



Fourteen Hot Tips for Capital Campaign Success

Forget all the formulas and rules. Here are the real keys to raising capital funds.

BY PATRICIA CAESAR

As a good student of marketing, I began preparing a recent speech by benchmarking what has been said about capital campaigns in the past several years. For the most part, it's the same old story re-written over and over again: You need a campaign plan! You need a compelling case statement! You must look to your organization for leadership!

Isn't there anything more creative, more sizzling, more down and dirty one could say about capital campaigns? Can I breathe some life into this subject?

The answer, I hope, is yes. So here it is: "Patricia Caesar's Insider Tips on Capital Campaign Success" OR "What's *Really* Important in a Capital Campaign." Here are my 14 key ingredients for a successful capital campaign:

#1

You must have FUN.

Think of your capital campaign as a three-year party. Start out with a bang, and along the way make sure you have lots of opportunities for celebrations and cheering and accolades. Fun is a key vehicle for keeping leadership, volunteers, contributors, and staff fully engaged in the process. This is often called "the momentum" of the campaign. Here are some ideas for keeping up momentum:

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- Conduct your campaign in the proper sequence. There is some magic to our method.
- Set mini goals and when you meet them, celebrate!
- Recognize your solicitors and honor them. Celebrate!
- Regularly report gifts and give donors public recognition. Celebrate!
- Honor participants regularly through events and communications, such as a campaign newsletter.
- Keep the campaign visible with your constituencies through events which attract media attention.
- Party on!

If you ask yourself, "Am I having fun?," and the answer is no, go back to the drawing board; you need help.

#2

You must have SPIN.

The spin you create around your campaign can make or break it. Creativity and strategy count these days more than ever before. As we've moved into an environment in which many organizations run capital campaigns back to back, there is capital campaign clutter out there—the sense of "oh no, not again."

In this environment, sizzle is increasingly important, especially in small, less established organizations. When you're doing your first campaign, you're participating in a magnificent smoke and mirrors act. You are getting

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CREATIVE FUNDRAISING IDEAS

Consider Selling Your Property

If your organization's property has some commercial appeal, you're in a great leveraging position. Suppose you own property near a shopping mall that wants to expand, for instance, or near an interstate with good visibility for businesses. If you sell all or part of the property, you may make enough to build elsewhere with unrestricted money left over to further your organization's mission.

Sell Solutions, Not Services

You can use your organization's expertise to earn money. Ask yourself: What problem is our organization experienced in solving? How can we market our solution to a wider audience? If you work with sick children, for example, why not market a book helping kids survive a visit to the hospital? Remember, don't sell a service, sell an answer to a problem.

Do Distasteful Chores

List household tasks that people hate to do. Examples: washing windows, shoveling snow, cleaning gutters. Create a team of young people to provide the services, and sell home owners annual distasteful-chores contracts. Approach builders about offering these services as part of the cost of a new home. For other enterprising ideas, listen to the audio series *Marketing, Money & Profit*. To order, see p. 25 or call 800-424-7367.

your constituency to see you as bigger, more deserving, more capable than they ever have before—and meanwhile you are the same organization you were yesterday! How do you do this? *Spin!* Your message, your campaign goal must be so compelling that no one can say no. To create this message, you must first find what we call in marketing your USP—your Unique Selling Proposition, your special niche. Then you must find someone to put this message in the most compelling and eloquent language possible. Find a spinmaster and pay that person to shape your unique campaign message for you. This is more important than any campaign structure or gift table you could create.

In larger organizations, you've got a more nuanced, more subtle task at hand. By this time, you believe you've used every strategy under the sun to energize your constituency into a capital campaign (for you've been in a capital campaign every year for the past 10 years), and now you are being asked to do it *again!* What to do? Step back, take a deep breath, visualize that yours is an organization at a new point in its life. In a sense, a new organization. There is something very exciting about taking this organization forward to meet the challenge of its future. Again, here comes the smoke and mirrors and the

spin. It's amazing how, with some fresh thinking, you can "fool" your savvy donors into another campaign right away.

#3

You must have **SPARKPLUGS**.

What is a sparkplug in a nonprofit organization? It's a doer, a motivator, someone with vision and energy. You know who they are: they are driven, often compulsive, and fun.

While every capital campaign should have a sparkplug or two, they're absolutely critical if yours is a small, young organization. In such an organization, you're less likely to convince the CEO of a major corporation to chair your campaign. Sparkplugs take the place of a CEO's credentials.

Sparkplugs have smarts, savvy, chutzpa, a great smile, and some money. They play the pipe and the crowds follow. Sparkplugs are what *make* the capital campaigns of most organizations in this country. So, if you can't get a CEO, don't work down the food chain in a corporation and automatically consider vice presidents. Instead, get a sparkplug. They come in all sizes and shapes. They are business women and men, ladies who lunch, real estate brokers, lawyers, entrepreneurs.

#4

You must have **MUSCLE**.

That is, you must have financial leverage. There are a few basic financial rules to the capital campaign game. To succeed, you must have:

- balance among sectors of support
- a broad base of supporters
- a group of higher level donors
- healthy prospect lists and research capacity.

#5

You must have **APOSTLES**.

Your apostles are those seriously committed individuals who are with you for the long haul. They make up a small nucleus of people for whom this campaign is a *raison d'être*. When things get tough in the middle of the campaign, you must have these people whose vision never dims and whose commitment never flags.

#6

You need a few **ANGELS**.

Your angels are the donors who love you. You can count on them to part with more money than anyone else—and to part with this money soon. How many angels you need depends on the size of your campaign and the composi-



tion of your constituency. However, a good rule is that in a small campaign—1 to 5 million dollars—you'd better have at least three special donors who will give at the top of your gift table. In a larger campaign, the number of angels you need grows, but not exponentially.

#7
You must have
WARM BODIES.

Be sure you have enough people, with the right capabilities, to help. You need staff with “people” skills, high energy, flexibility. There’s a myth that you must seek out staff with capital campaign experience, as if capital campaigns are so different from annual campaigns. They aren’t different, they’re just more fun. What is more important is your staff’s sensibility, their smarts, their style. While on the letter “S,” these attributes are most important because the capital campaign is a *socializing* game.

#8
You must have a FRIEND.

You need a “Deep Throat,” a confident, a special individual on the campaign committee with whom you can share everything. These people are critical to keeping the campaign on course. They are tuned in to the informal communications network and can pass information from it to you. Then you can relay information back to the network. Early on in developing the leadership of the campaign, determine who your special person or persons will be.

#9
You must have a
ROCKET’S RED GLARE.

In other words, you need a strategic launch. You need to go public when it’s *right* to go public. Forget about 51% of goal. Forget about any formulas you’ve been told (unless you’re from a large institution with traditional capabilities and culture and a hefty endowment). We have worked with many organizations who went public at 25% or 30% of goal

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and they have achieved success. The important thing is to make your launch powerful and memorable.

#10
You must put on your
TAP SHOES and keep tapping.

Conducting a capital campaign is like putting on a good show. You must keep a steady pace *and* have good timing. You must put on those tap shoes, and keep tapping for the duration of the campaign. In fact, the brilliance of a successful campaign can often be a matter of how you integrate good timing into the steady pace. What does steady pace mean? It means structure, consistency, and all those things needed to sustain a healthy organism, whether it is a child or a capital campaign. But you don’t want to be so structured that you are rigid. You need to have flexibility so that when an opportunity comes your way, you are ready to jump, to take advantage of it.

#11
You must have a
HEALTHY CULTURE.

Your campaign will have a culture all its own, and you can help define this culture. When a group of people work intensely toward a common goal, a certain ethos, a unique environment comes into being. This is a result of your organization’s character, the leadership of the organization and the campaign, the volunteers who become involved, and your campaign goals. The defining characteristics of this culture can be good or

bad. For example, we’ve seen the following kinds of good campaign cultures: cooperative, supportive, fun, powerful, busy, and combinations of the above.

But, we’ve also seen:

- passive-aggressive campaign cultures, in which key people are angry but try to act like everything is okay.
- hysterical cultures, in which everyone is overworked and over-tired, and you hear about it regularly.
- nasty cultures, in which time is wasted on volunteers one-upping or bad-mouthing one another.
- ridiculously confident campaign cultures, whose projections are overly optimistic because everyone expects the big money to come from someone else.

The more conscious you are about the leaders you choose, the nature of their attributes, and how they fit into the culture of your organization, the more control you will have over creating a healthy, successful campaign culture.

#12
You must
KEEP YOUR PROMISES.

If you say the campaign will end in three years, make sure it does. If you tell volunteers you will send them prospect research information next week, make sure it gets there next week. Don’t undermine all the positive experiences of the campaign with missed deadlines and failed credibility.

#13
You must be prepared for
TROUBLEMAKERS.

You must realize that at least one campaign leader will act out in crazy ways during the campaign. Along with the CEO and sparkplug credentials can come a genetic tendency toward one of the following:

- prima-donna disease. You know what this looks like: “Hand deliver that document to me *now* at home; I don’t care if it’s mid-



night.” Or, “I don’t care if the campaign stationery is on cream colored paper, my paper must be white.”

- mind-changitis. You’ve seen this before, too: “I never said I’d contact those 10 prospects (even though my assignment has appeared on every list since last spring”).
- supreme snit syndrome. It’s hard to recover from outbreaks of this disease—when, for example, a campaign volunteer takes out his anger in life on a lovely, unsuspecting fundraising professional.

When you’re choosing campaign leaders, be sure you don’t have more than your fair share of real troublemakers. Most campaigns can survive up to two of these people, but usually not more.

Also, if absolutely necessary, be ready to get rid of the troublemaker. It

takes guts to do this, but capital campaigns take lots of guts anyway. Your special friend, your confidant, will be key in helping detach this person from the campaign.

#14 You need **PATIENCE AND FAITH.**

As a consultant to many capital campaigns, I am constantly asked: When will the gifts start coming in? How do you know we’ll get enough lead gifts to succeed? How do you know that Mr. Smith will not die before making a large planned gift to the campaign? Are you sure we will reach our goal on time? Of course, as a consultant, I know the answers to these questions and am paid for my advice in this regard. I am also often paid to serve as a security blanket, a good luck charm, and a fortune teller. And if organizations want to spend their money this way—on things they can

know themselves—it’s fine with me. But if you *plan* your work, and *work* your plan, you will succeed. Have patience and faith. . . and remember. . . have lots of fun. ■

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