



# Ready, Set, Now?

## How To Know You're Ready for a Campaign



April 2, 2026

1:00 - 2:00 PM Eastern

Co-presented by Melissa Berliner  
and Andy Brommel

#AFPGlobalPartner



Complimentary  
webinar produced  
in partnership with  
AFP Global.

# Welcome!



**Melissa Berliner**

Senior Vice President



**Andy Brommel**

Senior Counsel

# What We'll Cover

*(60-minute webinar; recording will be available)*

**How campaigns unfold**—and where organizations tend to get stuck

**What “ready” really means**  
(vs. what can come later)

**The core “need-to-haves” across vision, leadership, donors, and capacity**

**How to use this framework to decide your next right step**

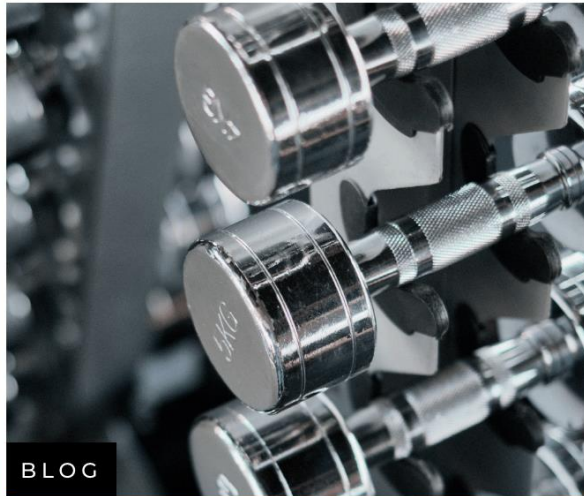
# We're always thinking about campaigns...



BLOG

## You Don't Need a Building Project to Build a Great Campaign

All sectors, Campaign Counsel, Campaign Planning  
Study, Fundraising



BLOG

## Campaigns: The Fundraising Gym

All sectors, Campaign Counsel, Campaign Planning  
Study, Fundraising



BLOG

## Your Campaign Needs a Moment

All sectors, All Service Lines, Campaign Planning  
Study, Fundraising



BLOG

## The Gifts You Can Only Ask For In A Campaign

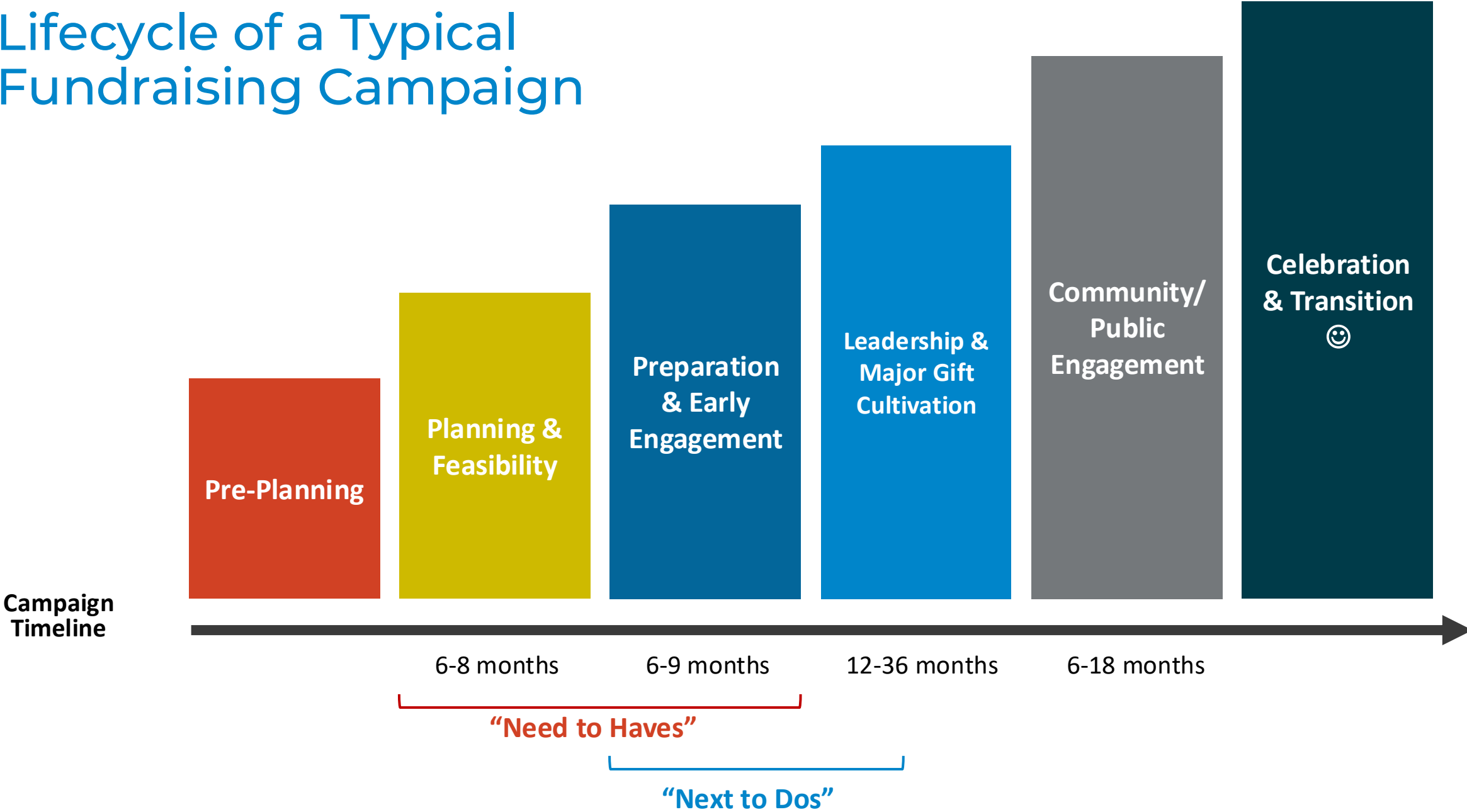
All sectors, All Service Lines, Campaign Planning  
Study, Fundraising

# Where are you in thinking about a campaign?

- Exploring feasibility
- Early planning
- Actively preparing to launch
- Already underway
- Not planning a campaign anytime soon



# Lifecycle of a Typical Fundraising Campaign



# Success Factors

## **Vision & Case for Support**

The big ideas at the heart of your campaign, the messaging you'll use to engage your donors, and the materials and resources that you'll equip your fundraising team with

## **Leadership**

Fundraising roles for executive leadership, Board, and campaign volunteer leaders to drive campaign success

## **Donor Capacity**

Your overall giving capacity, prospects, and pipeline to achieve your campaign goal

## **Fundraising Capacity**

Your team's readiness to drive a campaign, including major gift fundraising capacity, staff roles, portfolios, database practices, and operations

# What's the right level of preparation?

## Underprepared



- Pressure to “announce something”
- Confusion on message/strategy
- Momentum doesn't build
- **Launch early but don't actually finish sooner**

## Prepared



- Focused on the need-to-haves and overall strategy
- Team knows what they need to do
- **Early wins build momentum as preparation work continues**

## Overprepared



- Waiting for the right moment
- Process perfectionism
- Reluctant to invest or ask
- **Leave money on the table**

# Vision & Case for Support



## Ideas

Need to have:

- **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)

Next to do: fully detailed project plans

*“We will double the number of families we serve.”*

*“At a time when theaters around us are cutting back and shutting down, this is about ensuring that we can stay bold, stay adventurous, and keep creating the most unforgettable nights of theater for our community.”*

*“...people like us step up in moments like this to do big important things like \_\_\_\_.”*

# Vision & Case for Support

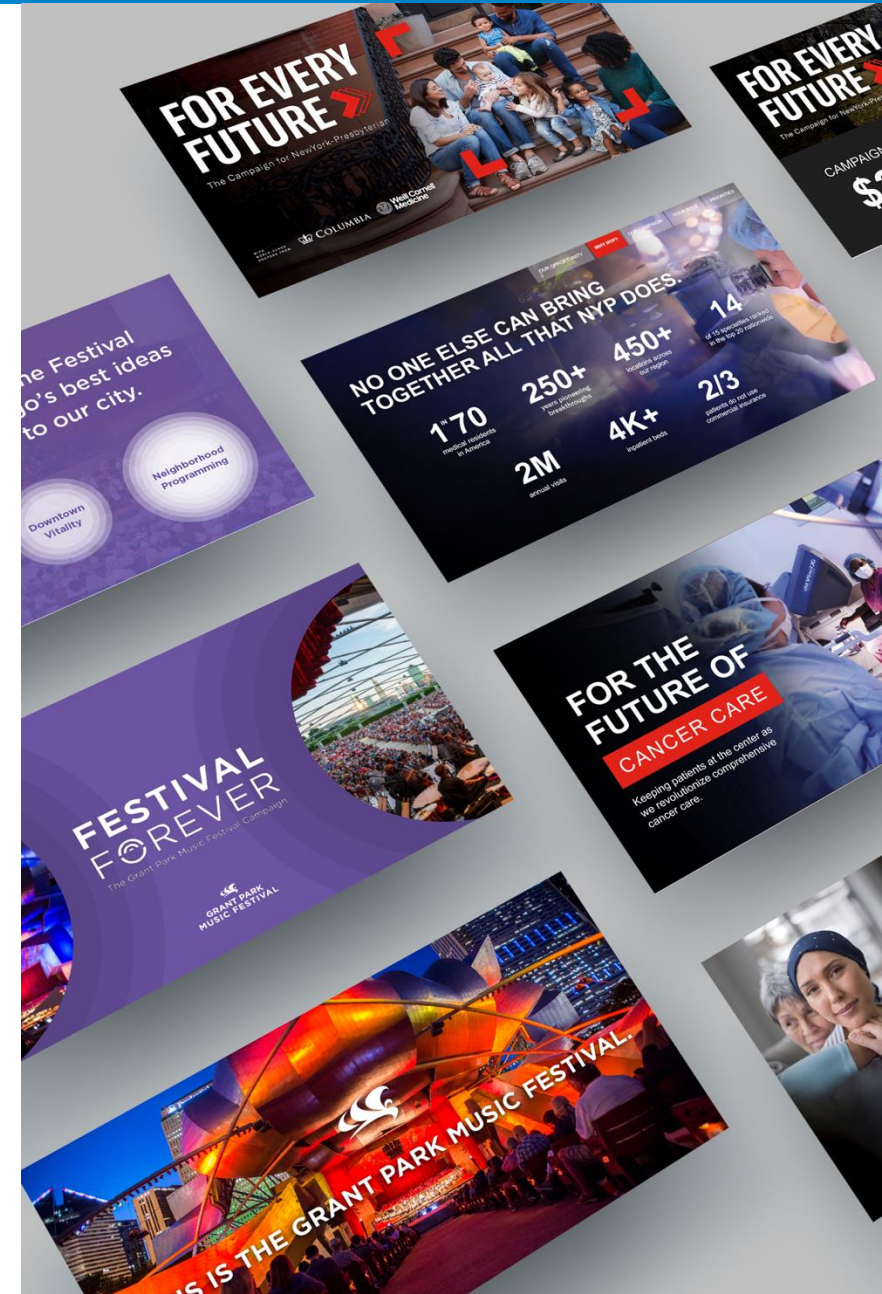
## Materials

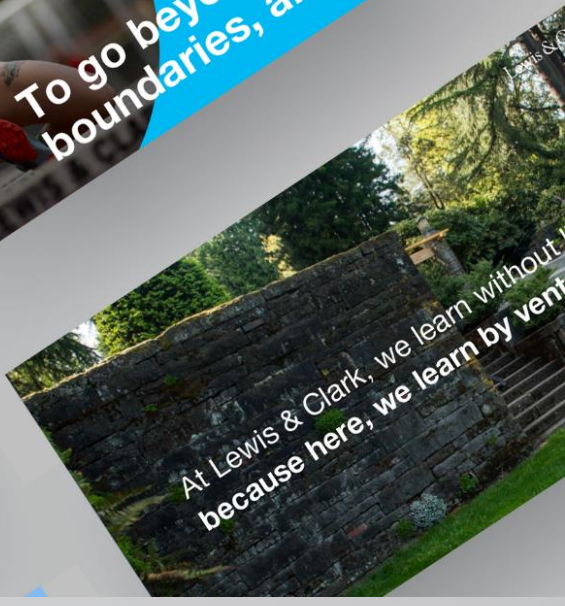
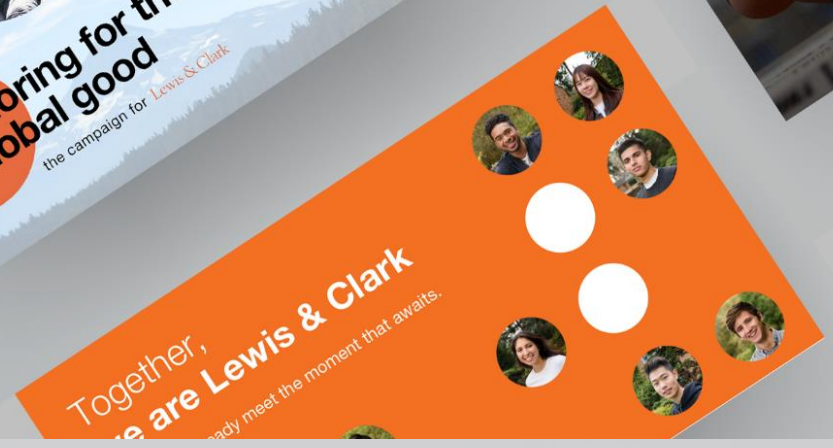
Need to have:

- **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 donor audience, in format and style that you will get the most mileage out of

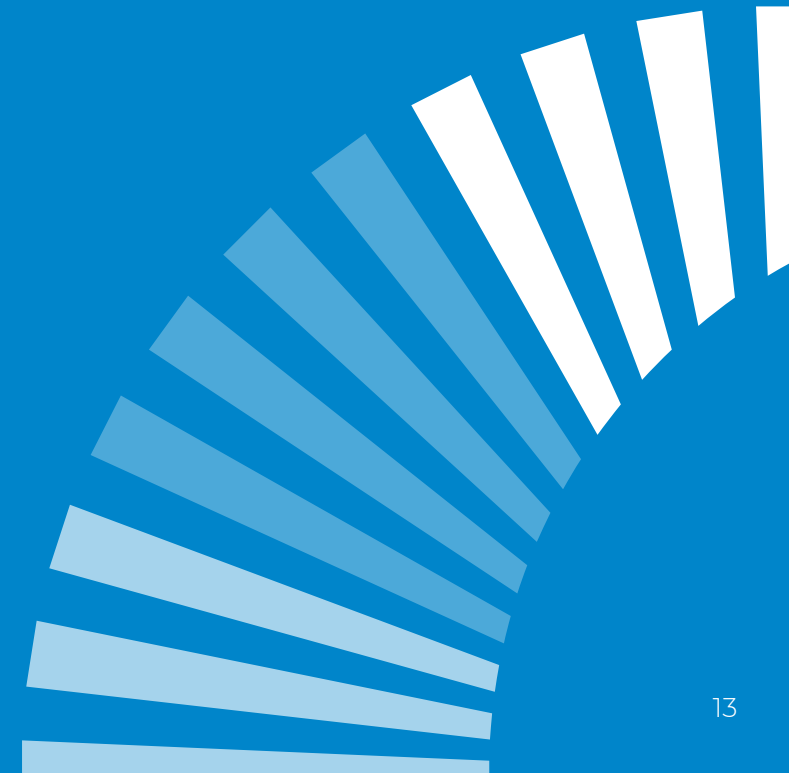
Next to do:

- **Additional collateral**
- **Talking points & FAQs**
- **Training resources**





# Leadership



## Volunteers

### Need to have:

- 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

### Next to do:

- Secure **100% Board giving** to the campaign
- Recruit and engage initial working core of **campaign committee**
- **Train and support** Board and committee for their roles

## CEO

### Need to have:

- **100% buy-in** to advance and resource the campaign
- **Community confidence** and trust in leadership (*if you're not sure, a CPS 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)

### Next to do:

- Build a **strategic portfolio** for your CEO and pathway/process to collaborate
- **Coach/train and support** your CEO for their role
- Find your CEO's **campaign voice** and **"home field"** for cultivation

# CEO Personas

## Master Solicitor



- Leans into high-stakes donor conversations
- Makes clear, values-based asks (and follow-ups)
- Moves prospects from interest → commitment

## Visionary Communicator



- Articulates the before/after vision in plain language
- Connects strategy to donor meaning (“why now”)
- Inspires confidence through clarity and consistency

## Relationship Builder



- Builds authentic relationships over time
- Opens doors through peer-to-peer influence
- Deepens engagement with warmth + credibility

# Donor Capacity



## Pipeline & Path to Goal

### Need to have:

- **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 goal\*\*\***
- Strategy for pipeline building and engagement

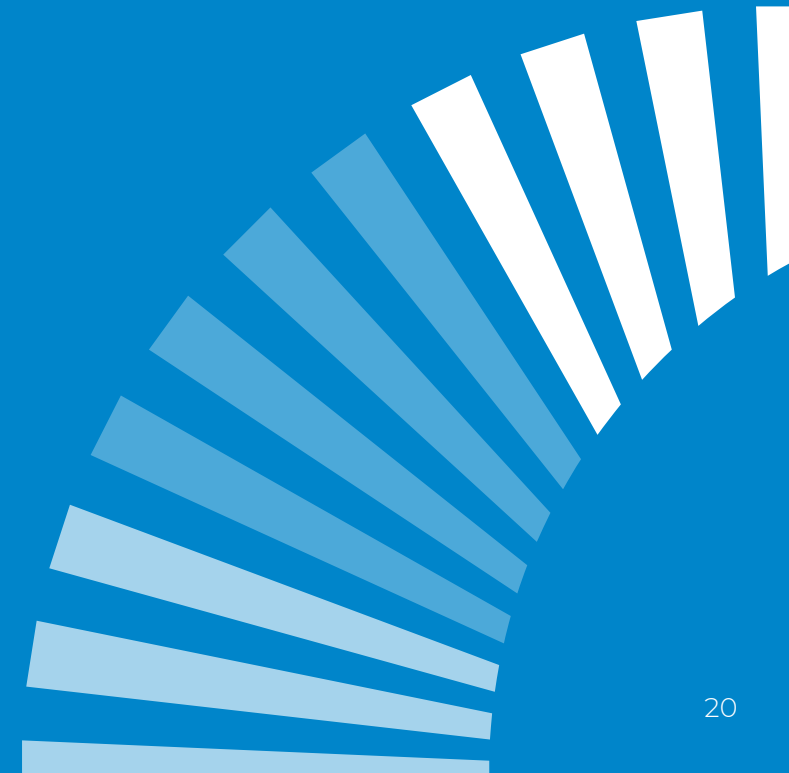
Next to do: Prospect research; Portfolio build-out and rebalancing; Engagement strategy for top X prospects

# Same Goal, Different Paths

Gift Level	Gifts	Prospects	Subtotal	Cumulative \$
\$5,000,000	1	3	\$5,000,000	\$5,000,000
\$2,000,000	4	12	\$8,000,000	\$13,000,000
\$1,000,000	5	15	\$5,000,000	\$18,000,000
\$500,000	7	21	\$3,500,000	\$21,500,000
\$250,000	14	42	\$3,500,000	\$25,000,000
<b>Total</b>	<b>31</b>	<b>93</b>		<b>\$25M</b>

Gift Level	Gifts	Prospects	Subtotal	Cumulative \$
\$2,500,000	1	3	\$2,500,000	\$2,500,000
\$1,000,000	8	24	\$8,000,000	\$10,500,000
\$500,000	12	36	\$6,000,000	\$16,500,000
\$250,000	20	60	\$5,000,000	\$21,500,000
\$100,000	35	105	\$3,500,000	\$25,000,000
<b>Total</b>	<b>76</b>	<b>228</b>		<b>\$25M</b>

# Fundraising Capacity



## Staffing

### Need to have:

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

### Next to do:

- **Refocusing and implementing new roles** for existing staff
- **Hiring additional staff** as needed
- **Training** staff for campaign roles

# Staff-Up Scenarios

## More MGOs

- 1,800 Top Prospects: \$100K+ capacity, consistent giving, many longtime/loyal
- 1,500 Top Prospects unmanaged
- **Hire additional MGOs in several stages and rebalance portfolios for campaign**

## Build The Middle

- Top Prospects can be managed with existing capacity
- 2,000 high-end annual donors have capacity for major gifts but no current management or strategy
- **Hire a campaign gift officer focused on building a mid-level strategy and qualifying prospects**

## Capacity Isn't The Issue

- 175 Top Prospects who can be managed by VP, DoD, and CEO
- Small team, need to make strategic use of time and efforts
- **Focus on strategy and prioritize efforts**
- **Possibly hire a campaign coord/mgr to help support portfolios and coordinate efforts**

## Operations & Infrastructure

### Need to have:

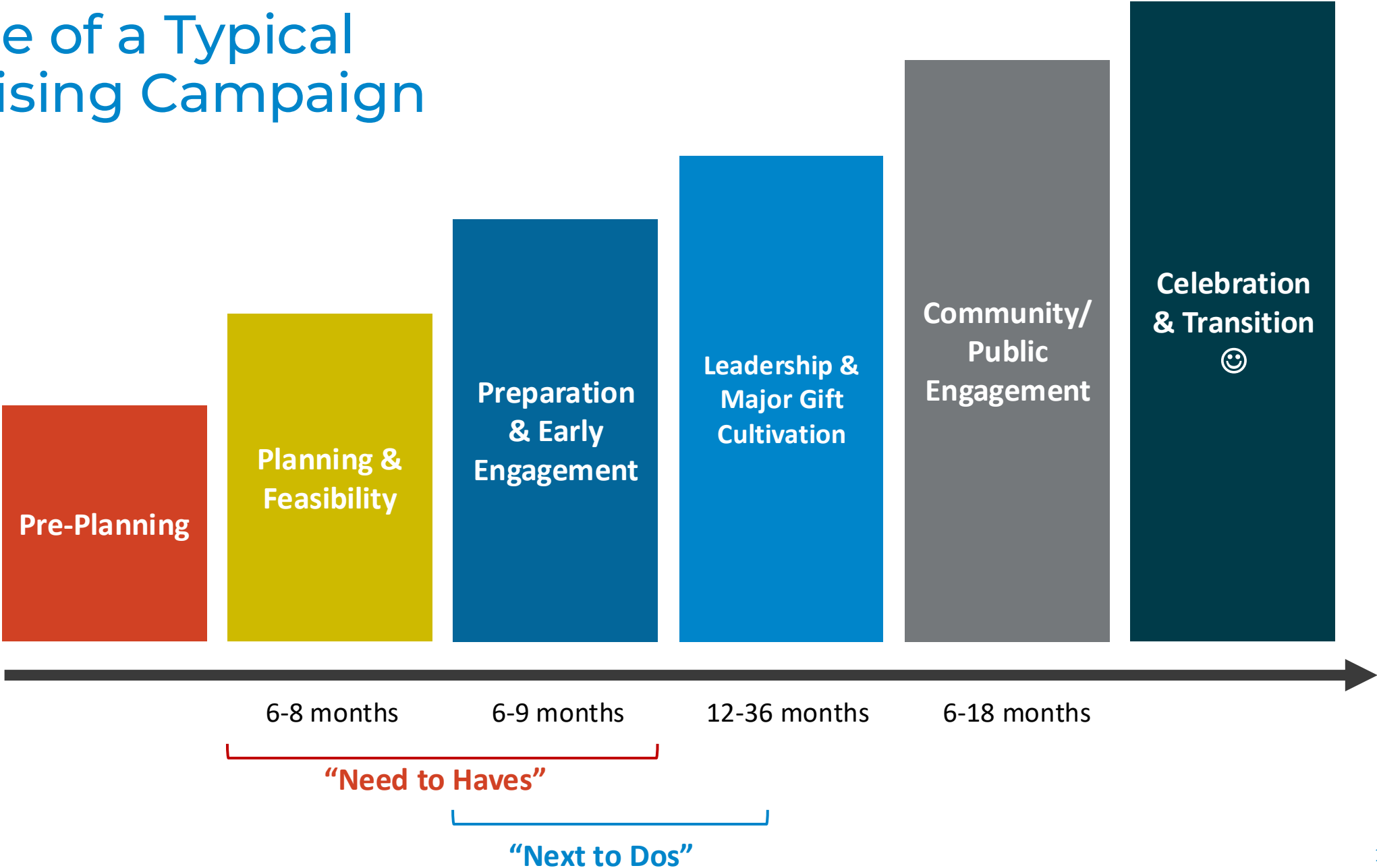
- **Commitment to data-informed strategy**—new best practices, leveling up beyond spreadsheets and post-its
- **Policies to govern campaign management**, including for gift recognition, acceptance, and counting

### Next to do:

- **Database cleanup** or migration
- **Report development**
- Building metrics and **dashboards** to monitor campaign performance and fundraising team KPIs

# Lifecycle of a Typical Fundraising Campaign

Campaign  
Timeline



How many  
need-to-haves  
do you *really*  
need to have?



# The good news:

Campaigns strengthen the entire fundraising program.

- **Campaigns build fundraising muscle**, not just revenue.
- **They force focus on what matters most:** major gifts and top prospects.
- **Campaigns unlock investment** in staff, systems, and strategy.
- **They hardwire smarter habits**—metrics, discipline, and accountability.
- **Campaigns accelerate growth** of both the program *and* the people.

# Thank you!



# Please stay in touch!



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