 1 & 2	***Months 2 & 3***	***Months 3 & 4***	***Month 4***
Orient Leadership		Analyze/Synthesize Data	Presentation of Final Report
Prepare Case	Conduct Personal Interviews	Develop Report, Findings, Recommendations	
Identify Study Sample			
Send Introductory Letters	Potential Web-based Survey	(Initial briefing with leadership)	
Schedule Interviews			

Sample Campaign Timeline: