



Benefactor Group White Paper

CAMPAIGNS ARE LIKE MARATHONS

Running a marathon and implementing a capital or comprehensive campaign have a lot in common. You wouldn't show up at the starting line for either without putting in the necessary preparation. And you wouldn't start celebrating success at mile 17, when there's still a long way to go.

In this white paper, we explore the phases of a campaign and their contribution to a successful outcome through the lens of getting ready for and completing a marathon.





Phase 1: Campaign Planning: Training for a Marathon

"The marathon is an arduous event and requires dedicated training ... the more time you give yourself to train, the better your chances of success. [Not]} training for a marathon... is a surefire way to get injured or find yourself disenchanted."

-Jeff Gaudette, Competitive Runner

Get in shape

Few people can jump off the couch and run 26.2 miles; and few organizations can launch into a campaign without spending months—sometimes years—strengthening relationships and building a strong corps of engaged donors. Even if you are capable of the annual campaign “sprint,” you still need to take steps to be sure you can go the distance. And if your annual fundraising has slowed down, an exciting campaign can be one way to push through a plateau.

Now is the time to elevate fundraising: give donors more reasons to support your organization. Only a naïve organization believes in “saving donors” for a capital campaign by diminishing their requests for support in the preceding year. Step up everything: your case, your cause, your solicitations, and—especially—stewardship.

Build team endurance

A strong team helps to make a distant goal more reachable. For a nonprofit considering a campaign, that team includes an enthusiastic CEO; engaged board; and a skilled, willing team with enough bandwidth to take on additional work.

The months leading up to a campaign can be a good time to expand the staff, but be realistic about expectations. A new major gift officer can play a crucial role, but will need 18 months or more to hit their stride.

You'll need a full support team, too, generated through a strong, institution-wide culture of philanthropy.

Gear up

A campaign will make demands of your donor data. Do you know what prospective donors have the capacity and affinity to make transformational gifts? Can you get the information you need and conduct analysis to make good decisions? Do you have enough bandwidth on the research staff to support the uptick in demand for this data? Are your reports and KPIs (key performance indicators) ready for the scrutiny of the board and volunteer leaders? If not, now is the time to assess, clean up, add new tools (or perhaps replace altogether, because you don't want to be switching core systems in the middle of a campaign).

You'll also want to assess your digital fundraising tools. While the top tier gifts are critical, you need to have effective broad-based systems (e.g., online, peer-to-peer) in place to get you across the finish line.

Know the goal

It's more than choosing a dollar goal that is higher than your last campaign. It's about vision: what is your organization's “north star” that is driving your campaign? How will that proposed building elevate your mission? How will expanded programs magnify impact?

Proposed campaign goals are often the natural result of a thoughtful strategic planning process. And when that planning process engages the very stakeholders who you'll call on during the campaign, you've set the stage for success.

Check list complete, ready to go? Not quite. Before stepping up to the starting line, step back, assess, and be sure you're prepared for success.

Phase 2: Assessment

Before you start a campaign, you'll need to know that it's likely you can reach the final goal. And you'll want to identify the obstacles that might slow your pace. That's the role of pre-campaign assessment.

Test your limits

Every marathoner knows the value of the 20-mile run. For most, this is the longest practice run: the final test. If you can endure that 20-mile route—your knees don't give out, your energy gels last, your gym shoes stay intact—you'll be ready to take the starting line.

A campaign assessment, like the infamous 20-mile run, answers long-anticipated questions: are you really ready? can you reach the goal? It typically includes interviews with the donors and leaders who will be counted on most—usually conducted by an objective outsider (i.e. consulting firm). It may also involve analysis of your donor data.

Know the course

Where are the “heartbreak hills” that will test your will? When will you turn a corner and find a strong headwind?

It's impossible to know everything that you'll encounter. After all, the typical campaign lasts more than four years, so there will be economic ups and downs, new philanthropic players, emerging fundraising technologies.

Knowledge of the philanthropic landscape will help you take these obstacles in stride. Consult with experts like Giving USA® and the Fundraising Effectiveness Project so that you can anticipate changes. Keep your teammates (especially key volunteers) informed so that they will stay the course—not overreact—when those inevitable speed bumps occur.

If you've done everything right, then you'll have a cadre of eager supporters. They've been engaged throughout the planning and assessment process and they believe in the campaign's goals.

Some can't wait for that starter's pistol to sound—and that's o.k. If donors want to show their support by making an early pledge, they can be recognized for a “qualifying reach-back gift”, which can be counted toward the campaign goal, recognize the donor's zeal, and ensure the campaign gets off to a fast start. It's a clear indication that you are warmed up and ready to go.



Warm up

Phase 3: The Early Phase

"Race Day is a roller coaster ride. If there's one thing you can count on the morning of your race, it's that you should expect the unexpected. But fear not because that is what you've trained for!"

Whether the phase is called "silent" or "pacesetting" or a similar term, a campaign begins quietly, with little public fanfare and a lot of work behind the scenes.

Get off to a good start

In a marathon, the starter's pistol sends off the runners. But when does a campaign start? Most often, a campaign's official launch is the date the governing board adopts a formal resolution to support the campaign and devote the necessary resources. The wording of the resolution—and the strategic selection of board members to move and second the motion—matters. And, just like a runner might jog up to the starting line, a campaign can also benefit from a handful of "qualifying reach-back gifts."

Set an inspired pace

In the early stage, the campaign case is honed, campaign marketing starts to take shape, and donor recognition opportunities are established. Often the earliest gifts are secured while these tools are still in draft form. That's o.k. These early donors are likely to know the story well and are eager to set a pace that will accelerate progress.

Track progress

It's more than simply counting dollars raised and distance to the goal. It's important that campaign gifts be tracked against the gift chart: that the largest gifts are committed early, and that insider constituencies such as the board and leadership team demonstrate their willingness to support the campaign.

Push through the tough parts

Every campaign hits at least one "wall": a dry spell when the gifts are slow; a sudden, unplanned change in leadership; or some other unforeseen challenge. During these delays, it is critical to keep leaders focused on the vision (the reason for the campaign, not the dollar goal). Use the time to finalize campaign tools and to nurture donor relationships. Return to the basics, and you'll be back on pace soon enough.

But it's not time to "go public" and celebrate success just yet. Next, we explain why a "quiet phase" strategy is so important, and when and how to launch into the public phase.



Phase 4: The Public Phase

“Think of your biggest goal. Imagine telling someone what you’re going to do. Doesn’t it make you feel good? Well, you should have stayed quiet, because psychology proves that good feeling now will make you less likely to do it.”

A campaign generates excitement

As it progresses and the tally of gifts grows, there’s a strong temptation to call the media, unfurl banners, and let the world in on your success. But a large body of research—and accumulated experience—suggests that the best strategy is to keep a low profile until specific criteria are met. If you start sprinting too soon, you’ll risk dragging across the finish line.

Wait until 67% of the goal is reached. By the time most marathoners reach mile 17, they may be tired and bruised—but with so many miles behind them, they are at last confident they’ll reach the finish line. Similarly, it’s wise to wait until a campaign has reached two-thirds of its goal before making any public pronouncements. Anecdotal support for this strategy is bolstered by the Science of Philanthropy Initiative, especially the experiments that Dr. John List and Dr. Uri Gneezy describe in their book *The Why Axis*.

Take measure

Now that you’re mentally resolved for success, you have a final chance to hone messages, refresh the volunteer corps, adjust campaign objectives, and raise—or lower—the goal. (Because once you have that banner headline, you’ll be determined to stay on course!)

Run with a pack

During this phase of a marathon, it’s important to lean on your pace group or partners. In this phase of a campaign, lean on your “insiders.” The campaign’s early phase will have provided myriad opportunities to confer insider status on donors, volunteers, and advocates. Now, leverage these ties to close gifts, recruit the next tier of campaign volunteers, and celebrate early supporters. A longer early phase

provides more occasions to practice social norming and bind enthusiasts to your cause.

Envision the finish line(s)

As the grind of a marathon wears on, veteran runners will envision the finish line—and even set mini-milestones: reaching the next landmark, then the one after that, and so on. Campaigns use this tactic, too. As fundraising persists, volunteer enthusiasm begins to lag, and donors need a reason to stop procrastinating. The public launch can serve as that interim milestone and unleash the campaign to make subsequent pronouncements that create additional strategic milestones.

Guts and glory

Yes, those final miles are tough. Concentration wanes, and muscles tire. But they’re also where resilience is built. For a nonprofit organization, the public phase is ripe with opportunity: to create or strengthen a middle giving strategy, broaden the base of direct-response donors, and elevate institutional profile. But public attention also wanes, so it’s best to roll out these tactics when success is within reach.

And as you cross the finish line, arms raised in triumph, there’s a temptation to crumble to the ground for a well-deserved rest. Don’t do it! Just as a finisher needs a long victory walk to cool down, a successful campaign needs to take stock.



Phase 5: The Capstone Phase

Euphoria comes at the end of a campaign, but so does exhaustion. You have spent many months planning, organizing, marketing, and fundraising—by the time you reach your goal, you might be tempted to take a well-deserved rest! However, just like a runner needs to cool down after a race, fundraisers also have a few more steps to take before concluding a campaign.

Celebrate

First and foremost, take time to celebrate the hard work and energy you and your team have poured into the success of your campaign. Executing a capital campaign, like running a marathon, is not something everyone can say they have accomplished. A campaign requires endurance, dedication, and endless optimism—so, as you cross the finish line, take time to celebrate! Display your medal, hug your fans, or perhaps enjoy a festive libation. Be proud of your accomplishments—you deserve it.

Take stock

At the end of your race, reflect objectively on how you ran it—and how you might improve next time. Reviewing your successes, challenges, and puzzles provides valuable insights for future fundraising goals. By examining instances where a different approach could have led to success, you will be better prepared for your next campaign.

Say thank you

A marathoner does not reach the finish line alone. From the friends that cheer you on, to the fellow runners that push you to move a little faster, to the volunteers that support you, marathons are about community.

Campaigns also take a village, and the conclusion of a campaign is an excellent time to show gratitude. Thank every major donor, board member, and campaign volunteer that made success possible: throw a celebratory dinner, call and send handwritten notes, invite donors on tours or grand openings. This attention to detail will help nurture supporters or transform one-time donors into recurring ones.

Share your success

Throughout the community, many people will be invested in your campaign and will want to know about your success. Share your impact with broad-based donors—let them know what their investments made possible. Send a stewardship report to donors; discuss campaign impact in newsletters and on your website. And don't forget to include stories! These communications will substantiate your ability to use funds effectively and strengthen donors' trust.

Start planning for your next race

This experience will be invaluable as you consider your next race—even if it's not another full-blown marathon! Leverage your successes, challenges, and strengthened fundraising muscles to boost your annual giving, plan for a major gifts initiative, or kickstart your planned giving program. Embrace it: you've caught the running bug.

Everyone approaches a marathon differently. No matter which type of runner you are, the steps for successfully reaching the finish line will be the same. Prepare: check that you are able to reach the final goal; identify any potential obstacles along the way. When setting out, maintain a manageable pace, and refrain from sprinting too soon. And after crossing that final threshold, celebrate, say thank you, share your successes—and remember to keep moving forward.

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