

CATHOLIC DEVELOPMENT + QUARTERLY +

An informational DIGEST to guide development personnel in the emerging field of development.

Volume XI, Edition 2

PRE-CAMPAIGN PLANNING: ENSURING SUCCESS

Sound development programs enhance campaigns. Successful campaigns enhance ongoing development programs. The most successful campaigns are those that emerge from established development programs that regularly invite, report, thank and educate donors regarding their giving.

Over the years, we have advocated that giving is a habit and that professionally implemented development programs should have their donors in the "habit" of giving in a number of ways:

- Annual Fund.
- Special Gifts (Memorials, Gift Options, Endowment).
- Campaign Gift.
- Christmas and Year End.
- Planned Giving.

Campaigns are part of the giving process for donors. A Campaign can be defined as a "community wide endeavor to achieve an important institutional objective by means of a large gift giving process pledged over a three to five year period."

Conventional wisdom says, "Don't ask too often!" Certainly, timing is important but more important is the relationship with the donor and the greater the habit of giving, the greater the relationship and the more substantial will be future gifts.

THE BEST CAMPAIGNS

What makes for the best campaigns? Essentially, successful campaigns have the following components.

- The Campaign advances a clearly understood "institutional vision" of the future.
- The Campaign has credibility: the case emerges from a strategic, thoughtful planning process.
- Volunteer Lay Leadership has "capacity."
- The Campaign is essential (case can only be realized by a Campaign).

- Research indicates the case has appeal for financial support.

CLEARLY UNDERSTOOD INSTITUTIONAL VISION

Using the five previously stated components, let's take a look at the important aspect of a "clearly understood" institutional vision for the future. The best campaigns are campaigns that are not surprises or reactions to a crisis or emergency. A campaign should be expected by the public of your Catholic institution. In other words, the ongoing development program educates and conditions your donors to give and allows them a sense of ownership.

Communication with the institution's donor base continually drives home the message of the mission. The relationship between the people of the institution and the donor is one of inviting, giving, thanking, reporting and giving again. The relationship is really an ongoing cycle. The development program communicates what the mission of the institution is, where it is going and what resources are required.

CREDIBILITY

An effective campaign case will be well received by your constituency. The campaign should be viewed and accepted as a logical strategy toward achieving institutional goals.

The following activities and perceptions should enhance the credibility of your campaign:

- the campaign should emerge from a thoughtful, strategic process intended to advance the mission of the Catholic institution.
- accrediting processes can serve as "built in" planning mechanisms to prepare for a campaign (WASC, Middle States, North Central, pastoral planning, etc.).
- the campaign is not viewed as a quick fix or as a band aid for an emergency.
- the strategic planning process is well documented, open with communication flowing freely.
- many volunteers are recruited, cultivated and involved throughout the strategic planning process.
- volunteers have ownership in the overall plan and campaign plan and thus are well positioned to serve as Campaign Leaders.
- the plan accurately reflects the mission of the institution.
- the credibility is even stronger if the institution is coming to the end of the pledge period from a previous campaign.
- a summary version of the final strategic planning report (preliminary case statement) is forwarded to key campaign leadership and donor prospects.

Many advantages are apparent to this thoughtful process. It notifies your public that a plan is advancing and prepares them for the gift giving process. The strategic planning will also mitigate the "objection factor" from the segment of your constituency that will never support a campaign under any circumstances but uses the "lack of planning" as a smokescreen or diversion largely because they are not interested in giving. Another advantage would be the educational process

for volunteers who can eloquently speak to the need for a campaign based on their experience in the planning process.

LEADERSHIP WITH "CAPACITY"

As your Catholic institution moves forward in the Pre-Campaign process, it should be cultivating Lay Leaders who can effectively lead the Campaign when it begins. Ideally, these men and women would have participated, in some form, in the strategic planning process.

They are the kind of people that are influential and affluent. They also need to have capacity:

- capacity to be credible, represent as well as lead the community.
- capacity to influence the community.
- capacity to make major gifts and attract other major gifts.

Most campaigns are won or lost the day that the campaign leadership is selected.

The selection criteria for Campaign Leaders is listed below:

- has "capacity."
- unafraid to make calls.
- outstanding, church going Catholic.
- recommended by pastor.
- capable of pledging at least \$50,000 over five years to the campaign.
- effective recruiter and leader of others.
- has a clear, apparent connection to your institution (alumnus/alumna, parent, parishioner, grandparent, etc.).
- calendar-can control not only his or her calendar but others as well.
- other institutions would want to have the same leaders involved in their campaigns.

THE CAMPAIGN IS ESSENTIAL

Through the previous processes and assessment, it has been determined that the plans, goals and objectives in the form of the "case" (new building, expanding the endowment, renovation, tuition assistance endowment, etc.) are essential. The logical question is how can they be funded? If the answer is only through a campaign, your case for support is even stronger.

Historically, campaigns were "capital" campaigns-meaning buildings, major capital improvements and facilities. Over the last 10-15 years, however, campaigns have included significant dollars designated for endowment. Development programs are challenged to raise three kinds of dollars: operational, capital and endowment.

In essence, if the institution is to live up to its objectives, it should attract the financial resources required to achieve those objectives. No other resources exist to fund the objectives such as cash reserves, other assets, etc. Therefore the campaign becomes a logical strategy and the consensus of the community advances the need for a campaign.

RESEARCH INDICATES FINANCIAL SUPPORT

Early support for a campaign is quite important. People are interested in being part of something successful and the more documentation to evidence support the better the campaign. A professionally conducted Feasibility Study is the initial research phase of a Capital Campaign.

Feasibility Studies are exceptional in the sense that they are tremendous springboards for campaigns but also provide important background and preparation for a campaign.

The Feasibility Study will have the following objectives:

- test the case for support.
- recruit volunteer leadership.
- alert publics.
- counsel and advice from the institution's best friends.
- ownership-people support what they create; the Study can give spiritual equity and ownership.
- identify major donors.
- computation of campaign financial goal.
- donor research and prospecting.
- gift evaluation of key donors.
- anticipation of any campaign obstacles or objections.
- create a campaign strategy.

Campaigns are highly structured and should be well organized. The Feasibility Study enables your institution to condition constituents, seek their counsel and hear their objections. The Study will typically consist of a well developed questionnaire and a series of interviews.

Approximately 50 key leaders or donors within your Catholic community as well as the broader community will be identified and interviewed. Other activities may include focus groups or other consensus building exercises that will enable the process of understanding, acceptance and gift support to grow.

CHALLENGE THE DONOR

Throughout the Pre-Campaign process the message should be that this is a "special endeavor" and "challenge." In closing, consider challenging people to make the largest and most sacrificial gifts they've ever made to this or any other campaign.

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The logo for CODES, featuring the word "CODES" in a bold, green, sans-serif font with a slight 3D effect and a shadow.

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