Campaign Success 101: Leadership Recruitment and Development

By Avrum Lapin

The dedication of board members and campaign leaders is often the primary indicator of success for any fundraising campaign, or indeed any major fundraising initiative. Committed, dedicated, capable, and influential leaders guide the direction of an effort. These lay leaders provide essential and visible support for campaign goals and enable the initiative to penetrate the philanthropic community. While all members of a board and a campaign leadership team must have financial "skin in the game," they also provide endorsement and credibility in the form of their names, profiles, and their connections, as well as their investment of time and energy.

A campaign leadership team is expected to support a campaign or fundraising project in many ways. Every individual recruited to be a part of a leadership team is expected to commit time and financial resources and be willing to ask others to join them in supporting the organization and its vision. This team will be "on point" for asking, as well as expanding networks and creating connections. In addition, leaders may be asked to host and attend cultivation events and, of course, be present at regular committee meetings.

It is critical that a leadership team be assembled and trained in a thoughtful manner. Throwing together a team of random individuals because it is a "best practice" or someone told you that it is necessary, might lead to the project going off track, or worse. There are several steps to creating and developing a strong, focused and determined leadership team. If done correctly, those leaders will serve the organization on the short term, and well beyond the timeframe of the campaign.

Identification and Research

When creating a leadership team for any project, the first task is to develop as list of possible members. Leadership teams range from 4-6 members for smaller organizations or projects to 15-20 for larger endeavors. Identifying and researching prospective leaders is a critical first step. Not only is the careful selection of prospective leaders important, because each member brings individuals value, it is also necessary to consider how these individuals will function together. By understanding each committee member's background and interests, it will be easier to assemble the different skill sets and connections that are necessary.

This list should be built from input from professional and volunteer leaders and board members, and others from among the organization's thought and opinion leaders. Working collectively will not only produce a wide breadth and variety of prospects, it will also help to gather a broader sense of each person's potential contribution – financial and otherwise. These names can come from among leaders and donors to your nonprofit and others, volunteer lists, or current and past board members. It might even be useful to look at the types of prospects that are desirable for a campaign and then figuring who has connections to and will penetrate various stakeholder communities, to individual major donors, institutional donors and funders, and corporations that might prove useful. The team should be a mix of those who can contribute at a major level and those, while giving more modestly, will commit to "giving and getting" and asking actively and effectively.

And when it comes to giving – everyone at their own place, 100% is crucial, there can be no exceptions. Once someone is brought on because they bring "other things to the table," the expectations are compromised and the game may be lost.

Things to consider when building the list:

- Past giving history
- Professional and personal skills
- Volunteer experience
- Available resources, in terms of both time and financial support
- Business connections
- Family and other community connections

An essential member of the leadership committee is a campaign chair. This person is the outward face of the campaign and will lead the team in their interaction with major donors and prospects. This person must be of a solid reputation in the community and have the financial capacity to make a major gift – not the lead gift necessarily, but notable.

They need to be able and prepared to clearly articulate the vision and mission of the organization and the "selling proposition" for the campaign, and where they all intersect. A growing trend is to have co-chairs who will divide the work, making the job more achievable. Some campaigns also have honorary chairs who lend their name and (hopefully) make a major gift, but may not offer their time or energy. Honorary chairs can be valuable to elevate the cause and spread the word, but beware of too many honorary positions… every campaign succeeds because of dedicated workers that can get the job done.

Recruitment

Once the leadership prospect list is determined, recruiting is the next stage in the process. It is common for a board chair or president to also serve on the leadership team – though the campaign leadership is a terrific place to attract key philanthropists who have shied away from board service. People are most likely to respond to their peers when asked to take on an important and visible role – and most certainly when it comes to giving. It is also best to ask people to join the team in a comfortable and private setting such as their home or office.

Potential leaders should be involved in the campaign process from the beginning. Inviting leaders to develop the needs and goals of the organization, as expressed through the campaign, will result in deeper commitment and support.

Recruitment should be handled with care, and with clear and consistent expectations that are determined before recruitment begins. Further, a campaign plan should include an organizational chart showing all of the various positions that are needed and even how many people will fill each role.

Too often volunteers on the fence are told that they "don't have to worry about their own donation," or "that the time commitment is not that much" to entice them to joining the team. This soft approach, and the dangerous "exceptions" noted above, leads to confusion and resentment down the line when the reality of the position becomes clear. It is best to have clear role descriptions and timelines for the process decided before recruitment begins.

Sometimes people say no, and that is to be expected. Sometimes leaders are asked and initially say no, but after speaking with others on the team or staff, they may change their minds. It helps to get the support of spouses or partners when the ask for leadership is made. This ensures that they are ready to take on this role. It is also obviously a good idea to have a back up list to fill the leadership team in the event that some of the potential team members refuse the position.

Education

Leadership Training is an essential part of the process. Many people, regardless of what they do successfully for a living, are highly uncomfortable asking others for money. The single way to gain confidence in asking for support is to practice, and to understand that nobody should go alone.

Training and role playing with experienced staff members, board members or professional consultants is the surest path to success. In addition, it is often best to start with "easy asks," and the committed core of the organization, knowing that these meetings will (hopefully) be less stressful. Through practice, members of the leadership team can get feedback and learn how to adjust their pitch for the next meeting.

There are many skills that training can bring to the leadership team. This training can include ideas for how to write an introduction, how to structure an ask and how best to follow up.

Though some team members may have asked for money before, each nonprofit and every campaign has its own personality and vision and each organization its own culture and mission. Leadership training will ensure that everyone on the team is familiar with the specifics of the campaign and the details of the case for support. In order to be an effective ambassador, leaders should speak the same language and work towards the same goals.

Engagement

Setting up a leadership team is not "a box to check off of a list," but rather the determinant of success and an ongoing process. New members will be added to the leadership team, while others may drop off. Feedback from the group will improve skills and make for better future asks. Regular progress meetings ensure that goals are being met and that all campaign leaders are clear on the next steps and assignments. The leadership team needs to be active participants in the process, not just names on the event invitations or campaign brochures.

Showing gratitude to campaign leaders on a regular basis also keeps leaders active. By expressing appreciation publicly in the community in front of peers, friends, and family, leaders are more likely to stay involved and focused on their efforts.

Successful campaigns depend on strong leadership, enabling an organization to harness the energy, establish pace and presence, and thus influence of its members. Working together with staff and other professionals, campaign leaders have real impact on the direction of a campaign and its capacity to achieve results. Well-trained and engaged leaders influence and strengthen the nonprofit beyond the scope of the campaign and have a lasting effect on the organization.

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