



The Campaign Principle

Be Specific!

The best way to be successful with any fundraising campaign is to be specific. Put another way, the essential principle of any campaign which achieves or exceeds its goal is that it answers these three questions:

1. Why is the money necessary?
2. How much money is required for the project?
3. When will the campaign be completed?

Let's consider each one individually.

Why is the money necessary?

Donors and volunteers want to know that the organization's appeal for a significant pledge over a multiyear period is going for a project they can support. Successful organizations have found that the more specific the project, purpose or cause is, the more appealing the Case for Support. The organization needs an intellectual, emotional and spiritual focus to give donors a feeling that the project is worthwhile.

A well-researched and carefully written *Case for Support* is fundamental to enlisting the involvement of both donors and volunteers. It must both appeal to the intellect and evoke an emotional response. By demonstrating the project is worthy of investment, your organiza-

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An Essential Element of Success

The Campaign Plan: Putting It All Together

Campaigns rarely unfold precisely as planned. No campaign plan can ever anticipate all the contingencies that are bound to occur during a capital campaign, or how each of these unique situations can best be resolved.

Most capital campaigns aim to generate support at several different levels, from a number of distinct constituencies. Through decades of experience, we've learned that the only practical way to implement such a complex undertaking is through a high degree of centralized coordination.

The campaign plan calls for a great deal to be accomplished in a short period of time. It is the rapid pace of events, and the volunteers' adherence to the plan and timetable, which help to establish and maintain the momentum of a successful campaign. And it is precisely the dynamic nature of a campaign which requires that it be based on a realistic plan and organization, and executed within a specific time frame.

In this way, the campaign will achieve its ends as productively and efficiently as possible. What's more, everyone involved will find the experience a satisfying and rewarding one!

Principles of Campaign Organization

The plan must integrate all the essential elements of a winning campaign into a detailed, step-by-step plan of action, based on a well-conceived strategy and implemented by a campaign organization built for the purpose, according to a definite schedule.

Such a plan must be guided by the time-tested principles and methodologies of successful fundraising. For example:

- **Personal (face-to-face) solicitation** by a carefully selected and well-trained volunteer who has already made a financial commitment of his or her own. As the saying goes, "People give to people." When a person is asked for a contribution,

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The Essential Elements of Winning Campaigns

Looking back over our firm's collective experience, it is obvious that changes in the development field have affected how the philanthropic marketplace functions—and how capital campaigns are conducted. The essential elements of successful campaigns, however, are not very different from those which have applied for decades.

This is the question we explore in "*The Winning Campaign*," our eleventh volume of *The Goettler Series*.

In Volume 11, you will learn about the seven elements we believe are crucial, based on our 50 years of experience in planning and directing winning campaigns for nonprofit organizations:

1. A solid organization
2. A worthwhile project
3. A compelling case for support
4. Availability of sufficient financial resources
5. Qualified and committed volunteer leadership
6. Pacesetting leadership gifts
7. A realistic and well-executed plan of campaign

Because of unprecedented competition for the attention and allegiance of donors and volunteers, it is more important than ever that these essential elements be present. They still separate the winners from the rest of the pack.

Be Specific! *The Campaign Principle*

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tion should easily answer this first question and help supporters understand why the money is necessary.

How much money is required for the project?

Some organizations will attempt to set the campaign goal by adopting the "let's see how much we can raise" approach and embark on a path designed for less than successful results.

A more effective method is to set the goal at the beginning, clearly establishing a measure of success with a specific dollar amount. This approach allows for the creation of a *Table of Giving* standards, which assigns donation categories based upon the total goal. Volunteers will clearly understand how the goal can be reached and specific donors can be identified for targeted contribution amounts. A specific dollar goal will ultimately provide a clear measure of success and everyone involved will know when the job is finished.

When will the campaign be completed?

Another common mistake organizations make in planning capital campaigns is to answer questions about the duration of the campaign by stating "as long as it takes." Put another way, they establish the goal, but do not define the time limits of the campaign period.

A capital campaign is defined as an effort to raise a specific amount of money, for a specific purpose, over a specific period of time.

By establishing a specific *Campaign Timetable*, the organization creates a sense of urgency and is able to build and sustain momentum. Volunteers and donors will be more committed with a clearly defined end date on the horizon. The never-ending campaign grows stale and volunteers as well as donors will lose their enthusiasm as time elapses.

The Campaign Principle

Reduced to its essence, a capital campaign is defined as an effort to raise a specific amount of money, for a specific purpose, over a specific period of time. Each element of this formula is integral to the whole, and begins to lay the foundation of a corps of self-motivated volunteers and donors who will make your campaign a success. The campaign principle helps the prospective volunteer and donor define the task at hand and take action, so your campaign operates through personal influence and persuasion, rather than coercion.



The Campaign Plan: Putting It All Together

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both the answer and the amount often depend to a great extent on who does the asking.

- **Selective and sequential solicitation** beginning with the “institutional family,” including the trustees, and continuing with those known to be capable of the largest gifts. If those closest to the institution (and those who know it best) do not validate the campaign through a concrete expression of their support, then outsiders can hardly be expected to contribute generously.
- **Distribution of work** that assigns all the anticipated tasks to soliciting and service committees with specific donor portfolios.
- **Definite and limited responsibility** – through the use of specific job descriptions for all volunteer positions.

A capital campaign is a collaborative project of significant scope. To complete it successfully and on time, we need to make sure that every volunteer:

- knows what he or she is expected to do;
- understands how to go about doing it; and
- has enough (but not too much!) to do.

The preparation of a practical plan of campaign is one of those tasks best entrusted to professional counsel, who can draw on a broad base of experience with other organizations, communities, and campaigns.

However, the plan should also be based on the specific facts, opinions, and advice gathered through a professionally conducted planning or feasibility study. The reason is simple: if you were to draw a map, you must first do a survey of the terrain. You need to find the high ground, the low ground, and most importantly, the pitfalls. This kind of information not only shows you how to avoid them—it can help you repair them.

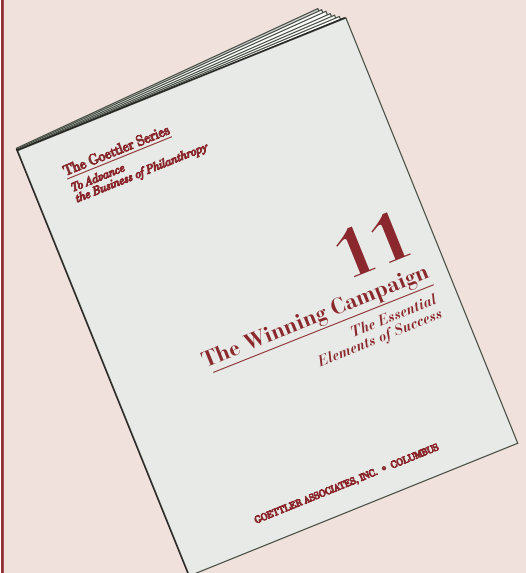
Once defined and, more importantly, executed, your campaign plan becomes a road map to success that is tailored to your specific circumstances. Further, it provides a strong foundation for annual fundraising to follow.



The Goettler Series

The Winning Campaign The Essential Elements of Success

What factors are crucial to fundraising success? In *The Winning Campaign*, Volume 11 in our Goettler Series, we explain how good planning and strategy, as applied to a worthwhile project by capable leaders, produce successful capital campaigns.



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On Second Thought: Is Your Campaign Undercapitalized?



David Goettler
Chief Executive

To take advantage of all the possibilities presented by an intensive capital campaign, the development office must have sufficient human and financial resources to do the job. The presence of counsel cannot compensate for a lack of full-time staff.

A major capital campaign is often a good time to invest in a larger development staff and budget since such an investment is likely to produce dividends more quickly than usual. Undercapitalization of the development effort, on the other hand, may prevent the organization from realizing all of the longer-term benefits that a capital campaign can bring.

In preparing for a major capital campaign, we often recommend an internal assessment of the organization's development function (usually in concert with a campaign planning/feasibility study).

A campaign can present an opportunity to address difficult issues that sooner or later must be faced.

During the assessment, we gather information and opinions on the organization and its development function. We focus on the current resources—staff, budget, and volunteers—available to the development office. On this basis, we try to provide forward-looking recommendations on the most effective use of current personnel, as well as any additional staff and office resources that may be required to ensure the success of a major capital campaign.

These recommendations are not always easy to implement. The organization, for example, may be asked to consider investing a good deal more in the development function than it has in the past. We've found that preparations for a capital campaign — especially with counsel on hand — can present the best possible opportunity to address some of the difficult issues that sooner or later must be faced.

