

Transforming the Nonprofit

Major campaigns are among the most energizing and positive ways to effect change.

by Richard Tollefson



UP NEXT MONTH

The Art and Science of Campaigns



ESSENTIAL FIRST STEPS – CAMPAIGN PREPARATION

Key pre-planning tasks include:

- Developing a campaign plan and timelines;
- Initiating or advancing campaign volunteer recruitment;
- Accelerating prospect and donor development;
- Initiating leadership gift cultivation and solicitation;
- Training and coaching volunteer leadership, board members and staff;
- Finalizing staffing structure and budget;
- Developing campaign communications and events calendars;
- Ensuring the fundraising “house” is in order; and
- Establishing campaign infrastructure, to include data management, performance metrics, campaign policies and procedures and naming guidelines.



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► When Darlene Newsom, CEO of Phoenix-based UMOM, the largest shelter for homeless families in Arizona, tackled a \$25 million campaign in 2006, she — along with her board — aimed to reach more families and expand services through the creation of a new facility.

What she didn't expect were the myriad additional benefits a successful campaign could generate. “Not only were we able to expand our capacity and physical space for a child development center and healthcare clinic, but we also were able to partner with 48 different organizations as a result of that physical space,” says Newsom. Moreover, the new services and facility enabled UMOM to apply for and receive national accreditation for early care and education programs, a stamp of approval that made the nonprofit attractive to an even wider donor base.

UMOM is not alone in experiencing the transformational power of a major campaign. But oftentimes, nonprofits excited about propelling their organizations into the future overlook the campaign as a vehicle of change — whether for bricks-and-mortar, strategic growth, endowment or comprehensive needs.

“A fundraising campaign, especially during its planning and preparation stages, fosters an ideal opportunity to revisit, reassess and, ultimately, reaffirm the goals and mission of the organization,” says Gregory Leet, former vice chancellor for university advancement at University of California Irvine and now vice president of advancement at The Jackson Laboratory for Genomic Medicine in Connecticut.

Leet's \$1 billion campaign at UC Irvine in 2008 funded a transformative new school of nursing, but he says other benefits also emerged. “The campaign became a lightning rod for ongoing internal discussions about the levels of financial and emotional investment required from the campus leaders to elevate and then sustain a major gifts program.”

He says that shifting the existing fundraising model (primarily corporate and foundation grant proposals) to a more relationship-driven approach of soliciting individual major gifts, was an oftentimes uncomfortable — but profound and necessary — readjustment.

CAMPAIGN CREDIBILITY

“Marketing from our capital campaign helped us with credibility, awareness and name recognition in the community,” says Newsom. The capital campaign, she believes, also paved the way for success during a subsequent \$3.5 million operational campaign in 2014. “We already had staff in place after the capital campaign, and then were able to go back to our core campaign donors.”



That's not to say that every organization seeking change should rush into a major campaign. Leaders must do their homework and be able to answer: *Why is a campaign needed?* Beyond that, they should also:

Ask: What is the intended strategic outcome of a campaign? How will it impact the community and those served? What are the real needs of the nonprofit?

Plan: Board members and staff leadership must identify priorities from the strategic plan and champion internal assessments and external market research. “Assessments and feasibility studies tell you a lot about your capacity and readiness,” says Newsom, “and that sets the tone for the intensity of a campaign.”

Understand: Annual and unrestricted giving must remain consistent. Ask donors to sustain unrestricted giving during a campaign while also supporting a specific campaign initiative.

Assemble: The right team is crucial. “You must have board members with connections to donors,” says Newsom. Some board members will solicit, some will build and steward donor relationships, and others will act as spokespersons.

Operate: Deliberate and focused operations are key. Part of that focus, says Leet, is understanding the need for additional financial — and potentially personnel — resources during a campaign. “Failure to do this can lead to a campaign stalling out after the energy of its initial launch.”

Celebrate: At successful campaign completion, celebrate. But don't let down afterward; plan ahead and transition directly into the next strategic effort.

Major campaigns support new initiatives, but they also create cohesion. When volunteer leaders are part of the planning process and work toward a common set of goals and priorities with internal constituents, they often are empowered to spread the word about the campaign. The resulting enthusiasm and intensity can advance a nonprofit's strategic plan faster and further than during a non-campaign year.

The bottom line? “Don't obsess about just the fundraising dollars during a campaign,” says Leet. “Leverage the campaign as a productive tool to achieve other important goals, such as acquiring new donors and consistently renewing them to grow the base of support.” ■

