

Ready, Set, Now?

How to Know You're Ready for a Campaign

Every successful campaign starts with readiness.

Drawing on hundreds of campaigns, this readiness framework outlines the essential conditions we see again and again in the most successful efforts—and the teams behind them.

1 Visioning & Case for Support

IDEAS

- **Clear expression of campaign vision**—the before-and-after that a donor can picture in their head and your key fundraisers can express in a couple sentences
- **Strong sense of campaign moment**—that creates urgency, answers “why now,” and provides the impetus for someone to consider an above-and-beyond gift
- **Reasonable confidence** that donors will understand and embrace your campaign case (usually from a study)

MATERIALS

- **Campaign core messaging** in an editable format you can use to support early conversations and board engagement
- **One great donor cultivation piece** developed and designed for your donor audience, in a format and style that you will get the most mileage out of

2 Leadership

VOLUNTEERS

- Consensus and **100% buy-in** to advance and resource the campaign
- **Board readiness and willingness** to play a supportive role in campaign fundraising
- **Line of sight** to potential campaign co-chairs/key volunteers

CEO

- **100% buy-in** to advance and resource the campaign
- **Community confidence** and trust in leadership (if you're not sure, a campaign planning study is a good way to find out)
- **Willingness to play a key role** in donor engagement, in partnership with CDO (with lots of latitude for what that can look like)

3 Donor Capacity

PIPELINE & PATH TO GOAL

- **Gift table that fits your donor base**—can be top-heavy or middle-out
- Philanthropic capacity of your donor base, in total, should be **4-5X your campaign goal**
- *****Clear line of sight to the first 50% of the goal*****
- Strategy for pipeline building and engagement

4 Fundraising Capacity

STAFFING

- Plan for the **frontline major gifts portfolio capacity** in line with the gift table
- Plan for who is **managing the campaign** (this can take multiple forms)
- Prioritized assessment of **other staffing needs** over time

OPERATIONS & INFRASTRUCTURE

- **Commitment to data-informed strategy**—new best practices, leveling up beyond spreadsheets and post-its
- **Policies for gift recognition**, acceptance, and counting

We know campaign planning isn't easy. If you have questions—or just want to talk through what might be next—we're always happy to connect.

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