CHAPTER 2

Getting Ready for the Campaign

How do you know if your organization is ready for a capital campaign? In this chapter, we'll consider the timing of a campaign, and give you some questions to ask and tools to use, all to evaluate your organization's campaign readiness.

We'll examine your campaign readiness in a few different ways: from a broad institutional perspective and also from a nitty-gritty, inside-the-development-office perspective. You'll also find a tech checkup tool to help ensure that your technology is in good shape for the campaign. And finally, I'll share a few time-tested tips for working smart and surviving campaign ups and downs.

This chapter covers:

- Time for (another) campaign?
- Institutional perspective: elements of campaign readiness
- The importance of planning
- Campaign readiness: inside the development office
- Tech checkup: assessing your tech readiness
- Tips for working smart and surviving stress

Time for (Another) Campaign?

Before jumping into a campaign, ask yourself this: has your organization ever conducted a capital campaign before? If so, how long ago?

I recommend that your organization consider conducting a capital campaign at least once every 10–12 years.

A 10-year period gives donors the chance to finish paying their pledges and get used to making larger annual fund gifts. Ten years also gives your organization time to wrap up projects and start planning for your next big growth spurt. You can see what the cycle might look like on the following page.

If this cycle lags too much at any point, it can be hard to gather the momentum you need to move to the next step.

When done correctly, your capital campaign process both strengthens relationships with your existing donors and builds relationships with new donors. A well-run campaign will effectively lift your organization's capacity to raise funds for its mission.

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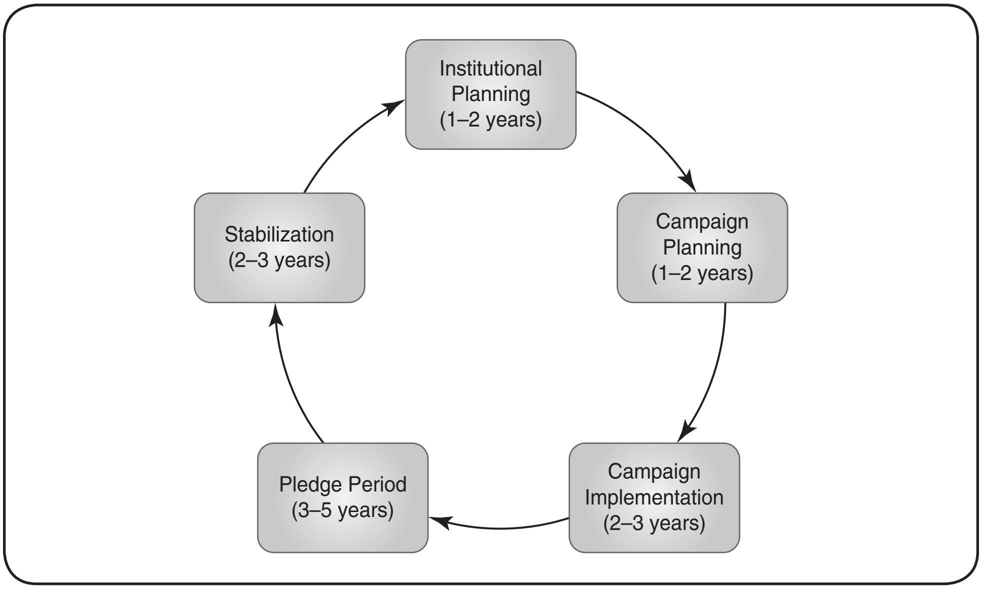
EXHIBIT 2-1 Campaign Cycle



Institutional Perspective: Elements of Campaign Readiness

To move into a campaign, your organization doesn't have to score perfectly on every checklist and test. What you must do, though, is design your campaign around your existing strengths. You also must shore up your weakest links and dig in right away on creating the systems you'll need that don't already exist. This is true for every organization, even if you think that you absolutely must start raising the funds for a new building or program right away.

If you haven't had the time or resources to put every element in place prior to jumping into your campaign, then you're in good company. Many (even most) organizations begin their campaign planning while building their strength. Look at the areas in which you are more or less prepared and use those strong elements to inspire and motivate other changes that you've long known (or recently discovered) are needed.

If you flip back to the simple campaign readiness test I provided earlier (p. 7), you should be able to develop a good working list of the specific elements that should be in place (or at least in progress) before you launch your campaign.

You can use this test to focus the attention of your board and leadership staff on the basics, and invest your energy and resources in shoring up any wobbliness in these areas. (I've also included the Campaign Readiness Test as a downloadable resource on the website, capitalcampaignmasters.com/strategies so that you can adapt it to meet your needs and circulate it among your key staff and board members.) The more shared understanding you can develop about the campaign, the more smoothly it's likely to go.

Mission, Vision, and Values

While most organizations have a clear mission statement, fewer have devoted the time and energy to articulate their vision and core values. These are important, both for your organization and for your capital campaign.

Your mission is a concise expression of what you do and why you exist. Your vision lays out, in aspirational terms, the results your organization is trying to accomplish over time and how the world will be different because of your work. Your core values describe the principles that guide everything you do.

Together, these documents are the touchstones for your organization. They can (and should) frame the conversations that you have about your work. They also should be a big help in shaping your plans for the future—including how you will conduct your capital campaign.

An Informed Constituency

A successful campaign needs a base of support—a group of people extending far beyond your inner circle of board and staff—who know and understand your work, and who will be excited to give. Your capital campaign will certainly increase this group of supporters, but you must have a solid group in place before you start planning your campaign.

If your donor list is small, or the donors on that list are silent and uninvolved for much of the year, you may want to take steps to engage and build your donor group in the years (or even months) leading up to your campaign.

Involved Governing Board

Your board members set the organization's direction, play a key role in shaping policies, and supervise your organization's management. And they're responsible for the financial health of the organization. Your board's engagement (financial and otherwise) in the campaign sets the path for other donors to follow—so you'll want to make sure that board members are leading well.

Organizational Planning

Before you step into your campaign, you should have a written plan that charts the course of your organization for the next three to five years. The plan should highlight your vision, mission, and values. It should also state your goals and objectives, as well as cover the specific programs and budgets that will help you achieve those goals. The board and others close to your organization should be involved in creating the plan. Through their involvement, these key people will feel invested in the program and able to make a strong case for its financial support.

Niche Awareness

Are there other organizations in your community that do similar work? If so, you must clearly communicate the unique role that your organization plays, and why it's important. If prospective donors believe that you provide the same services as another agency, you'll have to go to extra lengths to persuade them that your campaign will create a worthwhile impact.

Prospect Research and Development Plan

Your organization should have an intentional, ongoing process to identify, research, and cultivate donors who are willing and able to give capital campaign-sized gifts.

Information Systems

Your information systems should allow you to track program information and impact and also financial and fundraising information. You'll also want to be able to track and record the work your volunteers are doing. Every database has its challenges, but as you enter the campaign, you want your challenges to be in the "manageable" category.

The expression "garbage in, garbage out" rings especially true for databases. Make sure that everyone in your office is (correctly) using your systems, because the reports you retrieve are only as strong as the data entered into your system.

Communications Plan

As you ask yourself if you're ready for a campaign, think about this: Does your organization have a constituency-wide communications plan? Do your communications build a warm, supportive relationship between your organization and your community?

Your communication style should be consistent across platforms. Your organization should have a recognizable voice and point of view that comes across in all of your materials.

The Importance of Planning

Campaigns grow out of strategic planning. The strategic-planning process is about more than evaluating programs. Good strategic plans take a look at the big picture. The strategic-planning process might give you a place to tackle questions that you can't easily discuss anywhere else about your organization's relevance, effectiveness, and direction.

Through a strategic-planning process, your board, staff, and community come together to redefine the organization. Working together, you shape its future directions. You envision sometimes new and innovative ways to achieve your goals. Your strategic-planning process asks not only what is true now, but what is possible in the near future.

It is often through this latter query that the objectives of a capital campaign emerge.

For some organizations, the push for a capital campaign precedes strategic planning. An ambitious executive director or board chair with little tolerance for collective process might set a plan by decree rather than through strategic planning. In some cases, external factors, such as a natural disaster, an unanticipated facility move, an unexpected merger, or even a windfall grant for a new program,

Designing as We Went

We were busily raising money even as the foundations on our new women's pavilion in the health center were being poured. We'd been talking with several major donors about naming rooms in this part of the project.

Imagine our surprise when we learned that the plans we'd been showing our donors were outdated, and that the project had shifted from one floor to two! We went back to our donors and rolled new plans out for them to look at. Lucky for us, they were delighted to hear that the project had expanded and gave generous gifts—even though it was clear to everyone that we were designing as we went!

—VP of Advancement, Health Foundation

can cause an organization to reevaluate an existing plan and decide to embark upon a capital campaign.

While this is far from ideal, if these are your circumstances, you may still be able to find a path to a successful campaign. You're going to have to work harder, though, to build ownership and commitment to the project through your campaign planning process. You should use every step of campaign conceptualization and planning to actively engage people in discussions about the campaign's objectives and the organization's future.

If your goal is a new building, specific project plans—site maps, blueprints, and cost estimates—will give you props for your conversations with donors. If you are starting a new program, the budget projections, estimated numbers of people to be served, and timetables will become the talking points for donor conversations. Even an expansion of your endowment must be justified by a coherent plan that outlines your goals, timeline, and rationale.

Project designs for buildings or new programs are often being developed at the same time lead gifts are being solicited. To begin your campaign, you'll need enough clear planning to explain to donors what their gifts will accomplish. At the same time, you should maintain enough flexibility to accommodate inevitable changes to your plans as they become reality.

If you are estimating your project costs at the same time you are planning your campaign, be sure to estimate on the high side. The consequences of not being able to complete the project because your estimates were too low is far worse than setting a working goal for your campaign that is higher than you will need.

In addition, your credibility will depend on a clear business plan. Your plan should outline the costs of operating your new facility and lay out a reasonable strategy for raising those funds. Your business plan should include start-up costs for staff, utilities, building maintenance, insurance, and all the other ongoing costs of running your expanded operations.

Campaign Readiness: Inside the Development Office

As a general practice, you should review your development shop's processes from time to time. And you definitely must have your development office in order before you take on a capital campaign.

If at all possible, though, the people inside the development office shouldn't be the people who do that assessment. It can be really difficult to see problems you've learned to work around. Instead, hire an outside consultant to evaluate your development office and point out areas that need to be updated. The consultant should take a hard look at your nonprofit's development programs, personnel, and internal communications, not to mention your IT and data systems.

The processes you're using now may be good enough for your annual giving program, but the pressures and added work involved in a capital campaign will increase severalfold any current challenges. A well-oiled, efficient development office will have a much easier time, not only for your campaign, but also for your ongoing development operations.

Talk openly with your development staff about the reasons for the assessment—and take care not to shame or blame anyone for areas that require work. The assessment process will be much more effective if your staff feel safe to share their practices and challenges openly. If they feel fearful or defensive, the assessment will be less likely to show the full picture.

The following questions might help you think through or review each system in your development office. If you engage a consultant to do the assessment or audit, they will have their own questions and format, but if you are conducting your own these questions will be helpful. A consultant will provide you with a written report and recommendations. And if you're taking stock of the development office yourself, take the time to prepare a written document that outlines your practices and recommendations for each topic. Note areas where you're strong and areas that need improvement and investment.

This process will give you a fresh lens on your systems and processes. It will also be a great tool to help you make a strong case for any additional staffing and resources you'd like to have before you begin your capital campaign.

Your Development Office: An Evaluation of Systems and Structures

Administration

- Do the top administrators spend time and energy planning for the future?
- Do the top administrators have a good working relationship with the board?
- Are the top administrators planning to stay in their jobs for the duration of the campaign?
- Are the top administrators visible in the community and among your major donors? Are the top administrators actively involved in fundraising?

Credentials

- Do you have written confirmation of your 501(c)(3) status from the IRS?
- Is your organization registered to raise money in any state where you will be soliciting? (Many states require registration if you solicit donors who reside there, even if your organization is in another state.)

Development Program

- Do development initiatives routinely meet or exceed their goals?
- Does the development department conduct periodic planning sessions?
- Does the development office have a sufficient expense budget?
- What's the return on investment of the development office's budget?
- Is the overall development program innovative and creative?
- Does someone on the staff or board have a solid and congenial relationship with each of your top 30 donors?

Staffing Structure and Leadership

- What are the primary development-office staff positions?
- Are the job descriptions for these positions in keeping with the actual work of the people in those jobs?
- How is individual performance measured or how are individual staff members evaluated on their performance?
- Are staff members accountable for results?
- How do the members of the development staff coordinate and share information?
- How does the development program involve volunteers?
- How will staff roles shift to accommodate a capital campaign?
- What additional staff will be needed? When?

Annual Giving

- What fund development goals do you set and report on?
- How do you set goals for annual giving?
- How are membership programs and special-event fundraising incorporated into the annual fund?
- Do you have annual gift clubs? If so, how are they promoted?
- Has the annual fund grown over the past five years?
- What are the key trends in the giving patterns over the past five years?
- Does the annual giving program have a major gift component?

Major Gift Program

- Does your development office have a major gift program?
- How many qualified major gift prospects do you have?
- How is someone identified as a major gift prospect?
- How are major gift prospects cultivated?

- Who manages the major donor cultivation and solicitation process?
- Do you have individual cultivation plans for donors who have the capacity to increase their gifts substantially?

Corporate and Foundation Relations

- Who handles corporate and foundation relations?
- Is the organization proactively researching to identify potential corporate and foundation donors?
- How does this aspect of the development program overlap with the annual giving program?

Endowment and Planned Giving Program

- Does your organization have an endowment?
- If so, do you have written policies governing the use of the endowed funds?
- Does your organization have a planned giving program?
- Is the program actively promoted?
- Are volunteers involved in identifying and developing potential donors?
- Is there a planned giving committee?
- Is there a planned giving recognition society?
- Is the planned giving program appropriate for the size and maturity of the organization?
- Does the organization maintain an up-to-date planned giving inventory of bequest expectations?
- Is there an active committee that manages the endowment funds?
- Are endowment results communicated regularly to past endowment donors?

Prospect Research

- Is there a clear and regular process for obtaining information about donors?
- Is someone responsible for managing information about donors and prospective donors?
- Does the organization have a list of major gift prospects identified for more research?
- Is there a process to refresh and renew this list?
- Does the staff member responsible for prospect research work closely with the major gift team?
- Is information about donors and prospects effectively captured, maintained, and stored?

Gift Accounting and Acknowledgment

- Is your system for depositing and recording gifts efficient, well organized, and documented?

- Are all gifts acknowledged within 48 hours of receipt?
- Does your system provide for different thank-you procedures for gifts of different amounts?

Donor Relations

- How do you develop relationships with donors and prospective donors?
- In what ways do you reach out to past donors?
- Do you have a clear, efficient system in place to guide these processes?

Volunteers

- Does your development office use volunteers?
- Is there a system for identifying and cultivating volunteer leaders?
- How are your volunteers recognized for their service, both officially and unofficially?
- Are volunteers adequately trained for the jobs they're asked to do?
- What role does your board play in the development process?
- Is your board's leadership active in the broader community?
- Do you have enough volunteers to execute the development plan?
- Are your volunteer positions clearly structured, with job descriptions, timetables, and so on?
- Have your staff members who manage volunteers received solid training in volunteer management?

Culture

- Does your development office actively celebrate its successes?
- Does the development department have a statement of values or ethics?
- Does the development department have a clear statement of confidentiality?
- Are values and ethics discussed regularly at development staff meetings?
- Does your development staff interact regularly with your program staff?
- Do members of the development staff treat one another the way they treat their donors?
- Does the development staff feel ownership of the fundraising plan?
- Does the development staff feel empowered to move ahead with the fundraising plan?

Communications and Public Relations

- Does your development staff work with the communications, marketing, and public relations staff?
- Are the development office's messages in sync with the communications office's messages and vice versa?
- Do the publications for communications and public relations support and coordinate with fundraising initiatives?

Gift Processing

Checks: Write a step-by-step description of what happens to a contribution check from the time it arrives in the mail until it's deposited in the bank.

- Who opens the envelope?
- What is done with the envelope and any note or other enclosures?
- Who records the gift amount?
- Is the pledge form or remittance enclosure saved with a copy of the check?
- Is the gift amount credited to the specific fundraising program that generated it?
- What other information is recorded from the check?
- Are the address and spelling checked against the donor files and recorded if new and, if so, who does this task?
- Is the phone number checked and recorded?
- In whose name is the gift acknowledged?
- Whose name is used if the check is in two names, but the note is only in one name?
- What name is used if the check comes from a business or foundation?
- How are memorial gifts credited, to operating expenses or to endowment?
- Is there a policy that guides to which fund bequests are credited?
- Who records specific donor instructions, and where are they recorded?
- Do at least two people record the amount of the check?
- How are the receipt figures reconciled?
- How often are they reconciled?
- Is the check copied before it's deposited?
- Are checks of every amount processed in the same way?
- Is the development director notified when a large gift is received?
- Have you defined what qualifies as a large gift?
- How many days elapse between the receipt and deposit of a check?

Pledges:

Prepare a written description of the procedures for handling pledges.

- Who records the pledge?
- Is the total amount of the pledge recorded?
- How are future payments recorded?
- Is there a system for sending payment-reminder notices?
- Are reminder notices used to convey other information about the organization?

Securities:

Prepare a written description of the procedures for handling a gift of securities.

- Where is your organization's brokerage account?
- Who is your broker?
- Who pays the broker's commission?

- Who is responsible for overseeing the transfer of securities?
- How do the finance department and the development department interact with regard to the transfer of securities?
- How do you track securities that have been transferred to the organization's brokerage account without a donor name?
- Is the information that donors need to transfer securities (name of the organization's broker and account number) easily accessible?

Gift Acknowledgment

Describe the procedures and policies for acknowledging gifts in your organization.

- Does every donor receive a gift receipt?
- If not, which donors receive receipts and which do not?
- What information is included in the receipt?
- Is the receipt information incorporated into the thank-you letter?
- How many thank-you notes do donors receive?
- Who writes thank-you notes?
- Who signs thank-you notes?
- Are some thank-you notes individualized? Which ones?
- Are some thank-you notes handwritten? Which ones?
- Do some typed letters have handwritten personal notes added to them?
- Are there different thank-you-note policies for gifts of different sizes?
- Are donors of gifts of certain sizes thanked by phone or personal email? If so, who does this?
- What internal mechanisms trigger thank-you notes, phone calls, or emails?
- Is a family member notified when you receive a gift in memory of someone who has died?
- Are donors of memorial gifts thanked in a special way?
- If a gift was solicited in person, how is the solicitor informed of its receipt?
- How many days elapse between the receipt of a gift and mailing the first thank-you note?
- If a donor is to receive more than one thank-you note, how are the notes scheduled?
- How are donors of in-kind gifts recognized?
- Are donor names published in the annual report?
- Are donors listed alphabetically in the report or alphabetically within a giving category?
- Who keeps track of donor names for the annual report?
- Do donors have an opportunity to request that their names not be listed?
- How does the organization determine how each name should be listed?
- Are records kept or copies made of thank-you letters and emails sent to donors?
- What determines when a hard-copy file on a donor is opened?

- Are donors recognized for cumulative lifetime giving?
- Are donors specifically thanked at the end of the year for their cumulative contributions for the year?
- Is any sort of memento used for recognizing donors at different giving levels?

Gift Accounting

Describe the policies that guide how and when gifts are counted toward specific fundraising goals.

- Who tallies the gifts that come in for the annual giving program?
- Is there a specific time period, with a beginning and end, during which gifts are credited to the annual giving campaign? To other campaigns?
- Is the full amount of a pledge counted in the year it's received?
- What is your organization's policy on writing off unfulfilled pledges?
- How are gifts of stock or other securities valued?
- How are gifts of life insurance counted? How are deferred gifts counted?
- How do you record and count in-kind gifts?

Donor Information

Describe the system for gathering, updating, and tracking information about donors:

- Who is responsible for gathering information about donors?
- Who researches information about donors from newspapers and other media?
- How is donor information captured and stored?
- How is the mailing list updated?
- How often is the mailing list periodically purged of non-responders?
- What guidelines are used to purge the mailing list?
- Where do new names come from?
- Whose job is it to assemble them?
- How are addresses updated?
- What are your policies guiding the amount of information you gather about donors and prospects at different giving levels?
- What percentage of your donor base has telephone numbers? Email addresses?
- What percentage of your donor records include information beyond the basic name, address, email address, and phone number?
- Do you have information such as hobbies, alma mater, children's names, gifts to other organizations, and birthdays for your top 100 donors?
- What are the mechanisms for obtaining information from the donors themselves?
- What guidelines do you have about what types of information should be gathered?

Volunteer Information

Describe the ways in which information about volunteers is gathered and stored.

- Do you have accurate, regularly updated records of all volunteer work?
- What information about volunteer activity is systematically recorded?
- Do you keep track of the dates people volunteered, the tasks they performed, and the number of hours they worked?
- Can volunteers be sorted in your files by specific activity?
- Can volunteers be sorted by date of involvement?
- Do staff members evaluate volunteers after each assignment?
- Are such staff evaluations summarized or indicated in the volunteers' records?
- Are volunteers thanked promptly and personally for their work?

Tech Checkup: Assessing Your Tech Readiness

Just as is true for so many areas of our lives, modern technology has changed the landscape of capital campaigns. Most of this change has been very positive. By using technology in smart and creative ways, you can communicate via video chat with donors who are far from your development office. You can share up-to-the-minute campaign updates with a massive network of people, and you can conduct in-depth prospect research with just a few keystrokes—and so much more.

Having strong systems and practical know-how to use technology well in your campaign can save you time and money. Your technology can help you connect with your donors and volunteers in a way that is perfectly suited to their preferences and schedules.

Similarly, having insufficient or out-of-date technology—or tech tools that you and your staff don't know how to use properly—can cost enormous amounts of precious time. You might also leave potential donations unclaimed or artificially limit the size or scope of your campaign. And, in some cases, sloppy or old technology can result in embarrassing or destructive breaches of sensitive information or mistakes in donor communication.

As you think about your campaign readiness, look closely at the tech tools that you are using and make sure they are up to date. This is also a good time to learn about new or emerging technologies that could help you overcome barriers or open new doors in your campaign.

You can download and complete a campaign tech readiness checklist from my website at capitalcampaignmasters.com/strategies.

Technology systems often straddle many departments at an organization. Remember to look outside the development office at areas like finance and communications to holistically assess your technology for campaign readiness.

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EXHIBIT 2-2 Tech Readiness Checklist

Instructions: Review the items on this Tech Readiness Checklist to better understand your needs. You will find an interactive form of this chart on Capitalcampaignmasters.com/strategies under Chapter 2.

Category	Indicator	No	Somewhat	Yes	I don't know
Communications	We have a bulk email system (something like Mailchimp, Constant Contact, Vertical Response, or Covio - or one of hundreds of others) that we use to communicate with our constituents.				
Communications	We do not send bulk email to anyone who has not subscribed, donated, or signed up to volunteer.				
Communications	We have an opt-out system where people who do not wish to receive bulk email from our organization can easily unsubscribe.				
Communications	We have social media accounts and staff assigned to manage them.				
Communications Score					
CRM	We currently have a constituent database (aka donor database) that allows us to store donation records, contact information, notes, and tags in donor records.				
CRM	We currently have a constituent database that lets us assign a solicitor to each donor prospect.				
CRM	Our donor database allows us to assign different levels of access to different users.				

CRM	Our constituent database (or another system) allows us to track volunteer contact information, activities, and committee assignments.				
CRM	Our donor records are generally pretty up to date: correct address and contact information, few or no duplicate records, and updated notes about recent interactions are in the record.				
CRM	Our donor database can generate reports about gifts, including LYBUNT and SYBUNT reports, top donor reports, and donation reports during a specific time period.				
CRM Score					
File Storage	We have a central network where all staff can access and save files and resources.				
File Storage	We have an organization-wide backup system that regularly backs up all of our files and documents.				
File Storage	Our donor database is backed up regularly, ideally once a day.				
File Storage	We have a protocol for naming files, versions, and folders so items are easy to find.				
File Storage	We use a cloud-based collaboration program (such as Google Drive, Dropbox, Microsoft 365, or Box) to share information.				

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Category	Indicator	No	Somewhat	Yes	I don't know
File Storage Score					
Policies	When someone (staff or volunteer) joins our organization, we follow a protocol for assigning them appropriate logins and passwords.				
Policies	We have an organizational policy about the use of personal devices for organization business.				
Policies	Our organization has a cyber security insurance policy to cover us in the event of hacking or fraud.				
Policies	We have an organizational policy about email forwarding and use.				
Policies	We have a social media use policy at our organization.				
Policies Score					
Security	We are able to restrict access to certain documents using a login / password system.				
Security	All of our organization's passwords are stored in an encrypted "vault" that two people have access to.				
Security	Our online donation system uses industry standard SSL security protocol to store all donor information.				
Security	We do not store any credit card information (other than the last four digits of the card and the expiration date) electronically in our organization.				
Security	We never send credit card information via email.				

Security	When someone (staff or volunteer) leaves our organization, we follow a protocol for removing their access to files and systems.				
Security Score					
Telecomm	We have an adequate phone system with a good voicemail system.				
Telecomm	We have a conference calling line or service.				
Telecomm	We are enabled to do video chat or Skype from our office.				
Telecomm Score					
Training	Everyone in our development department is comfortable using MS Office or comparable applications (MS Word, MS Excel, etc.)				
Training	We have at least two people in our office who are "power users" in spreadsheet applications.				
Training	There are at least two people in our organization who know how to create and send email campaigns.				
Training	When someone (staff or volunteer) joins our organization, we follow a protocol to orient and train them on our tech tools.				
Training	When we have problems with our technology tools or systems, we know who to call for support (either an internal IT support or external company).				

(continues)

Category	Indicator	No	Somewhat	Yes	I don‘t know
Training	Everyone who has access to our donor database has been trained in how to use it.				
Training Score					
Website	We have an attractive, up-to-date, easy to use and easy to update website.				
Website	Our website rarely, if ever, crashes, and it can handle large volumes of traffic without slowing down.				
Website	Our organization can accept online donations.				
Website Score					
TOTAL TECH READINESS					

Tips for Working Smart and Surviving Stress

As a campaign heats up and stress builds, it is worth spending some time thinking about ways to keep yourself healthy physically and mentally.

Just looking at the lengthy lists and tests for campaign readiness may be enough to give you a headache, and this is just the beginning. In times of heightened tension, working smart becomes vital.

Get Organized

Take a look around your office. Is it set up for efficiency? Are your files within easy reach? Can you close the door and have a quiet place to concentrate? Do you have space that can be cleared and dedicated to the campaign?

How about contact information: have you entered the names, email addresses, and phone numbers of your campaign's leadership into your cell phone? Spending a single day now on reorganizing and rearranging to make your life easier and more efficient will pay off in many hours saved during the campaign.

Practice Immediacy

Most of us procrastinate, and at times spend more time delaying than doing. Capital campaigns require staff to carry out many small tasks every day—

emailing, making phone calls, writing notes, following up with staff members, drafting agendas, preparing proposals … and responding to more email. Some of these tasks are tedious, some are complex, and others may make you anxious—ample reasons to start procrastinating.

But if you use the campaign to practice the art of doing things immediately, you'll increase your efficiency, reduce anxiety, and create a clear sense of forward momentum. You'll also have better help, because when you and your staff act and respond quickly, your volunteers will be more effective. Get in an action-oriented frame of mind and your attitude will inspire everyone else.

Do What's Important

As campaign pressures mount, you've got to work strategically and spend your time where it's most needed. For example, some volunteers and donors require extra time and attention; others are perfectly happy with an occasional email or phone call. Be sure to differentiate between them to use your time wisely.

Although every aspect of a capital campaign is important, lead gifts and lead gift donors are the most important. If you can't get everything done, do this part well. When you succeed with the top gifts to your campaign, other aspects will follow.

Ask Others to Help

Don't forget the double value of asking for help. Asking for help doesn't just get the work done—it broadens ownership of the campaign and gives other people an opportunity to be part of its success.

Ten Tips to Survive Your Capital Campaign

1. **Find a confidant:** Every person who works on a capital campaign needs someone they confide in—someone who isn't part of the organization. When a volunteer calls in sick for the 10th time or a lead donor is unpleasant, you need someone you trust to be an outlet and sounding board for fears, frustrations, and anxieties that, if left to stew, will no doubt negatively affect the campaign.
2. **Pamper yourself:** Counter your capital-campaign stress by treating yourself, often, to the special things you like. Take a yoga class, find a massage therapist, get a facial, go for walks, meditate, or do whatever works best for you.
3. **Celebrate every success:** Do something to celebrate every success. That may be ringing a bell in the development office, sparking a round of applause; or having a nice lunch somewhere special when a big gift comes in. Try to notice success more often than you notice failure.
4. **Build team spirit:** Team spirit doesn't just happen; you must build it. Find ways to listen to and support every member of the team. Remember their birthdays, celebrate their successes, share the leadership with them, and

encourage them to be creative risk takers. A solid team spirit will make the entire campaign more fun and effective.

5. **Lighten up:** Capital campaigns feel like serious business, but even the most serious campaigns have their lighter moments. Make an effort to see the humor in the crazy and unexpected things that happen.
6. **Juggle your schedule:** Sometimes it pays to take time off during the week and work on weekends, or change your work hours around. If it works for you, do it.
7. **Share stories:** Make time for people in the office to share their most recent campaign experience or story. Telling stories creates bonds among people, helps them see the humor in their situations, and humanizes the campaign.
8. **Listen to your intuition:** Most of us have inner voices. If yours repeatedly nags you about something, chances are you should pay attention to what it's telling you.
9. **Make time for self-care:** Healthy food, regular exercise, sufficient sleep—these basics of self care are sometimes the first things to go out the window when time is tight. Make it a priority to take care of yourself. Remember, a capital campaign lasts for years—that's much too long to neglect yourself!
10. **Don't look back:** If you start second-guessing why this or that thing didn't happen exactly the way you wanted it to, you'll drive yourself crazy. Remember, things will go wrong, and too much second-guessing may lead to blaming yourself or others. Instead of going down that dark path, involve others in figuring out what the lessons were and how to make the next day more successful.

This list is available on my website, capitalcampaignmasters.com/strategies. Print it out and leave room to write in additional survival strategies as they occur to you.

If you've never been part of a capital campaign, it's normal to feel nervous. It can be scary to interact with board members and community leaders, not to mention asking for large gifts. Both the expectations and the risks are high.

But, so are the rewards—and the chances to learn and grow. The real power of fundraising is more apparent during a capital campaign than with any other type of fundraising. By working on a successful campaign, you'll expand your contacts in the profession and in the community. You'll become much more comfortable with every aspect of major gift fundraising—and with these new skills, you may just pave the way a new (or renewed) career.

Although it's best to be truly ready at every level before starting a capital campaign, your campaign process itself may spur your organization to recognize weak areas and make Herculean efforts to improve. Before a capital campaign, in fact, many smaller organizations never even ask themselves the questions outlined in this chapter. And even though playing catch-up while planning and implementing a campaign makes the process harder and more stressful, the truth is that many organizations do just that.

But I strongly suggest that you look carefully at your development systems as you get ready for your campaign. Then, you can incorporate the necessary investments in staff and systems you will need into your campaign objectives.

Once you've identified your strengths, shored up some areas for improvement, and developed plans to improve your systems and structure, you'll walk into a campaign with your eyes wide open, ready to take the leap.

Additional Resources

You'll find the following resources from this chapter on my website, capitalcampaignmasters.com/strategies under Chapter 2.

- Tech Readiness Checklist
- Ten Tips to Survive Your Capital Campaign