# When the Party's Over:

## Why, How, and When to Conduct a Post-Campaign Assessment

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# Conduct a Post-Campaign Assessment

By Gary J. Hubbell

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# Introduction

You probably fall into one of three camps: (1) you're planning a fundraising campaign, (2) you're in a campaign right now, or (3) you just finished a campaign. Doubtless you can find a myriad of resources on planning and conducting campaigns. Surprisingly, there are few on what to do following a campaign. How surprised should we be, then, that new campaigns often look like the previous campaign and like the neighboring nonprofit's campaign? If we don't take the time and make the investment to understand the collective accomplishments of these multi-year efforts, how can we expect process improvements?

Raised on a steady diet of public relations planning and opinion research,[1] I've long been fascinated with learning how individuals and organizations think—and how they *behave* as a result of how they think. Because campaigns are sustained, collective undertakings, it seems important to do some sort of summative evaluation. Drawing on my early influences, a post-campaign assessment seems like a "no brainer," especially

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[1] Many of my formative professional influences stem from my dad. In 1965, he formed Ned S. Hubbell & Associates, the nation's first public relations agency specializing in educational public relations and opinion research. A pioneer in his field, my father conducted opinion surveys in 150 school districts across the nation. He retired from his own agency in 1981 and became the director of project outreach for the Michigan Department of Education. In that role, he conducted 350 opinion surveys in Michigan school districts during a ten-year period.

related to examining the campaign's success in achieving its stated objectives, the strength of the case for support, the degree to which donors internalized key campaign messages, and the implications for future campaign planning.

My objective here is to convey the importance of doing a post-campaign assessment and to outline the steps for implementation.

# Chapter 1:

# It's Over! Why Bother?

Most organizational processes begin with some form of research and end with evaluation. Public relations professionals learn the "RACE" formula: **R**esearch, **A**ction planning,[2] **C**ommunication (or Implementation), and **E**valuation. Organizational development strategists like Peter Senge encourage us to "begin with the end in mind." Both approaches resonate with the "ROPES" process that drives the execution of many organizational philanthropy programs: **R**esearch, **O**bjectives, **P**rogramming, **E**valuation, and **S**tewardship.[3]

Yet, despite how seemingly widespread these formulae and theories are in philanthropic circles, I witness precious little attention to the post-campaign assessment

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[2] There are several accepted variations of this formula. Many practitioners substitute "Analysis" for "Action planning." Others (among them, Cutlip and Center) refer to Research-Listening, Planning-Decision Making, Communication, and Evaluation.

[3] In *Effective Fund-Raising Management* (1998), Kathleen Kelly presents ROPES as a comprehensive theory for integrated relationship management, where she cites evaluation of effectiveness and efficiency as well as evaluation by objectives (pp. 427-432).

as part of program evaluation. I see so much activity on the front end of campaigns, but not much on the back end. Perhaps we've been lazy—or just plain exhausted!—when it comes to the evaluation phase. Most of the discussion and literature about what transpires after a campaign is focused only on recognition, communication, and ongoing fundraising. While important, these alone do not help grow the philanthropy effort. Reflection and analysis are necessary as well.

### Table 1: Three Phases of Fundraising Campaigns

| Phase I:<br>Pre-Campaign | Phase II:<br>Implementation | Phase III:<br>Post-Campaign |
|---|---|---|
| Planning<br>Staffing<br>Case development<br>Prospect positioning<br>Awareness building | Cultivation<br>Solicitation<br>Communication<br>Recognition | Communication<br>Recognition<br>Ongoing fundraising<br>Reflection & analysis |

For most development professionals, phase one activity is filled with optimism, promise, and discovery. The second phase is hard work, but it's also the fun part: cultivation, solicitation, campaign implementation, and recognition. However, the post-campaign work, which should be the evaluation side, often defaults to simple cleanup. When the campaign is over (hopefully successfully), many professionals just want to call it a day. After all, today's campaigns are taking longer and longer. We recognize how difficult it has become to keep people's attention on the campaign for so long. When the campaign is over, a customary response is to simply let everyone rest.

This is perfectly understandable, but I suggest that if your organization is truly focused on being a best-practice organization, you also need to be a learning organization. It is

important to reflect on what you learned as a result of what you have just been through during the campaign. In almost every case, the learning is monumental. The energy that the organization—not just the development office, but the whole organization—expends to sustain that focus on a campaign is *huge*. If you take time to rest without first taking time to reflect, you will miss some great learning opportunities.

## BENEFITS OF A POST-CAMPAIGN ASSESSMENT

### 1. Identify missed (or hidden) opportunities.

In doing this kind of reflection, you may be able to identify some missed or hidden opportunities. For example, after comparing the data, you may find there are some donors whose gifts came in well below capacity. During the campaign, that was an "aw shucks" moment, but then you had to move on to the next donor, and you forgot to go back. The analysis done as part of the post-campaign assessment can provide a helpful reminder to return to the gifts below capacity to explore whether additional gifts are possible now that more attention can be paid to these important donors.

Another example of where analysis can help on the heels of a campaign comes from examining the geographic distribution of gifts to your campaign, especially if you're in a large service area. It is easy to become focused on only two objectives during a campaign: (1) raising the aggregate dollar amount, and (2) fully funding each of the program elements that make up the campaign. With that very important but narrow focus, you may be missing some equally important signs that can help you design strategies for future success.

Upon analysis, you may find that certain geographic pockets turned out to be very fertile during the campaign, but you were not conscious of it at the time. Taking the

time for post-campaign data analysis and reviewing the geographic comparison may help you focus your efforts. With this newfound awareness, you may deem it appropriate to direct the attention of development staff to these targeted areas.

*2. Understand how the campaign impacted your philanthropy program's capacity.*
Another advantage to conducting a post-campaign assessment is that it helps you understand your program's capacity. Big campaigns are occasionally followed by smaller special projects, but we are most often called upon to raise even more money than the time before. Therefore, you need to leverage your learnings from the last campaign in order to meet organizational expectations and, presumably, greater constituent needs. Conducting a post-campaign assessment allows you to gauge whether the previous campaign actually grew your capacity for philanthropy.

Growth in capacity can be found among your donor base, as indicated by the number of new donors—in total and in certain gift tiers. Growth can also be found in existing donors who significantly upgraded their giving during the campaign. In addition, the discipline and concentration necessary in a successful campaign may have demonstrated process improvements and efficiencies in reporting, moves management systems, development communications and marketing, and staff training and mentoring. Program capacity may have increased through the growing sophistication and experience of your development allies—internal organizational leaders and board members, each of whom may now have greater appreciation and comfort with the activities of the development spectrum. These and others are illustrations of program growth that can elevate your platform for success, but only if you are intentional about the kind of comparative analysis produced through this assessment.

Finally, you may want to use this assessment as a means of gauging the degree of integration among your development programs: annual giving, special events, major and planned giving, corporate/foundation giving, and public support. Silos spring up insidiously and are tough to deal with during campaigns. The summative assessment after the campaign could be the time to identify the need to remove barriers in order to encourage donor movement through the giving-commitment continuum.

### 3. Enhance and deepen your culture of philanthropy.

What effect did the campaign have on the culture of philanthropy? This is incredibly important, because development professionals are often in the vanguard. Because of our external roles, we are at the forefront in our organizations, creating valuable opportunities for learning. This is our moment. Increasingly, development professionals have learned to speak the language of finance, marketing, and program development, thereby earning a seat at the table and becoming a force for organizational learning. We can help organizational leaders understand the value of philanthropy even more deeply so it can become something that is institutionally integrated as opposed to something that we occasionally acknowledge in materials, administrative speeches, or board development workshops. We want to be intentional about driving the learnings deep into the culture of the organization.

### 4. Understand the hearts and minds of donors—your partners in the campaign.

Research is vitally important in understanding the hearts, minds and giving behaviors of donors. The post-campaign assessment should include some element of attitudinal research that informs you about donor perceptions and motivations *as a result* of the campaign. We'll discuss different research methods shortly. Here, I simply wish to make the point that post-campaign research adds a depth of understanding about what donors think, feel, and do as a result of your concentrated campaign efforts.

### *5. Create the framework for planning the next phase of growth.*

I see the work of philanthropy in a continuum, as opposed to something that is episodic. Generally speaking, we are all beginning to think that way in development circles. We used to think of raising big money as something that you do through periodic campaigns every 10 or 15 years. Today, major gift fundraising is done on a continual basis, so we are almost always in campaign, whether or not we call it by that name.

Planning is fueled by evaluation. When I conduct feasibility studies, I can usually predict what we will learn while I am doing the front-end discovery work with a client. Often, we will find that we have not really thought through our fundraising strategy nor found the most effective ways to communicate organizational plans. If that is the case, we need to pause before we move into the campaign. However, if you do a thorough analysis at the conclusion of a campaign, very often you are front-loading many of those observations. Therefore, your need for a feasibility study for the next campaign may be lessened or at least different. In doing this, you are adding one more logical business tool into your cycle, which is extremely helpful when you are doing this kind of ongoing fundraising work.

# Chapter 2:

# Assessment Components

A comprehensive post-campaign assessment is made up of four elements:

1. An internal operations review
2. Comparative data analysis
3. Personal interviews
4. Survey research

The following section outlines these methodologies and defines the conditions under which you might consider each one. These methodologies can be mixed and matched, depending on your specific needs. It is not necessary to do all of them. Before choosing the methodologies to be used in a post-campaign analysis, you must first ask yourself, "What is it that we are trying to learn, and how will knowing that strengthen our program?" Once you have established your objectives, you can build the research methodology around them.

For example, you may find the following objectives relevant in your situation:

- Did the campaign grow our donor base?

- What donor stewardship demands can we predict now that the campaign is over?

- What evidence can we find that signals the campaign's impact on our internal culture of philanthropy?

- How do our donors feel about us now?

- How can we demonstrate the campaign's success beyond comparing actual funds raised to dollar goals?

- What impact will the campaign have on near-term fundraising potential?

- How did the campaign enhance the talent of development staff, and what must be done to retain the best and the brightest?

## INTERNAL OPERATIONS REVIEW

If you wish to assess whether or not your house is in order after completion of the previous campaign, an internal operations review will help you. As a result of an almost singular focus on major donors during campaigns, we often pay scant attention to maintaining policies, cleaning the donor base, nurturing the board, and a host of other things.

In a post-campaign assessment, you should use the pre-campaign development audit (if you did one) as your starting point. From an operations standpoint, try to mirror that audit so you have a point of comparison: a snapshot before the campaign, and a snapshot after. Note that I am not talking about a feasibility study here. Rather, I am referring to a consultant-led audit to determine whether an organization is fully prepared and adequately resourced before beginning a campaign. Every campaign requires a dedicated focus, so it is important to verify that the organization has the infrastructure and the processes in place to handle the weight of such a huge

undertaking. As a result, pre-campaign audits are commonplace, enabling you to "jump start" your post-campaign operations review.

The internal operations review might include the following:

- End-of-campaign status
    - o Were any identified prospects unsolicited?
    - o Were there any donors/prospects who said, "Come back later"? Perhaps these donors are in the position to give a deferred gift. It is important to document these donors for future reference.
    - o Were all program goals achieved? If not, what is the status and what can be reported to donors?
- Institutional issues
    - o What is the position of the organization as a result of the campaign? (You may think about this as comparative market position and/or the organization's capacity to deliver on its mission.)
    - o Are there any recent opinion/perception studies conducted by other departments that could help the development department assess the campaign?
- Board infrastructure, activity, and relationships
- Program integration
    - o Are our development programs seamless in moving donors through the giving-commitment continuum? What barriers were discovered during the campaign?
- Staffing and organization
    - o Inventory the development staff. We are in a relationship-driven business. When there is staff transition, it is a huge hiccup to our success in fundraising.

- o Succession planning for staff in allied departments (e.g., marketing, PR) administration, and/or the board(s).
- Programs, policies, and operating procedures
- Database, systems, and technology
- Community relations/marketing
- Budget

The value of the internal operations review is that it gives you the opportunity to do a comprehensive assessment of the state of the development department or foundation at that particular moment, which you otherwise seldom have the time and energy to do. It gives you a context for the philanthropy program beyond the simple metric of dollars raised.

Be forewarned—you should prepare to expend real effort. This is a hard discussion, but it is also a very fruitful one. You will come away with a nice blend of leading and lagging indicators, all of which should help point to the growing maturity of your program.

How long might this take to accomplish? I suggest approximately 60 days, whether you do it yourself or bring in outside counsel. Even if you choose to outsource this task, your staff will still be responsible for organizing and providing information, which will have an impact on their time.

## Comparative Data Analysis

If your primary interest is determining the campaign's impact on your fundraising capability, you may want to do some comparative data analysis. You will take a moment in time—for example's sake, let's say the five years prior to the campaign—and compare that period to the five years during the campaign. The five-year campaign duration is used here simply as an illustration. Be sure to compare periods of similar lengths when doing your analysis.

What kinds of things might you want to compare?

- Scale of giving analysis (a.k.a. gift pyramid, gift table, chart of gifts)
- Gifts by donor type (individual, corporate, foundation, employee, etc.)
- Gifts by geographic area
- Gifts by primary source of solicitation. (This can give you some insight into the ways in which you deploy your team and provide coaching.)
  - Was Gift X primarily the result of an invitation made by one of your staff members alone?
  - How many personal visits were made before a gift commitment was made?
  - Was a staff member teamed with a key volunteer?
  - Was there an administrative leader present?
- Campaign pledge status/schedule
  - Who is still on pledge? How much more and how long do they have to pay? (If your three lead donors are still on pledge for another five years, that may have some bearing on how you tee up the next effort.)
- Gifts by project
- Annual fundraising

- Gap analysis of wealth-screening data vs. actual gift amounts received (What conclusions can you draw about how closely wealth-screening data resembles actual solicitation results?)

### A NOTE REGARDING WEALTH SCREENING

When I started in the development business, there was no wealth analysis. We just found out what ZIP code the prospect lived in and went from there. A census tract was even better for "predicting" wealth. More than anything else, we just sat around the table with people in the know and decided who "had money" and who "didn't," and we went to those who "had money." Now we do wealth screening on everyone. We do prospect research, profiles, giving propensity studies, and donor dossiers. We are armed with all the data that can help us set goals, understand the timing of the request, and identify the content of the appeal.

Have you asked yourself what part your data played in your actual results? I'm suggesting that we find ways to determine the effectiveness, accuracy, and value of wealth screening. Sometimes it may tell us that we left a lot of money on the table. In other cases, it may simply tell us that the data does not guarantee what a person's actual gift might be. Data does, however, give us the opportunity to recognize when there is a gap and to ask, "What's really going on here?" It forces us to create more of an individualized assessment around those particular donors—one that can only enrich our approach next time around. I don't recommend doing a comparison of wealth screening vs. actual results with a large number of donors. Just focus on your top 100 donors. Doing this demonstrates your overall growth and your growth in the subsets of your program: planned giving, foundation/corporation, major gifts, and so on.

One of my constant themes is "Do less, not more." While this sounds counterintuitive, you surely recognize that you only have so many hours in a day. It's really a matter of working smarter. You have to be laser focused on the things that matter most. This kind of comparative data analysis intensifies the issues that are deserving of management's attention. Staffing and stewardship changes may surface as areas that need additional focus. For example, if you have recently gained large numbers of donors in the major gifts segment and you have rebalanced the donor base from a majority of lower-level

donors to a majority of higher-level donors, how do you staff that? These are relationships that require stewardship. What personnel and deployment decisions should you make differently in this situation?

It typically takes about 90 days to go through this type of analysis, assuming you have the good fortune of accessing quality data that you can trust. If not, the act of compiling and cleaning data adds time to the analysis step.

## PERSONAL INTERVIEWS

If you decide that you want to assess the opinions of leaders, staff members, and/or donors regarding the campaign, you may want to do some qualitative interviews. Consider interviewing foundation leaders, board members, campaign leaders, selected donors, and even your marketing and PR/communications teams. The availability of time and money will govern how far you can venture. You needn't go overboard. Great value and insight can occur from fewer than two dozen in-depth interviews.

Question areas could include:
- Effectiveness in meeting campaign goals
  - Allow the interviewee to interpret what the goals were
  - Goals should be monetary and non-monetary
- Evaluation of the following specific campaign elements:
  - Fundraising strategies
  - Donor research
  - Solicitation by board and campaign volunteers
  - Campaign management

- o    Campaign communications and marketing
- o    Donor and volunteer recognition
- Sources of personal gratification from campaign
- Reflections on lessons learned during the campaign
- Perceptions of organizational image and culture of philanthropy
- The future role and focus of the foundation or development department

I ask these questions of everyone:  board members, staff, administrators, donors, and campaign leaders. Why? I want to find the hidden gems among the constituents. I do not care if they are on the staff or the board. I always seek to discover that pure spot of motivation in each interviewee so I can report that to the client, who can then rebalance and refocus their energy to appropriately engage that person. In a perfect world, you would have sit-down conversations with all your best thinking partners, your friends, and your top 500 donors. In reality, this is not going to happen. So when you are doing the assessment, determine who the people are that would really benefit the most from this type of in-depth discussion. Who would be most enriched by this discussion, and from whom can you learn the most?

The value of doing these 60-minute encounters is that they are so rich in learning potential. They provide you with the chance to harvest the interviewees' observations from their campaign participation. Keep in mind, however, that the interviews do not yield representative data. You cannot take the responses from 25 people and assume that all your staff, administrators, campaign leaders, and donors feel the same way. This type of interview is not designed to be a statistically valid representative research methodology.

Rather, the interviews give a shared sense of ownership to the people whom you have interviewed. There is value for the participants in taking part in these interviews. It fosters continuity and it sparks leaders' interest in planning. What I hear often from the participants is, "What are you going to do with this? Are you going to share this information? I'd really like to see what this all leads to." Board members and even some staff who were previously tired by the campaign often begin to ask, "What's the next step?"

Allot approximately 60 to 90 days to arrange, conduct, and interpret personal interviews. We'll talk more about who should conduct these interviews in Chapter 4.

## SURVEY RESEARCH

Plan to do some survey research if your primary interest is understanding donor attitudes, beliefs, and perceptions that shape philanthropic behavior. Obviously, if you are doing an in-depth, one-on-one interview, you can probe and go much deeper on key topics. If you are doing a survey through a self-administered questionnaire or an online instrument (either distributed by e-mail or via an online survey tool such as Zoomerang or SurveyMonkey), you have the opportunity to ask some of these questions, but you will not be able to get into the same level of depth.

Conducting survey research provides an opportunity to test how donors feel about their giving experiences, their areas of philanthropic interest, and what efforts they might support in the future. This process engages many more donors to share ideas and attitudes, which leads to stronger relationships and continued support. Insights gained enable communication plans to be specifically tailored to build stronger relationships

with new supporters and to upgrade donors for future support. Donor preference data allows for segmentation that informs customized donor-centered recognition planning.

The scope of your survey research might include the following:

- Perceptions of your organization and how current and potential donors relate to it
- Sources of information and perceptions of the quality of that information
- Level of familiarity with your foundation/development department
- Understanding of the function/purpose of your foundation
- Motivations for giving and reasons for not giving
- Familiarity with various methods of giving
- Recognition preferences
- Other types of causes/organizations supported
- Ranking of considerations when making gift decisions
- Likelihood and emphasis of future support
- Demographic questions
- Interest in further information

A suggested survey sample might have 3,000 randomly selected campaign and non-campaign donors, segmented according to their identities and relationships with the organization. Segments could include recent gift levels, status as a first-time donor or continuing donor, involvement with the organization (board member, employee, non-employee, grateful patron), and area of residence.

With a survey sample of this size, you should target a completed survey pool of 250 to 400 donors. Anticipate a response rate of 8 to 13 percent for this type of mailed, self-administered survey.

The survey process requires more time—approximately 90 to 120 days. Depending upon the average age of donors in the survey pool and the degree to which you have e-mail addresses and contact information for them, you could consider sending an e-mail invitation to take an online survey instead. This option sometimes requires less time than a self-administered written mail survey or a telephone survey.

In addition to the obvious benefits of having survey research findings in a post-campaign environment, there are other far-reaching benefits. A common refrain from development professionals is one of feeling trapped into a "wait and see" mode as the organizational plan and vision emerges. Organizational leaders may hold plans close until they are finalized, then asking the development team to raise the money. At that point, it often seems too late to try to understand constituent perspectives, leaving development officers to rush headlong into interviews that attempt to test the case with little consideration for larger packaging and communication issues. The post-campaign attitudinal research can mitigate this problem.

First, learn what is in the hearts and minds of your donors and what *they* are willing to invest their philanthropic resources in. Once you know this, you can then shape your internal conversations with administrative leaders as project decisions are being reached. You can present the priorities your constituents want to support and find out how the organization's goals and objectives align with that. This places you in a stronger partnership role as opposed to a late-stage support role. Thus, a post-campaign assessment that includes survey research has a short-term payoff of providing insight to

the success of the last campaign; it has a long-term payoff of reducing (but not eliminating) the inevitable project alignment discussions that precede every campaign.

# Chapter 3:

# Data, Question Types, and Implications

This chapter focuses on comparative data analysis. For each type of data, I have listed the points of comparison that you may want to consider. Keep in mind that these are *examples* of questions. Because no two campaigns are identical, you should avoid a "one size fits all" approach to the post-campaign assessment.

Sometimes I go into the analysis with these questions in mind. Other times, unique client situations and my innate curiosity drive me to come up with questions that had not occurred to me prior to beginning the process. Remember to go beyond natural curiosity to find more than what might simply be interesting to note. You're looking for analysis to produce insight, thereby adding value to your subsequent decision making.

## SCALE OF GIVING ANALYSIS

Points of Comparison:

- Equal lengths of time
- Pre- to post-campaign

What to look for and questions to drive analysis:

1. Have we moved donors to higher levels of giving? (How? Why? When?)

2. Are we equally successful in all tiers? (Why? Why not? Was that our intent?)

3. Is there evidence of greater effectiveness from a major gifts focus?

4. What does the number and size of gifts per tier tell us about our donor pool?

Some might ask why it is necessary to analyze the scale of giving, and why it really matters as long as the dollar goal was reached. I believe we need to keep the donor continuum and our lifelong relationships with donors in the forefront of our thinking. For example, if we are doing really well at the bottom and at the top, but we seem to be shrinking in the middle gift tiers, that suggests we may want to initiate some kind of interventional communication or engagement strategy in an attempt to bolster our relationships with these donors.

## GIFTS BY DONOR CATEGORY

Points of Comparison:

- Equal lengths of time
- Pre- to post-campaign

What to look for and questions to drive analysis:

1. Has our mix of donor types changed as a result of the campaign? How?

2. What conclusions can we draw from this mix?

3. What donor category provides the greatest number of gifts?

4. What donor category provides the most money?

5. What does this comparison tell us about staffing and stewardship?

## Gifts by Geographic Area

Points of Comparison:

- Amount raised per each area

- Average gift size by area

- Percentage of total dollars raised per each area

- Number of donors per each area

- Demographic characteristics of each area

- Percentage of all donors per each area

What to look for and questions to drive analysis:

1. What can we deduce about donor proximity to our facilities? Does proximity really have the bearing (frequency, size, personal participation) that we think it does?

2. How does the geographic distribution of donors align with census wealth data? Are we seeing any shifts? (Census data are periodic, so this is just a good check-in with the overlay of our campaign results to see if we are finding movement in people.)

3. How do these findings change our thinking about staff deployment and communications concentration? How can we communicate in a concentrated and effective way? Some institutions have very broad geographic distributions of donors, so you could ask the question, "Are we placing people, attention, and resources where donors and prospect concentration is heaviest?

4. How do these findings change our thinking about board composition? It is important not to put only those people with resources on the board, but to also look for potential board members in those areas that are clearly supporting our work and using our facilities.

## PRIMARY SOURCE OF SOLICITATION

Points of Comparison:
- Primary source category
- Number of donors per category
- Dollars raised per category
- Average gift size per category
- Percentage of total gift revenue raised per category

What to look for and questions to drive analysis:
1. What does this tell us about effective use of staff (as measured by average gifts raised per FTE)?

2. What does this tell us about effective use of volunteers?

3. Does this data suggest the need for more/fewer staff members or volunteers?

4. Based on results, would we change our solicitation methods? If so, how?

5. How can we use these results to coach allies and deepen the understanding and culture of philanthropy?

## GIFTS BY PROJECT

Points of Comparison:

- Equal lengths of time
- Pre- to post-campaign
- Gift income
- Percentage of total raised per project
- Number of donors per project
- Average gift size per project
- Percentage of total donors per project

What to look for and questions to drive analysis:

1. With which projects did we have the greatest success? Why?

2. Were all projects fully funded to goal? If not, why not?

3. How do our results shape our stewardship efforts with those who donated to these projects?

4. How does campaign performance compare to earlier initiatives? What can be learned from migrating donor interest (if any)?

5. Of all the funds supported, which comprise 80 percent of all gift income and 80 percent of all donors? How does that discovery change our strategies?

## PLEDGE STATUS

Points of Comparison:

- Pledge payment attrition rate (campaign start to date)
- Pledge conversion ratio by donor type
- Average length of pledge
- Aggregate pledge payment schedule (total by year)
- Number of donors making pledge payments by year

What to look for and questions to drive analysis:

1. What does this information tell us about our donor communication and engagement efforts after the pledge is made?

2. Is the pledge payment attrition rate within acceptable standards? If not, why not, and what must be done to lower it?

3. How many donors are still on a payment schedule? Which donors are still on a payment schedule (i.e., are they your best donors)?

4. What does this data tell us about donor availability for special project support and the timing of the next campaign?

## CAMPAIGN IMPACT ON ANNUAL FUND

Points of Comparison:

- Equal lengths of time
- Pre- to post-campaign
- Annual gift income
- Number of annual fund donors

What to look for and questions to drive analysis:

1. What impact did the campaign have on the annual fund? How? Why?

2. How effectively did we communicate the annual fund case parallel to or as part of the campaign case?

3. What conclusions can we make about annual donor acquisition, retention, and upgrade during the campaign?

4. What methods contributed most to annual giving results?

5. How would we assess the level of integration among all fundraising programs?

## GIVING GAP ANALYSIS

Points of Comparison:

- Top 100 donors
- Equal lengths of time
- Pre- to post-campaign
- Period to period variance
- Actual to wealth-screening variance

What to look for and questions to drive analysis:

1. What can we infer about the campaign's ability to upgrade top donor giving from the previous period? Did the campaign become what we wanted it to be, which was a stretch mechanism for people?

2. How were wealth-screening findings used during the campaign?

3. Did actual gifts secured resonate with our donor research and rated gift capacity?

4. What can actual campaign results for the top 100 donors tell us about the quality and accuracy of our wealth-screening data?

5. Do these learnings lead us to approach wealth screening and/or detailed prospect research differently in anticipation of the next campaign?

6. Did we "leave money on the table"? If so, why? What will we do now?

### ANOTHER NOTE REGARDING WEALTH-SCREENING TOOLS

We should always take time to assess the value of the wealth-screening tools we use. One of the great challenges that full-time development professionals have is the amazing array of tools at our disposal. It is entirely possible that you could never leave your desk or talk to a single human being, because you become handcuffed by another great tool that will give you even more insight into your donors. On the other hand, you could spend 45 minutes with one donor and discover a tremendous amount of information by asking several simple questions.

I am a strong advocate of doing prospect research and wealth screening, but I urge you not to get trapped in "analysis paralysis." Go back and assess whether the methodology had practical value for you. You may decide that you do not need to use it as often, or you may decide that it is the best money you have ever spent.

While the above may seem like an overwhelming array of information, consider that I'm suggesting these eight data categories as the most fruitful places to start. Analysis can be quite invigorating if you have a clear idea of what your main question is and how you will use it before diving into the data. When analyzed a category at a time, I believe the task is manageable and the results worthwhile.

# Chapter 4:

# Logistics

## WHEN TO CONDUCT A POST-CAMPAIGN ASSESSMENT?

So when is the best time to do a post-campaign assessment? It can be done at any time, but you will find the greatest value if you do it within six months of the close of the campaign. This is the honeymoon period, during which there is a certain time of excitement and reflection. The learnings are going to be much clearer because the campaign is still fresh in people's minds. As a bonus, donors will be more responsive with their gifts and their desired outcomes fresh in their minds. It is a great capstone experience when you engage campaign leaders and donors in in-depth interviews and survey research. It provides them a way of almost punctuating their involvement in the campaign, making their efforts seem rewarding and worthwhile.

Additional rationale for completing the assessment within this six-month window is that every campaign seems to bring its own challenges of data irregularity and

inconsistencies. By conducting the assessment, you are able to catch many of those inconsistencies and correct them before all lived experience is lost to distant and blurred memory.

## WHO SHOULD CONDUCT THE POST-CAMPAIGN ASSESSMENT?

There are three different parties who can conduct the post-campaign assessment. Each brings advantages and disadvantages, so you will need to discern which is right for you. Let's explore each separately before looking at a hybrid approach.

### 1. Development/foundation staff
- Foundation president (CDO), project manager, campaign director
- *Advantage:* direct knowledge, vested interest, continuity, relationships
- *Disadvantage:* vested interest, opportunity cost of personal time, too close to the project / lack of objectivity, decreased candor from participants

I seldom suggest putting anyone between the chief development officer or field-oriented staff and their most-valued donors and prospects. Those connections are magic. Development/foundation staff have the relationships, the knowledge, and the vested interest, thus providing the greatest access and continuity. The downside is that they may not be able to see everything objectively after working on the campaign for several years.

When choosing a staff member for this project, you need someone with good business acumen, excellent relational and communication skills, and a healthy measure of diligence. This person also needs an analytical mind and some inherent curiosity. After all, you can only script so many of the questions. After that, this task simply requires

avid listening and periodically asking, "Where does that answer take me? What are the trends? What else might I want to know?"

Certainly, various studies and reports indicate that philanthropy is moving toward a professional staff model. We are growing up as a profession, and our institutions are spending money on relationship building. There are now more of us who can go out and create valuable relationships with donors. As long as we remain donor focused, trust naturally grows from that. This can provide tremendous growth opportunity for the future.

### 2. *Vested volunteer*
- Requires uncommon time commitment, analytical and communications skills
- *Advantage:* direct knowledge, trust, commitment growth, fosters leadership
- *Disadvantage:* experience may be too limited for analysis, inherent sensitivities, lack of donor candor, intense time and commitment required

The advantage to having a vested volunteer do this is his or her direct knowledge of and experience with the product. The volunteers you are looking for will have a lot of trust, appreciation, and respect for the organization. There is real power in this. Getting a volunteer involved deepens his or her commitment and fosters leadership.

Another advantage to getting volunteers involved in the assessment is continuity. Philanthropy is still a business fraught with staff turnover. That discontinuity stifles any good development program. Sometimes volunteers who are committed to their communities can help bridge some of the gap in continuity caused by staff turnover.

Obviously, the disadvantage is the difficulty in getting volunteers to spend that kind of time and effort. They would have to be in a fairly unique set of circumstances to do so. However, there may be a way to un-bundle the elements of the analysis and have two or three people split up the work. There can be downsides to this, however, since you give up some continuity in the analysis. The fewer people involved in analysis, the greater the synergy in moving from one category of analysis to another.

3. *Campaign counsel or trusted consultant*
   - Requires significant experience with campaigns, research, and analysis
   - *Advantage:* knowledge, third-party objectivity and credibility, concentrated focus, frees staff for daily responsibilities, increased candor through third-party inquiry, greater validity in information gained, a set of data-driven strategies.
   - *Disadvantage:* Cost

One of the biggest advantages to hiring outside counsel is the firsthand knowledge the consultant has accumulated after having been through a number of campaigns. Knowing the right questions to ask is a big part of this.  Those who are close to the organization may feel more comfortable providing honest answers to counsel rather than to internal staff. There are also things that may be uncovered during the process which are better said in a report by objective outside counsel than by organizational leaders and staff. This is particularly true if volunteer participation in the campaign was determined to be a weak point. That message can often be accepted better from counsel than from staff.

The primary disadvantage is cost. If this investment is built into the original campaign budget, you will not have to try to find the money later. Obviously, the assessment's

expense is an investment in the future of your development program and should, therefore, be seen as leading to longer-term positive returns.

## *4. Hybrid approach*

You may find that a hybrid version of the above three approaches suits you best. You would first need to determine the scope of the assessment and the methodologies that would be used. The roles of the staff/volunteer and counsel can then be defined according to the following guidelines:

**Role of Staff / Role of Counsel**

If staff or volunteer conducts the analysis:

- Staff or Volunteer Role:
    - Co-determine the scope and methodologies
    - Identify and enlist those to be interviewed
    - Assemble the data to be analyzed
    - Arrange and coordinate interview schedule
    - Pull the survey sample for donor database (if using survey method)
    - Analyze all data; develop conclusions and recommendations
    - Present findings to interested parties

- Counsel's Role:
    - Co-determine the scope and methodologies
    - Co-determine the data to be assembled and analyzed
    - Coach the project leaders and implementation team

      o   Assist, as necessary, in drawing survey sample for research integrity

      o   Assist, as necessary, in reviewing conclusions

If outside counsel conducts the analysis:

- Staff's Role:
  - o   Co-determine the scope and methodologies
  - o   Identify and enlist those to be interviewed
  - o   Assemble the data to be analyzed
  - o   Arrange and coordinate interview schedule
  - o   Pull the survey sample for donor database (if using survey method)

- Counsel's Role:
  - o   Co-determine the scope and methodologies
  - o   Co-determine the data to be assembled and analyzed
  - o   Guide the staff in drawing survey sample for research integrity
  - o   Analyze all data; develop conclusions and recommendations
  - o   Present findings to interested parties

I would suggest that you consider bringing in counsel in more of a remote capacity, helping you determine the scope and the methodologies by saying, "Based on my experience and based on what you have said you want to accomplish, I don't think you need to spend the resources to do X as much as you need to do Y." Counsel can help you prioritize, weight, and value the data to be assembled and analyzed. You may also want to involve outside counsel in coaching your project leaders and your implementation team. This coaching should go beyond the logistics to include alerts about the things you might expect under various circumstances.

The difference between a project consultant and a consultant partner is that a partner thinks about himself or herself as being as vested in your outcomes as you are. Working as a partner, your consultant will ensure that you draw the correct conclusions. In addition, a consultant's third-party objectivity might push you to consider whether you have truly taken your analysis far enough, or whether the results simply confirm your original thinking.

# Chapter 5:

# Conclusion

My philosophy has always been "Less technique and more talk." When I wrote earlier, "Do less, not more," that is part of what I am talking about. If you can sit down with donors and prospects during a post-campaign analysis (or at any other time) and ask them a few basic questions, you can unlock huge opportunities for planned gift discussions that might not otherwise occur. Here are a few examples of questions that can be asked:

- What are your greatest hopes for this community?
- What do you feel you have been called to do?
- What impact do you really want to make?

It all comes back to spending time with your donors. If you could spend quality time with just 20 or 25 of your very best prospects or donors, what three questions would you ask that would unlock the most learning about them?

As you ponder those questions and reflect on your own campaign trajectory, consider the benefits of conducting a post-campaign assessment. To get started, ask yourself these questions:

1. Is the timing right for us to conduct a post-campaign analysis?

2. How does my thinking about a pre-campaign audit change as a result of considering the scope and benefits of a post-campaign analysis?

3. What is most important to know or understand from the campaign we are soon to complete or have just completed?

4. How would I conduct the post-campaign assessment? Will it be staff-led, volunteer-led, or outsourced to counsel? Who will take on these tasks?

5. In what ways could the post-campaign assessment propel us to plan the next phase of our work?

I look forward to hearing from you about your experiences and insights.

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# Appendix

# Assessment Components

(Note: Methodology is governed by what you want to learn, your budget, and the time available.)

| Your Interest | Methods to Use | Value | Timing & Cost[4] |
|---|---|---|---|
| Know that our philanthropy operational house is in order | **Internal operations review.** This should mirror the scope of the pre-campaign audit (NOT the feasibility study)<br>▪ End-of-campaign status (Any donors unasked? Any who said "come back later"? All program goals achieved?)<br>▪ Institutional issues<br>▪ Board infrastructure, activity, and relationships<br>▪ Staffing and organization<br>▪ Programs, policies, and operating procedures<br>▪ Database, systems, and technology<br>▪ Community relations/marketing<br>▪ Budget | 1. Provides a "state of the foundation" view post-campaign<br><br>2. Provides a full context picture of the philanthropy program, beyond the funds raised<br><br>3. Yields a better understanding of the maturity of the fundraising operation | 60 days<br><br>$5,000–$10,000 |
| Determine the campaign's impact on our fundraising capability | **Comparative data analysis** (pre-campaign to post-campaign)<br><br>▪ Scale of giving analysis<br>▪ Gifts by donor type<br>▪ Gifts by geographic area<br>▪ Gifts by primary source of solicitation<br>▪ Campaign pledge status/schedule<br>▪ Gifts by project<br>▪ Annual fundraising<br>▪ Gap analysis of wealth-screening data vs. actual gift amounts received | 1. Demonstrates overall and subprogram growth<br><br>2. Identifies issues deserving management's attention<br><br>3. Surfaces staffing and stewardship challenges | 90 days<br><br>$10,000 |

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[4] Costs assume outsourcing to counsel and are only rough estimates. Each of these methodologies can be implemented by staff as time, interest, and experience is available. Methodologies can and should be combined to achieve timing and cost efficiencies.

| Your Interest | Methods to Use | Value | Timing & Cost[4] |
|---|---|---|---|
| Assess campaign leader and staff opinions about the campaign | **Personal interviews** (20–25) [qualitative research]<br><br>■ Foundation staff/leaders, board and campaign leaders, selected donors, marketing team<br>■ Question areas include:<br>  – Effectiveness in meeting its goals<br>  – Evaluation of the following specific campaign elements: (a) fundraising strategies, (b) solicitation by board and campaign volunteers, (c) campaign management, (d) campaign marketing, (e) donor and volunteer recognition<br>  – Sources of personal gratification from campaign<br>  – Reflections on lessons learned<br>  – Perceptions of image and culture of philanthropy<br>  – The future role and focus of the foundation | 1. Deepens the shared sense of ownership<br>2. Harvests personal learnings from participation<br>3. Fosters continuity<br>4. Sparks leaders' interest in planning | 90 days<br><br>$15,000–$20,000 |
| Understand the donor attitudes, perceptions, and behaviors that lead to gift support and recognition of the organization's brand | **Survey research** (quantitative research via phone, print or e-mail distribution, and/or online (e.g., Zoomerang or Survey Monkey)<br><br>■ Suggested survey sample characteristics: 3,000 donors, randomly selected (campaign and non-campaign donors) and segmented according to their identities and relationships with the foundation (i.e., recent gift levels, first-time donor or continuing donor, foundation involvement [board member, employee, non-employee, grateful patron], and area of residence)<br><br>■ Target size of completed survey pool: 250–400 donors<br><br>■ Anticipated response rate: 8%–13% | 1. Engages donors to share ideas and attitudes, which leads to stronger relationships and continued support<br>2. Enables donor subgroup comparisons<br>3. Insights gained enable communication plans to be specifically tailored to build stronger relationships with new supporters and to upgrade donors for future support<br>4. Donor preference data informs donor-centered recognition planning | 120 days<br><br>$20,000–$30,000 |

# Data, Question Types, and Implications

| Data Report | Points of Comparison | What to look for and questions to drive analysis? |
|---|---|---|
| **Scale of giving analysis** | ▪ Equal lengths of time<br>▪ Pre- to post-campaign | 1. Have we moved donors to higher levels of giving?<br>2. Are we equally successful in all tiers?<br>3. Is there evidence of greater effectiveness from a major gifts focus?<br>4. What does the number of gifts per tier tell us about our donor pool? |
| **Gifts by donor category** | ▪ Equal lengths of time<br>▪ Pre- to post-campaign | 1. Has our mix of donor types changed as a result of the campaign? How?<br>2. What conclusions can we draw from this mix?<br>3. What donor category provides the greatest number of gifts?<br>4. What donor category provides the most money?<br>5. What does this comparison tell us about staffing and stewardship? |
| **Gifts by geographic area** | ▪ Amount raised per each area<br>▪ Average gift size by area<br>▪ % of total dollars raised<br>▪ # of donors per each area<br>▪ % of all donors | 1. What can we deduce about donor proximity to our facilities?<br>2. How does donor geographic distribution align with census wealth data?<br>3. How do these findings change our thinking about staff deployment and communications concentration?<br>4. How do these findings change our thinking about board composition? |
| **Primary source of solicitation** | ▪ Primary source category<br>▪ # of donors per category<br>▪ Dollars raised per category<br>▪ Average gift size per category<br>▪ % of $ raised per category | 1. What does this tell us about effective use of staff?<br>2. What does this tell us about effective use of volunteers?<br>3. Does this data suggest the need for more/fewer staff or volunteers?<br>4. Based on results, would we change our solicitation methods? How?<br>5. How can we use these results to coach allies and deepen the understanding and culture of philanthropy? |
| **Gifts by project** | ▪ Equal lengths of time<br>▪ Pre- to post-campaign<br>▪ Gift income<br>▪ % of total raised per project<br>▪ # donors per project<br>▪ % of total donors per project | 1. Where did we have the greatest success? Why?<br>2. Were all projects fully funded to goal? If not, why not?<br>3. How does campaign performance compare to earlier initiatives? What can be learned from migrating donor interest (if any)?<br>4. Of all the funds supported, which comprise 80% of all gift income and 80% of all donors? How does that data change our strategies? |

| Data Report | Points of Comparison | What to look for and questions to drive analysis? |
|---|---|---|
| **Pledge status** | ▪ Pledge attrition rate<br>▪ Pledge conversion ratio by donor type<br>▪ Average length of pledge<br>▪ Aggregate pledge payment schedule (total by year)<br>▪ # of donors making pledge payments by year | 1. What does this data tell us about our donor communication and engagement efforts after the pledge is made?<br>2. Is the pledge payment attrition rate within acceptable standards? If not, why not, and what must be done to lower it?<br>3. How many donors are still on a payment schedule? Which donors are still on a payment schedule?<br>4. What does this data tell us about donor availability for special project support and the timing of the next campaign? |
| **Campaign impact on annual fund** | ▪ Equal lengths of time<br>▪ Pre- to post-campaign<br>▪ Annual gift income<br>▪ # annual fund donors | 1. What impact did the campaign have on the annual fund? Why?<br>2. How effectively did we communicate the annual fund case parallel to or as part of the campaign case?<br>3. What conclusions can we make about annual donor acquisition, retention, and upgrade during the campaign?<br>4. What methods contributed most to annual giving results? |
| **Giving gap analysis** | ▪ Top 100 donors<br>▪ Equal lengths of time<br>▪ Pre- to post-campaign<br>▪ Period to period variance<br>▪ Actual to wealth-screening variance | 1. What can we infer about the campaign's ability to upgrade top donor giving from the previous period?<br>2. What can actual campaign results for the top 100 donors tell us about the quality/accuracy of our wealth-screening data?<br>3. Do these learnings lead us to approach wealth screening and/or detailed prospect research differently in anticipation of the next campaign?<br>4. Did we "leave money on the table"? If so, why? What will we do now? |

# About the Author

Gary J. Hubbell is founder and president of Gary Hubbell Consulting, LLC. He has thirty years of experience helping nonprofit organizations fulfill their missions—through planning, adaptation strategies, and resource development.

Gary holds a Bachelor of Arts degree from the University of Michigan (1978) and a Master of Science degree in Organization and Management from Capella University (2004). He is an active author and speaker. His independent research resulted in the publication of his first book, *Forces of Change: The Coming Challenges in Hospital Philanthropy (2005).* His second book, *Lessons from Benchmarking: Fast-Forwarding the Maturity of the Fundraising Operation,* co-authored with Mary Reinders, was published in 2007. *Staff-Led Feasibility: How to Design and Conduct Your Own Fundraising Feasibility Study* was published in January 2009.

Gary Hubbell Consulting, LLC works with organizations on the cusp of doing great things—articulating innovative philanthropy models, engaging board members and stakeholders in unprecedented ways, sparking transformational change within organizations and communities. Clients contact Gary to seek help in developing strategies that foster organizational agility, in setting plans in place around which commitment runs deep, and in determining how to generate philanthropy and other resources to fuel the resource engines of the future. For more information, contact Gary at 414-962-6696, or online at www.garyhubbellconsulting.com.

Gary Hubbell Consulting works with organizations on the cusp of doing great things—articulating innovative philanthropy models, engaging board members and stakeholders in unprecedented ways, sparking transformational change within organizations and communities. We listen to clients with an ear for key issues and an eye on the horizon. No issue or opportunity appears in isolation. Our deep knowledge and innate ability help organizations see through an ever more chaotic marketplace with clarity and agility. We bring research and resources to help you view opportunities and challenges in new ways.

Especially during challenging economic times, asking the right questions and accurately assessing environmental factors can mean the difference between success and failure. Sometimes transformational change for your organization may be necessary. Other times, adjusting your perspective and language can make the difference. One thing doesn't change—your organization's need to live out your mission and achieve your vision.