# Lessons Learned Navigating Capital Campaigns

## Tried-and-True Advice for Accidental Campaign Directors

Kindsight

# There are two types of campaign directors: the “*career* campaign director” and the “*accidental* campaign director.”

If you suddenly find yourself appointed to the role of campaign director with no prior experience, this is the ebook for you.

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# Introduction

There are two types of campaign directors. The first kind is what I would call the "career campaign director," a person who has served as a campaign director multiple times at multiple institutions. This type of person is fairly rare.

More common is what I consider the "accidental campaign director," a term I would use to describe myself. An accidental campaign director is someone who is effective at doing their day job, such as being a development officer or perhaps (like me) leading advancement services. And, because there is no budget at the organization to hire a full-time campaign director, the accidental campaign director is appointed to their role with no previous experience. They may even, like me, be expected to keep doing their original job while serving as the campaign director.

If you suddenly find yourself an accidental campaign director, this ebook is for you. You who are adept at your day job and suddenly trying to learn as much as you can about what campaigns are like. You are sincere and hard-working, and you want to learn as much as you can about what will be expected of you and what pitfalls to avoid.

This ebook was developed not only from my own experience, but from interviews I conducted with campaign directors at various institutions. Not surprisingly, most of us had very similar experiences and lots of advice to impart. I asked everyone in my interviews "what do you wish you knew when you started out as a campaign director?"

The following information summarizes what I heard.

- Erin Lynch Moran, Certified Executive Coach,
*recovering accidental campaign director*

### Types of Campaign Directors:

**Career**

- Has been a campaign director multiple times
- Worked in that role at multiple institutions

**Accidental**

- Existing staff member who has been tapped to do the job
- Has no previous experience planning a campaign

THE PLANNING PHASE:

# Feasibility studies.

# We do not do a good enough job talking about the *purpose* of feasibility studies.

Yes, they are a wonderful way of testing a campaign goal. But this is just one of many reasons why such studies play an important role in the campaign planning process. If you've never participated in a campaign feasibility study, the process goes something like this:

1. An institution begins to articulate its campaign priorities and tentative goals.
2. The institution begins a feasibility study either itself or with the help of outside counsel.
3. The prospects who are most likely to support the campaign at the upper levels of the campaign pyramid are invited to participate in interviews for the study.
4. Prospects are asked to review information (e.g. a white paper) that outlines the major objectives of the campaign and what the institution is hoping to accomplish as a result.
5. Prospects are interviewed about their reaction to the information they received. They are asked whether the objectives resonate with them, whether they have confidence in the institution's leadership and its ability to meet the goal, and whether they themselves would be likely to contribute to the campaign. If possible, the interview will result in a rough estimate of what that particular prospect is likely to contribute.
6. The interview results are analyzed, along with data on the overall giving capacity of the organization's constituency as a whole. Both philanthropic capacity information and past giving information will be carefully considered.
7. On the basis of the above, the institution or its outside counsel will conclude whether the campaign goal that was tested is realistic. They may provide a dollar range representing what the institution could likely raise over the course of a defined number of years.

Without a doubt, the stated purpose of such studies is to identify a realistic campaign goal. However, there are many other reasons that conducting a feasibility study is a good idea. Here are just some of them:

Feasibility studies provide an outstanding opportunity to **cultivate your organization's top prospects** and to make them feel like they are part of the campaign from the beginning.

They provide a rare opportunity to **get candid feedback** from prospects about your organization's leadership and strategic direction.

They help your organization understand **how much interest** your prospects have in supporting specific campaign initiatives.

They inform organizations about the **appropriate timing** of a campaign effort (when to begin, when to go public, and when to close the campaign).

In a worst-case scenario, they help organizations **revise potentially unrealistic expectations** and/or avoid publicizing a goal they cannot attain.

In a best-case scenario, they help **excite top prospects** about the organization's direction and get them thinking about their own campaign commitments.

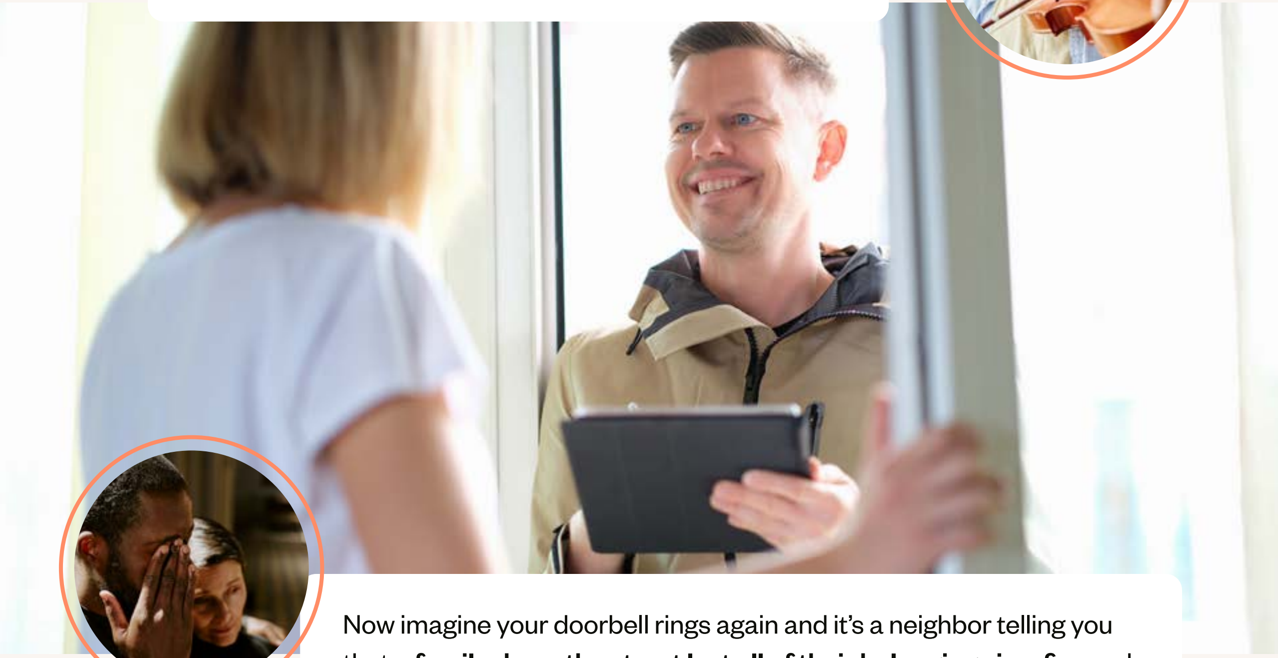
As you can see, the result of a good feasibility study is something that cannot be replicated simply by analyzing donors' capacity to give. Capacity assessments are a good starting point and can inform decisions about who should participate in feasibility study interviews. But what such assessments cannot provide is a sense of the degree to which your prospects are excited about the specific initiatives your organization is raising money for.

## Does understanding that excitement level *really matter* if you have deeply loyal prospects who will support your organization regardless?

**Yes.** In fact, it matters quite a bit in determining how much your campaign can raise.

To understand why excitement level matters, imagine this example:

Say your doorbell rings and you answer it to find **children selling candy to raise money to support their orchestra**. Imagine that you're willing to give them money and ask yourself realistically what you might offer them.



Now imagine your doorbell rings again and it's a neighbor telling you that **a family down the street lost all of their belongings in a fire** and the neighborhood is raising money to help them get back on their feet. Imagine that you're willing to give them money and ask yourself realistically what you might consider offering in this scenario.

Chances are good that the dollar amount you might be willing to provide to support a children's orchestra is different from what you would give to help your neighbors in a time of urgent need.

> Your capacity to give has not changed, but the difference between these two causes inspires different degrees of motivation and a different sense of what would be an appropriate level of sacrifice.

This example explains why feasibility studies are not merely an exercise involving giving capacity. Without getting a sense from your top prospects on how motivated they are to support your campaign priorities, you might end up with a campaign that they find uninspiring.

Mathematically, campaigns must rely on a small number of very large gifts in order to reach a campaign goal. It is not uncommon, for example, for organizations to receive a single gift representing a full 10-20% of the overall campaign goal. If your organization is in a billion-dollar campaign, that means you probably need at least one donor who can give at the nine-figure level. Even institutions with an extraordinary prospect base do not have an infinite supply of such prospects. Thus, identifying the prospects who are capable of gifts at that level and gathering their private feedback on your campaign objectives is mission-critical if you are going to publicly announce your campaign goal with confidence.


Although capacity is crucial in finding a major donor who can make a considerable contribution to your campaign, it's important to delve into more than just wealth. You should also look at **how much they care about causes like yours** and how often they give. Fundraising Intelligence can provide this information, saving you time and effort when qualifying major donors.

THE QUIET PHASE:

# It’s quiet so you can listen.

When your organization takes a deep breath and jumps into a multi-year campaign, you begin what is commonly known as "the quiet phase."

The quiet phase is the period of time, often measured in years, before your campaign is announced to the world. It's a time to test your ideas, see what your most generous supporters will give, and course-correct if needed before you make a formal campaign announcement. And it's critical to take that time, because once you announce your campaign, you're strapped into the ride, unable to get out until the roller coaster comes to a complete stop.

The quiet phase is, therefore, a critical time for your campaign. This is the time to build the campaign's "nucleus fund," which is the amount of money you will have in hand before your campaign announcement. It is generally made up of major and principal gifts contributed by your campaign steering committee, members of your board, and other individuals and organizations that have been your most ardent supporters.

60%

The typical percentage of donations that are secured during the Quiet Phase.

The reason it's called "the quiet phase" is because the campaign has not yet been made public, but I like to think it's also "quiet" because it is the time that you are listening the most. It's an opportunity to ask important questions and listen to the answers even if they're not the ones you want to hear.

**First and foremost, you will want to be asking your organization's leaders about their vision for the future:**

- What will your organization need in order to carry out its mission in the years ahead?
- What would it take to increase the impact you make on those you serve?
- What is the world going to need your organization to become in the next five to ten years?

Only when you answer those questions can you answer the next one: how much money will it require for you to go from where you are today to where you need to be tomorrow?

The answer to that last question is the beginning step in determining a campaign goal. While you will need to consider other factors, deciding on a goal should begin with having an idea of what it will take, financially speaking, to truly transform your organization. If you don't stop and ask those critical questions first, your campaign goal is likely to represent the sum total of a wish list of items, each of which may be helpful but may not cohere into a larger vision that will propel your organization forward.

There is a story I heard from a campaign consultant once that illustrates what can happen when that foundational work isn't done. He said that an institution came to one of their largest and most loyal donors to ask that he commit an amount of money that would successfully bring them over their campaign goal. The donor said he wasn't able to commit to their proposal at that time.

Shortly thereafter, the organization's campaign team learned that their donor had made a much larger gift to a different organization. They were surprised that he turned down their comparatively modest request only to give a much larger gift somewhere else. The head of development decided to call the donor and ask if he would be willing to share why he chose to support the other organization instead of theirs.

> The donor said "You asked me to finish your campaign. They asked me to cure cancer."

## The quiet phase is the time to encourage your leadership to dream big dreams that will inspire donors to join you in a noble cause.

Campaigns are not an end unto themselves; they should have a greater purpose that is clear, exciting, and motivating to your whole community. The quiet phase is when you listen carefully enough that you can identify those dreams and synthesize them in a way that is meaningful to others.

One common approach that campaign teams take during the quiet phase is to engage the organization's top donors in briefing dinners. Briefing dinners are intimate events where the aspirations for the campaign are presented to key donors to gather their feedback.

These differ from the feasibility study in that they are social events, and opportunities for donors to have thoughtful, two-way conversations with each other and with your organization's leaders.

This is another moment in the quiet phase where careful listening is critical. By the end of dinner, you will know where you stand. If they seem riveted, or if they ask how they can help, you know you have a winning case for support. If, however, they seem skeptical, bored, or otherwise uninspired, it's important to listen to them and shift your approach. That can be a bitter pill to swallow, but if your very best friends aren't excited about the campaign, it's unlikely you'll be able to excite anyone else.

This doesn't mean you need to throw out your entire campaign plan and start over. Rather, think about how you're communicating with people and focus on answering these questions:

- What problem or problems does your organization help solve?
- How does your organization do that in a way that's uniquely effective?
- If your organization were to raise the funds you are seeking in your campaign, how would it become even better at fulfilling its mission?
- Why is it urgent to take action now?

**If you can answer these questions in a credible and compelling way, you should be able to develop a case for support that your entire community can rally behind.**

The best way to begin is to consider the quiet phase as the "listening phase." If you listen carefully to your organization's leaders and its lead donors, you will ultimately see your organization's objectives and your donor's objectives come together and become one. The path to getting there is difficult, but once you find it, your organization will know it can announce the campaign to the world with confidence.

THE KICKOFF:

# Focus on what *matters.*

For anyone planning or managing a comprehensive campaign, the campaign kickoff might be the most critical moment.

The kickoff marks the official turning point between a campaign's "quiet phase" and its "public phase," so it's the moment your organization reveals its plans and commits to finishing the campaign as announced.

The quiet phase that precedes the kickoff is a time to gather significant campaign contributions from your organization's most devoted donors. During that time, donors realize you're in a campaign, but the community at large has very little awareness of it, and certainly no specifics about the goal and timeline.

> When you reach the kickoff, your campaign goal moves under a spotlight for the world to see.

Marking the kickoff is often a gala event—or perhaps several in various regions where your constituents can be found. This event marks an excellent opportunity to motivate major donors to make their campaign commitment in time to be recognized and thanked during the celebration. And so, in the months, weeks, and days leading up to the event, at a time when you are most consumed with staging an event that everyone will find original, memorable, and gracious, you are also working at breakneck speed to close some of the largest contributions in your entire campaign.

As you might have gathered, launching a campaign is stressful. When I interviewed a variety of campaign directors in preparation for this book, each time I brought up the subject of the campaign kickoff I was met with a sigh. Having been a campaign director myself, I can tell you that the week leading up to the kickoff was among the most stressful in my life—far more stressful than my own wedding.

So, if you are in the throes of planning a campaign kickoff, the following is my advice for how to survive it.

# How to survive the weeks leading up to campaign kickoff.

Increasingly as the campaign kickoff approaches, every decision begins to take on a feeling of disproportionate significance. Who should be invited? How should donors be recognized? What will the program be? And the ever-dreaded event planning question: who will sit at the tables near the front?

And, invariably, there are worries. What if someone's name is listed incorrectly? What if a principal gift is made right after everything is printed? What if it rains during the outdoor portion of the event? What if there's a medical emergency? What if the honorary campaign chair calls that morning to say he can't make it across the city in time to make the keynote address?

My first piece of advice is to pause and breathe, remembering that just because the campaign and the event are important doesn't mean that every detail is important.

Who ordered the wrong paper stock for the invitations? Why don't we have engraved glasses? What if the campaign-branded napkin rings don't get here on time?

This type of momentary crisis happens in almost every campaign. When it happens, remind yourself that this is normal and expected, and that one day in the future it will even be funny.

60%

The minimum amount of your fundraising goal you should have by the time you go public.

## When you're in the throes of a campaign kickoff, it's common to lose perspective.

And when you do that, you run the risk of missing the most critical pieces. While the event must be done and done well, the primary focus of a campaign director must be meeting or exceeding your goal for fundraising by that milestone. The last thing you want to do is announce a campaign without enough funding in hand to be confident in your success. To do that, you need a minimum of 60% of the fundraising goal by the time you go public. Leave the event details to the event planning experts (hopefully you have some!) and concentrate on ensuring that you've raised enough money and developed enough of a pipeline to be confident that you will meet your goal.

In order to achieve that, it's mission-critical that you have developed clear, accurate, and strategic campaign analytics to support you in your work. If you can't quickly assess how much money you have raised for each area of the campaign, how many gifts you will need to meet or exceed your goal, and how many prospects it will take to close that many gifts, you are not ready to go public.

Many things that will seem important during the kickoff will become drops in the ocean of memory that floods you when you're looking back on your campaign.

I can't remember what we served for dinner that night, though I'm certain it was a decision that we sweated at the time. What I do remember very distinctly is this: when we launched our campaign, we had already raised 66% of our goal. I knew we had the prospects to get us over the finish line, and I even knew the ones we would return toward the campaign's end to ensure that we finished strong. (We did finish strong. Two years after announcing we revised our campaign goal, increasing it by about 20%. In the end, we raised 33% more than our revised goal.)

So, if you're in the midst of planning a campaign kickoff, my best advice is to keep your head on your shoulders. Plenty of gala events have had their share of mishaps that are barely remembered any more by those who attended. But people will always remember whether or not you met your goal, so make sure you have set your organization up for a resounding success.

THE PUBLIC PHASE:

# Keep your spirits up.

# Every campaign's public phase lasts the same amount of time: 100 years.

Of course, this isn't literally true, but it will definitely feel true when you're in the midst of the public phase. More than any other time in the campaign, the public phase is when you risk burnout and fatigue among staff members, volunteers, and even the donors themselves. And by some cruel twist of fate, combatting that fatigue generally falls to the single person who is the most tired and burned out of all: the campaign director.

Naturally, you can't begin to address campaign burnout until you can recognize when you're experiencing it. If the signals in the sidebar sound familiar, read on for some strategies for breathing life into your campaign again.

## Campaign burnout signs to look for:

There is a high rate of turnover on the fundraising team.

Volunteers are less engaged and begin to taper off their involvement.

You begin fielding requests to raise money for initiatives that aren't among the campaign's priorities.

There are downturns in fundraising activity, giving participation, or both.

# Reconnect with your mission.

Campaigns can make us so focused on fundraising goals that it's easy to lose touch with why we are raising money in the first place. When you're in the middle of a campaign, it can be surprisingly easy to forget that your primary objective is not to raise money. Rather, your objective is to support the mission your organization is raising money for.

If it's been a while since you and your colleagues had direct contact with the people who are served by your mission, you may want to consider creative ways of initiating that contact. You can do it in a way that's formal, such as inviting a physician to your development team meeting so you can hear firsthand about how fundraising has improved patient outcomes. Or you can do it more informally, such as eating in the student cafeteria and tuning in to the mixture of studious and joyful people that surround you. Whatever you do, make a point of reflecting on the good work your organization does and how you can share that positive story with your donors and volunteers.

# Hold a mid-campaign retreat.

Campaigns last so long these days it's inevitable that at some point your fundraising strategies will need to be refined. When you begin a campaign, you think about your top priorities and who among your most loyal donors might be interested in supporting them. But as time marches on, some donors don't behave the way we expect. Even happy surprises, such as getting a larger contribution from a donor than you originally planned, invite shifts in your fundraising strategy.

The perfect time to pause and regroup is during the very long middle of your campaign when momentum is waning. Armed with a few years of campaign progress, you and your colleagues can analyze the campaign's fundraising trends and use the insights you gain to develop a strategy that helps you finish the campaign on a high note. For example, if foundation support for a specific fundraising priority is trending lower than you expected, consider strategies for identifying additional prospects who might be able to help you cover the gap. This is a time for the entire team to be candid about what's working and what isn't so you can work collectively to overcome your biggest challenges.

21
Hidden
Gem
prospects

**A key group to look for when searching for additional prospects, are Hidden Gems.** These are donors who are already giving small to mid-level gifts to your organization, but are giving large gifts to other organizations. Thus, they have the capacity to give much more to you. Using Kindsight, you can uncover those who fit into this category, and otherwise might go unnoticed.

# Accelerate the "second track."

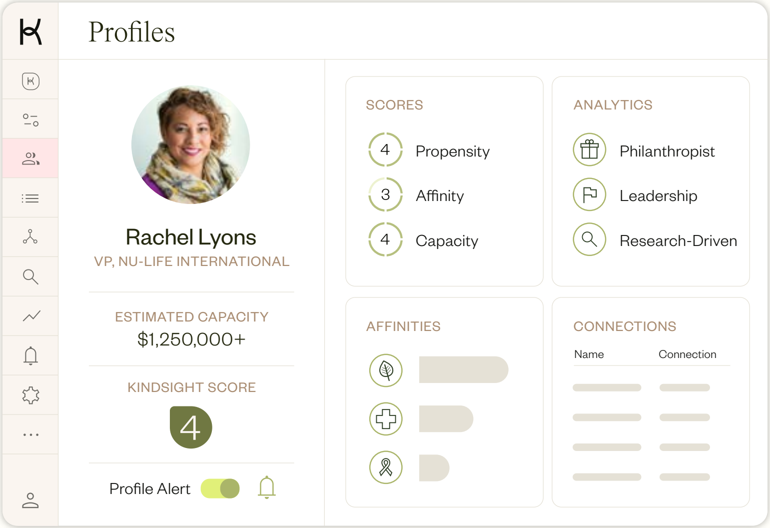
I like to think about campaigns as having two "tracks." The first track is the population of lead donors whose contributions will help you leap forward and announce the campaign goal with confidence. These are the prospects you knew you could count on when the campaign started.

The second track is the rest of your constituency, including current and potential annual fund donors, some of whom, with proper cultivation, will convert into major donors before the campaign ends. Most campaigns have several significant gifts that came from donors who were not on the radar during the planning phase.

So, while a predictive model is a critical part of the planning phase, developing a new model during the middle of the campaign often provides the "shot in the arm" that campaigns need to sustain momentum all the way to the finish line. An infusion of newly identified prospects can be just the thing to revitalize a campaign that's losing its verve.

Once you've successfully engaged with your known top donors in the Quiet Phase, it is essential to leverage other types of donors to drive momentum in the Public Phase.

The right fundraising intelligence tools can help you understand your database's full potential. It allows you to segment your donors and gain insights that help you make personalized, data-driven asks to the right individuals at the right time. You can also expand your search to the hundreds of millions of prospects in a donor database (like Kindsight's!). This ensures your outreach efforts are both targeted and effective, leading to increased campaign success.




Kindsight can help you identify current donors who could be giving more. Every donor has a Kindsight Score. The score analyzes the full picture of your donor: their propensity, affinity, and capacity to give to your organization. You can also use live profiles to keep your donor data up-to-date. Then, using generative AI, Kindsight can create a personalized outreach campaign that is sure to resonate with your prospective donor.

The public phase doldrums are real, and they happen even in the midst of the best campaigns.

More than anything, if you see signs that your campaign is losing energy, don't despair. Instead, try to welcome it as an opportunity to think creatively, bring new donors into the fold, and work to overcome some of your more vexing challenges. Acknowledging that you're in a lag and working proactively to address it will inspire your teammates to follow your lead. Before you know it, the end of the campaign will be on the horizon.

And always remember: the more you do to address momentum when the campaign is losing steam, the easier it will be for you to conclude the campaign with a strong finish.

CLOSING THE CAMPAIGN:

# Anticipate and plan for challenges.

You did it! You reached the end of your fundraising campaign, and hopefully, you've exceeded your goal.

Unfortunately, however, the campaign has only "ended" for the members of your community. As a campaign director, you still have a lot of work ahead of you.

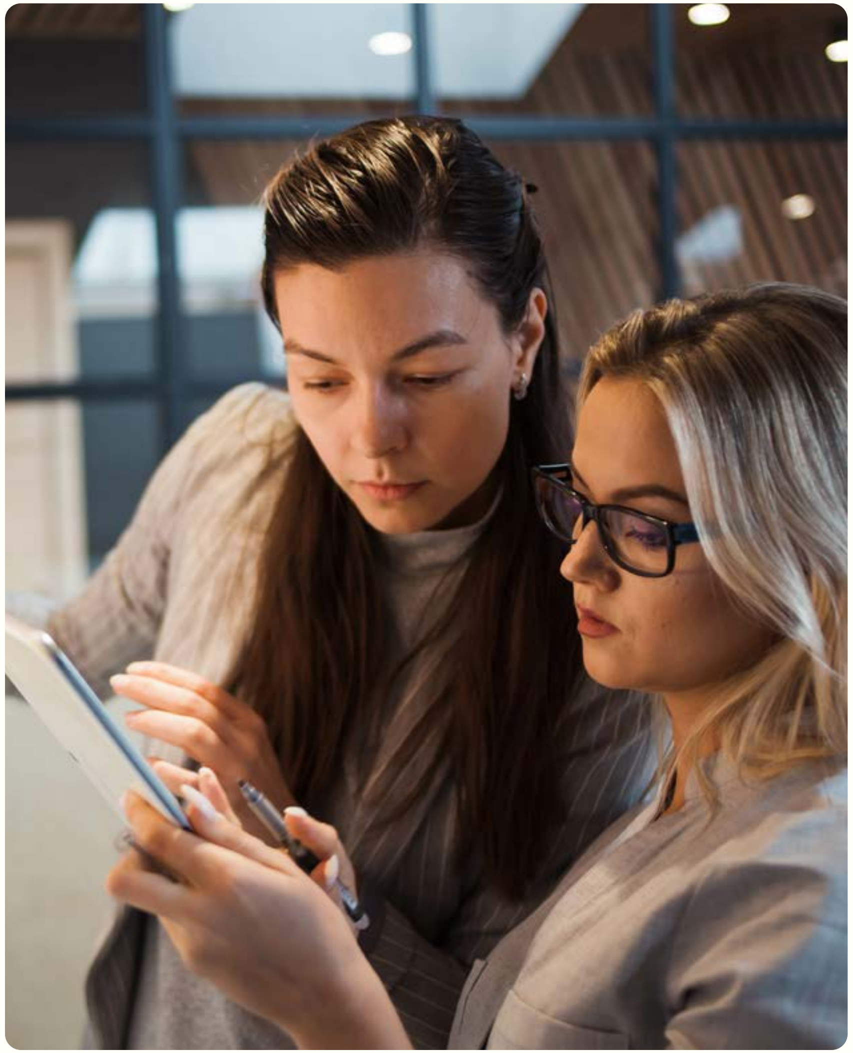
There is the closing celebration, of course. It must be as good or better than the kickoff celebration. Then there's all the additional thanking you will need to do: the letters, the donor walls, the plaques, the hard hat tours, the site visits to connect donors with beneficiaries. There's also no small amount of reporting you must provide to volunteers who will be eager to hear how their hard work paid off. The post-campaign analysis you need to conduct to ensure your next campaign is even more successful. In short, as you reach the end of the campaign, you are suddenly aware of how much work must be done before the campaign is truly finished.

There are several challenges you are likely to face as you come to the end of the campaign. Here are four you should expect to happen, along with tips for how you might overcome them:

# 1. Staff turnover.

Be aware as you get close to the end of your campaign, you will see a great amount of turnover. There are several reasons for this, but the main one is that people often want to stay in their jobs to see the campaign through to a successful end. In fact, brace yourself for the possibility that you could lose the chief development officer, the president of your organization, or even both.

If the thought of losing people all at once keeps you up at night, a good strategy is to think about contingency plans for how you might cover staffing gaps in the event of a key colleague's departure. Think about who else is on your fundraising team who might be able to take the work on, or consider whether there are other organizational leaders or volunteers who might be able to assist in the event of a temporary leadership gap.



## 2. Not meeting each and every goal.

Not meeting your overall campaign goal is truly a worst-case scenario, but typically you will have seen this coming and addressed it well before the campaign closes. A more common scenario, however, is falling short on one or more sub-goals of your campaign. Sometime near the middle of your public phase, take an honest look at how your sub-goals are progressing, and if you have concerns, formulate a plan. It may be that you need more prospects (Kindsight can help with that) or it may be that you need to revise the solicitation strategies for the prospects you have.

Regardless, prepare for the fact that you may not hit each and every one of the goals you set for your organization. If that happens, think about how you will communicate that to the volunteers and internal stakeholders who are likely to be disappointed. If you're close but just not at the mark, consider a post-campaign push to reach the finish line of the unmet goal. Recognize that your volunteers and top donors may be discouraged and think about how you can keep them upbeat. They will need to stay motivated and to know their work is valued.

# 3. Analysis paralysis.

The last thing you feel like doing at the end of a campaign is an in-depth analysis, and many campaign directors don't know where to start. But a detailed post-campaign study is critical to improving your fundraising program for the long term. Unfortunately, this analysis can't wait; it should be conducted while the campaign is still fresh in everyone's mind.

Compare your planning tools to the campaign outcomes: what went according to plan and what didn't? If you have areas that fell short of your goal, when did things get off track and why? Perhaps most importantly, it's important to understand whether the campaign has increased your "baseline" capacity to raise money, and by how much. A detailed data analysis is a great place to start and surveying your key volunteers and donors is also very helpful. Blending both qualitative and quantitative data, you will want to emerge with a 360° understanding of how you can make your next campaign even more successful.

If you're overwhelmed at the thought of conducting this much work just as the campaign winds down, consider retaining an outside firm that specializes in data analysis.

# 4. Donor fatigue.

At the end of your campaign, you will likely hear a lot of concerns about donor fatigue coming from staff and volunteers. Before you begin to address donor fatigue, however, make sure there is even a problem to address. Hopefully, you have been listening to cues from your donors, keeping them updated on what their generosity has helped you accomplish, and making sure they feel thanked in a meaningful way. If so, many of your donors might be ready to make another gift sooner than you think. If, however, you aren't sure you've conveyed your gratitude enough, there's no time like the present. Donors want to know they made a difference in the lives of the people your organization helps.

Bottom line: make stewardship an ongoing practice and try not to dwell on the notion that your entire constituency is tired of being solicited for money. As one of my friends likes to say, "don't write your own review."

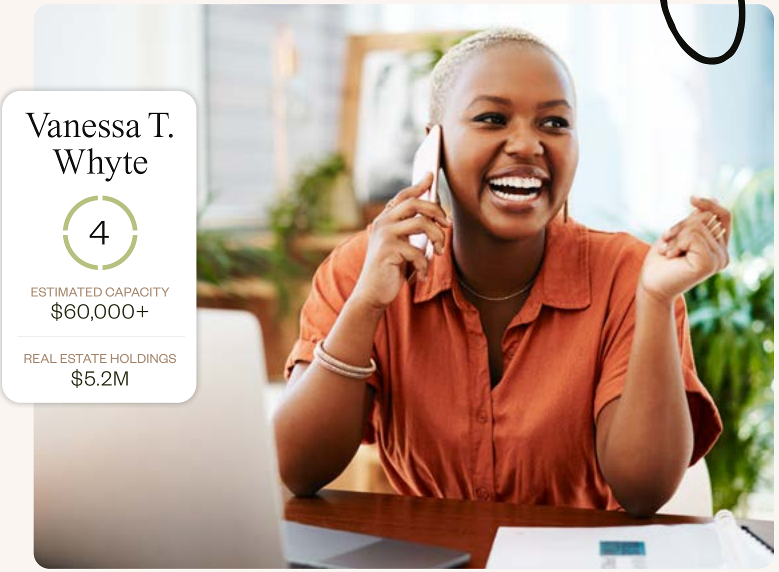
# Conclusion

## I want to conclude this with a confession.

When I was a campaign director, I spent many days feeling like I wasn't doing a good enough job either in my campaign role or in my advancement services role—or sometimes both. It felt like no matter what I was doing, there was always a list of things I wasn't doing. I only realized when I began to connect with other campaign directors how common that feeling is. A comprehensive campaign encompasses everything, so there is always more work to be done. Couple that with the dynamic so many of us find ourselves in of doing two full-time jobs at once, and you can get bogged down in feeling the weight of your responsibilities.

If you find yourself feeling this way, know that it's common and remind yourself of all the "wins" you helped your organization achieve. You were asked to serve in this role because you are good at what you do, and the new experiences you'll have along the way will be extraordinary professional and personal growth opportunities.

I wish you every success in your campaign!



## Kindsight builds technology that helps nonprofits make a difference.

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For 30+ years, Kindsight has supported fundraising organizations with purpose-built tools and the largest charitable giving database on the market. As a leader in fundraising intelligence, Kindsight leverages real-time data and emerging technologies to help organizations identify and engage with donors, and manage campaigns—at any scale.

The holistic platform includes four products, *iwave*, *engage*, *ascend*, and *connect*, that work together to deliver valuable donor intel and insights, generative AI that builds campaigns and creates meaningful outreach, and a CRM that corrals your donor information and campaign tracking into one place.

Connect your story to donors who care about your cause. At any scale. In real time.
That’s the power of Kindsight.