Brakeley Briscoe
Considering Philanthropy

Finding Campaign Leadership

Every campaign I have advised, over more than four decades, has succeeded because it had strong leadership. And when campaigns have been less than successful, leadership has been the heart of the challenge. The synergy and single-minded dedication of the leadership team — the CEO, the chief development officer and the volunteer chair or chairs — makes all the difference between a perfunctory campaign and a hugely rewarding one. When it comes to the pace-setting gifts at the top of the gift pyramid, moreover, there is no more important player than the volunteer chair or chairs. And these leaders are truly hard to find these days.

Sometimes, during the pre-campaign planning and feasibility study, an obvious candidate who evokes the admiration and respect of all emerges from the process. But more often than not, the volunteer leadership outlook is murky at best. So how do you find and recruit the "right" person or persons to champion your cause?

We often recommend a formal leadership selection process, replete with an ad hoc committee, at least one and sometimes a series of meetings, lots of strategizing, and a high level of candor and setting aside of personal agendas. Here's how it works.

Role and Function Statement

The first step is a role and function statement that unambiguously sets forth the criteria for the ideal campaign chair(s) set in the context of the client's special circumstances (versus boiler-plate). The criteria include: a true believer in the cause; able to articulate that belief; respected by all; ready to make the very best gift he or she can make; fearless about asking others to give.

A useful complementary document is a description of "Predictable Demands on the Chair's Time", which lays out all of the meetings, tasks and other requirements that the campaign will impose on its leaders during the campaign (ending of course with a qualifier that says, "…plus that which we cannot anticipate").

Leadership Search Committee

The next step is forming a leadership search committee, which should comprise the CEO, the Board chair (who usually serves as the committee's chair), the Development Committee chair, the chief development officer, the campaign consultant, and perhaps six other volunteers who either represent key segments of your constituency or are themselves possible campaign chairs — or, ideally, both. The committee's role and function statement makes it clear that this is as serious an assignment as obtaining a nine- or ten-figure gift, requiring the same kind of careful research, planning and structuring. Members are told that, if we're lucky, we might be done in one meeting, but it could well stretch out over several months and a number of meetings.

Preparation for the first meeting, which will take about two hours, includes a list the client has drawn up with the names of 30 to 40 possible candidates — some intimately involved in the organization's life, others more distant, a few purely speculative. Staff should prepare background information on each candidate which is not handed out but which the chief development officer and the consultant have in front of them. And this is a lot like a leadership gifts committee meeting.

At the meeting, brief the committee on what it needs to accomplish and urge members to be as candid as they can be about the candidates, even if they feel a bit uncomfortable about the process. Distribute and review a one page description of the criteria for top- level campaign leadership and the "probable demands" paper. Then distribute the list of candidates (only, without the background information). Tell the committee members that, while their own names are on the list, they will not be asked to say anything about themselves until later on. Then ask members to discuss the list, rating each name as a group: 1:good candidate; 2: maybe; 3: not a candidate.

Conversation about each name can take as little as a minute, but usually takes longer. Members may be reticent at first, but they usually warm up quickly. Once the initial ratings are done, ask the committee who is missing from the list. Some more names may be volunteered, and they should be similarly rated. Then ask the committee to review all of the 1's and rank-order them. The goal is to finish with a list of about six people who are all very good candidates, ideally in priority order.

Campaign Volunteers

At this point I like to say, "Now let's go around the table and hear what each of you has to say about your own willingness to be a campaign volunteer and at what level." If you've been astute in selecting the committee membership, this can easily be where the rubber hits the road, in that your very best chair candidate may be sitting there taking all of this in.

While the process focuses on group conversation and consensus, some of the best outcomes arise from behind the scenes strategizing and conversations. Recently, during a feasibility study interview I found what I believed to be a good campaign chair candidate and so, ahead of the leadership committee meeting and with the clearance of top leadership, I asked him if he was genuinely interested and, if so, what he might say at the meeting. So when the round- the-table comments came to him, he told the group how important the institution is to him and his wife and stated that, if asked, they would serve as co-chairs. The committee's immediate response was highly supportive, and he and his wife were elected by acclamation. A bit later in the meeting he announced what they would give, which he and I had discussed earlier as well - and it was a very good number indeed. Would that we should all be so lucky!

But what if you don't get that lucky? In that case, go back to the list of 6 (not an arbitrary number — could be fewer or more) and talk about who the clear #1 is, then numbers 2 and 3 and so on. If time allows, determine who the right person or persons might be to ask the #1 candidate to serve (the CEO and the Board Chair often take on this assignment), and begin to lay out the strategy, plan and the next steps for that crucial ask.

Further Investigation

Sometimes, however, the picture is not yet clear enough to allow you to proceed in that way. There may be some further investigation to be done about some of the top candidates, such as consulting a third party who is not on the committee or commissioning some really in-depth research. It may be that the CEO, Board Chair, Chief Development Officer and campaign consultant need to meet as a sort of rump sub-committee to sort out matters the committee cannot or should not address. Whatever the outcome, unless you have your chair, set the date for the next meeting of the full committee.

If additional meetings are needed, their agendas will be driven by whatever homework will have emerged from the first meeting, but priority #1 will be to focus on the same 5 or 6 top candidates (although a new name or two may have emerged in the meantime), review their rank order, and develop the strategy for approaching the top candidate or candidates.

In this fluid and flexible process you avoid a common pitfall — asking someone to chair without a well-considered strategy — which too often results in multiple unsuccessful "asks." There can be no more important selection in the campaign than finding the right chair or chairs; do it well.

*Updated from an original Brakeley Briscoe article by George A. Brakeley III