

# How To Make Certain You Have A Winning Fundraising Campaign

## Guidelines to Winning

**1. Not every fundraising firm, no matter how good, is right for every institution or every project.** Be careful to choose the firm which most closely meets your standards and criteria. Develop a check-list of qualities you are seeking and use the list at every presentation during the interviewing process. A grading system with weighted points will be valuable.

**2. Insist on a feasibility study.** It is one way certain to assure a valid exploration of your assets and the problem areas. If a firm offers a free study, eliminate them out-of-hand. A free study is worth about what you've paid for it.

**3. Beware of a study report which reads more like a sales document than a careful analysis of your market position.** Insist on documentation and substantiation. If the Report recommends "achievable objectives," demand to know why and how. Ask for proof, or look for another firm.

**4. Evaluate your board with excruciating candor. The buck starts there!** If your directors don't have the muscle, influence, and financial resources to mount a campaign, you have problems. You will probably have to recruit a surrogate group and that may not be easy.

**5. Top leadership is crucial.** If you can't recruit the influentials to your effort, you should postpone your program until you can win them for your cause.

**6. A campaign is won with large gifts.** No matter what your goal, the largest dozen or so gifts must represent about a third of your objective. The next 100 gifts, another third. There have been exceptions to this rule, but darn few. Don't count on it.

If the feasibility study doesn't show how these large gifts can be wooed and won to your project, and identify the sources, be wary. The odds are against you.

**7. Dare to ask.** You'll be hurt more by those who would have said "yes" but were not asked than by those who say "no."

**8. Your project must have sizzle.** People don't give to needs. They give to bold ideas and inspiring ideals. Test your case for funds carefully.

**9. Those who know you best of all, love you most of all.** Those who know your institution well are four times more likely to have a favorable opinion. If you haven't been doing a consistently good job of interpretation and cultivation, you won't be able to perform instant-magic. Remember the admonishment: "You don't make a pickle by sprinkling a little vinegar over a cucumber. You have to immerse it."

**How Can You Be Sure You're Ready?**

1. Is there wholehearted agreement among the Board of Directors and the staff concerning the worthwhileness of the cause?

2. Are the Board and Staff determined and committed to the success of the project? Are they interested enough to make personal sacrifices for the campaign — both in time and money?

3. Is your institution well regarded and highly respected in the community? Are your services considered important and relevant?

4. Is there a valid and urgent need for the funds? Is the case one which can be dramatized easily and effectively for emotional appeal?

5. Is top-level leadership available and interested in the project?

6. The largest gift — the initial one, if possible — should be for one-tenth to one-sixth of the campaign goal. Will this be possible? Can one-half of the campaign goal be secured from ten to fifteen donors, can sixty-five to seventy-five percent of the goal be secured from approximately one hundred donors?

7. Can a sufficient corps of enthusiastic and dedicated volunteers be enlisted and trained to work on the project?

8. Is the timing and planning of the campaign sound?

9. Once the building project has been completed, are there resources available to provide the annual support which will be necessary?

**JEROLD PANAS, LINZY & PARTNERS INC**  
Consultants to Philanthropy  
500 North Michigan Avenue, Chicago, Illinois 60611 • 312-222-1212 • 800-254-7777

*In fundraising, pre-campaign preparation is not only important—it is everything. Your program will be won or lost months before the opening kick-off. We have prepared a piece called Nine Vital Questions which will determine your readiness and help assure the success of your effort. Write or phone for 35 copies of this monograph, How To Make Certain You Have a Winning Fundraising Campaign.*

**10. The cheapest is not necessarily the least expensive.** Fundraising is bottom line focused. The emphasis must be on how much you raise, not how much you spend. The difference between the two is what really counts.

**11. Pin down time commitments.** The officer of the firm you prefer may have made a dazzling presentation. We have made a few in our time! But if you choose the firm because of the person who made the presentation, make certain you understand precisely how much time he will devote to your project. Before you sign a contract, be sure the commitment is specifically outlined.

**12. Insist on detailed progress reports on a regular basis.** Have strategy

meetings on at least a weekly basis to monitor progress. If the campaign is not meeting its action-calendar and game plan, find out why. Heed the warning signals. A problem campaign can almost always be detected early. Don't wait until it's too late. Be quick to call in the firm's officer and supervisor. Ask some hard questions and demand action.

**13. Be Bold. Resist the usual, conventional and commonplace.** Raising funds in today's world requires strategic and imaginative planning. There are some campaigns where the old rules and standards still apply, but these situations are few and far between. Seek a firm which is flexible enough to adapt its greatest talents and human energies to your unique situation.

In the past ten years, JPL&P has served over 1200 client-institutions. We've learned a lot. There's a small percentage of our work that has generated absolutely block-busting campaigns. As exciting and explosive as any firm in the business. We've had some that have raised more than twice their goal. These are the campaigns we like most to talk about. Fundraisers are like that!

And let's face it: a small percentage of our programs were...well, they were bad. That's the truth of it.

The great majority of our campaigns are somewhere in between. Mostly better than good.

There are few really exceptional firms in the business. We are proud that most of our past clients would place us in that elite group. We've worked darn hard to merit that recognition.

In the course of these years, we have learned a lot about managing a successful campaign. There are no guarantees. That's unfortunately true. But there are some verities which provide inviolate bench-marks to winning. You'll find that few of these are new to you. But you will be interested in reading what we have learned. Perhaps a careful review will help assure the success of your next fundraising program. Write or phone us if you would like copies of this monograph to distribute to your Board. JP



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