

FIRST THINGS FIRST: Positioning for a Successful Campaign

#1 IMAGE & CONFIDENCE

- Focus on community benefit & impact and tell that story
- Develop strategies to increase visibility and confidence in your organization
- Create meaningful opportunities to engage the community in your mission
- Develop a donor-centered communications style

#2 UNDERSTOOD & ACCEPTED CASE

- Involve board, potential volunteers and leadership donors in planning
- Articulate how the project fits into the institution's long-range plan
- Outline the project plan, time-line and a flexible financial model

#3 AN ENGAGED BOARD

- Seek people with affluence and influence, as well as diversity
- Strengthen, expand and activate your board's committees
- Engage board members in the philanthropic process
- With your board, be clear how philanthropy makes a difference

#4 WILLING & CAPABLE DONORS

- Build your database of stakeholders
- Begin prospect research/consider wealth screening
- Discover prospective donor's interests, engagement, capacity and networks
- Document findings and estimate specific donors' request amounts
- Develop donor-centered communications and cultivation strategies

#5 FUNDRAISING LEADERSHIP

- Strong CEO and CDO partnership
- Involve board, potential volunteers and leadership donors in relationship building
- Engage your Board's development committee or an ad hoc committee in studying fundraising and campaign best practices
- Stress the importance of pace-setting leadership gifts from insiders

#6 INTERNAL SYSTEMS & RESOURCES

- Strengthen your fundraising policies, processes and systems
- Clean up your database and learn to use campaign management functions
- Budget appropriately for management and support positions
- Seek out training opportunities in fundraising and campaign best practices

#7 ENVIRONMENT & TIMING

- Develop a relationship with a fundraising consultant with campaign expertise
- Summarize case for support to be tested with constituents
- Confidential interviews with prospective donors and volunteers
- Provides realistic goals, actionable feedback, engaged volunteers and donors, practical advice