



**SEMC 2026**

# **Getting Your Board Ready for Campaign**

Allan Burrows, CapDev CEO

Leila Thomas, CapDev Senior Counsel



*Serving nonprofits across the Southeast since 1984*

Development Planning & Campaigns  
Executive Search



## About Us

Since 1984, CapDev has been making nonprofits better through inclusive philanthropy consulting and search services.

### Our Mission

CapDev partners with nonprofit communities to enlist, empower, and embolden its leaders to embrace the transformational power of inclusive philanthropy.

### Our Principles

#### **Enlist**

We identify and connect leadership.

#### **Empower**

We partner to build sustainability.

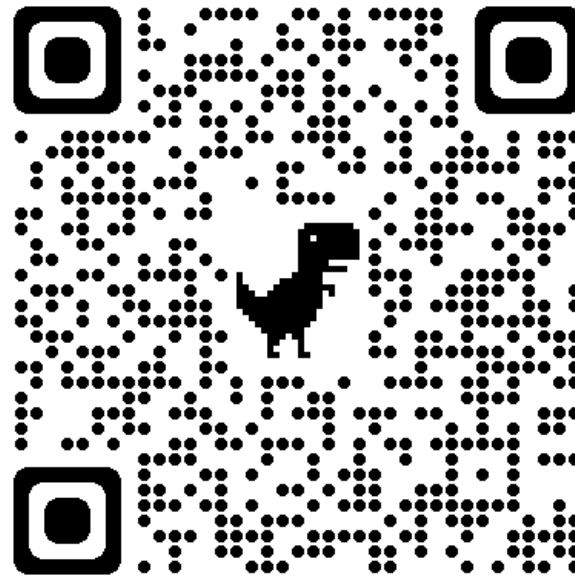
#### **Embolden**

We encourage talent and leadership.

#### **Embrace**

We transform lives through relational philanthropy.

Download today's slides:





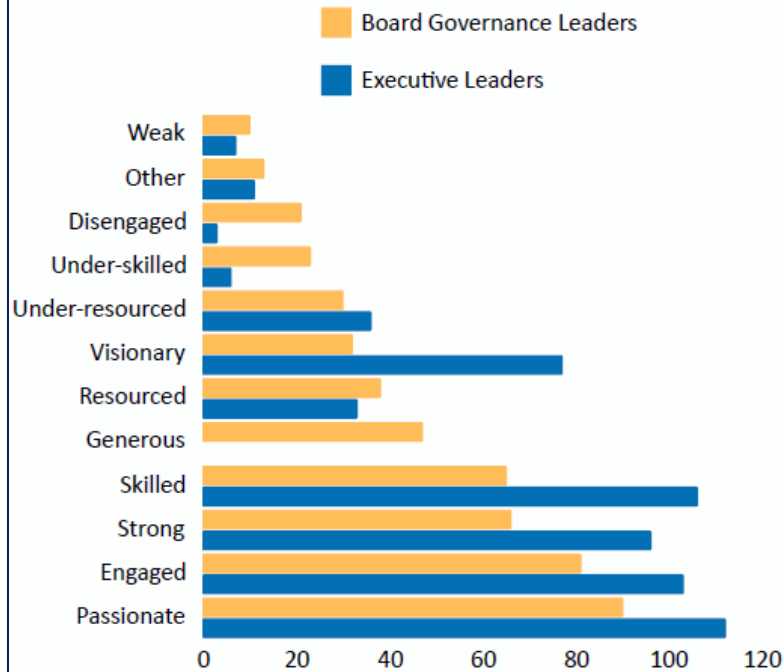
# How is your board?



# Do you have a “fundraising board?”

Figure 4: Perceptions of Executive Leadership & Board Governance Leadership, Compared

- With your organization in mind, what words best describe your perception of Board Governance leaders?
- With your organization in mind, what words best describe your perception of Executive leaders?



## CapDev’s Compass Report Findings:

- 30% consider their board “generous”
- “Visionary” – twice as high for executive than for board leaders
- Executive leaders outrank board on:
  - Skilled
  - Strong
  - Engaged
  - Passionate





# Is the board you have the board you need?

**For campaign**, does your board include leaders with:

- Fundraising acumen
- Philanthropic relationships
- Campaign experience
- Vision/Strategy + Process/Details skills
- Commitment to volunteer as hosts, connectors, askers...

In preparation for campaign, do you have:

- Solid governance structure → *campaign as catalyst for board growth*
- ★ 100% Giving Board ★



# Campaign: Catalyst for Board Growth

**Examine your board structure** in preparation for campaign:

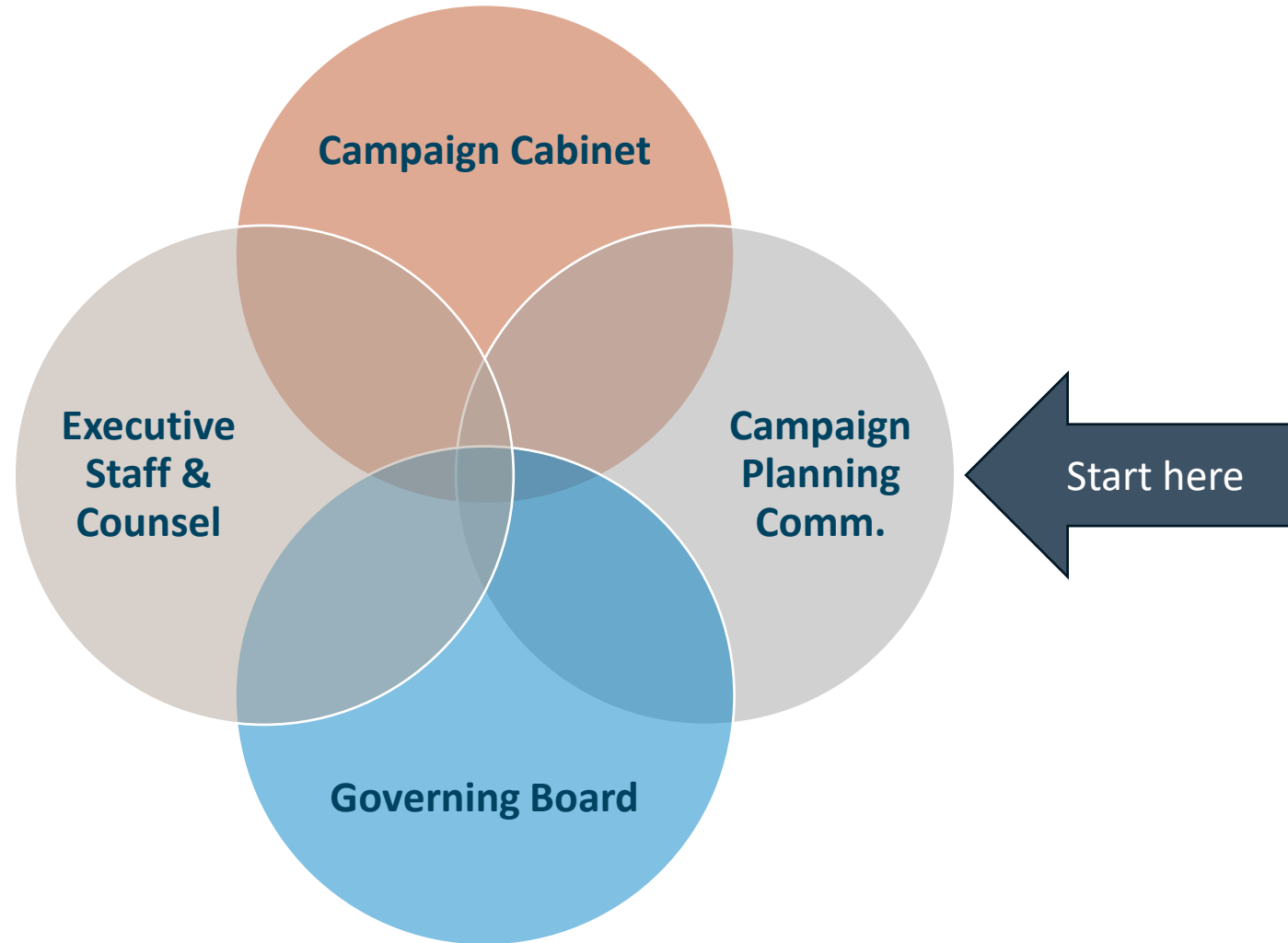
➤ Client example **Marbles Kids Museum**: 30 board members, term limits

- How are board members enlisted?
- How are board members onboarded?
- Expectations for involvement in philanthropy?
- Understand how to be an engaged board member?
- Board roles in annual campaigns?
- Development Committee involvement? Advisory?
- Consideration of a **Campaign Planning Committee**?

# Early Buy-In & Board Engagement



# Leadership Roles Start with Campaign Planning





# Campaigns Start with a Planning Committee

The **Campaign Planning Committee** oversees the planning and preparation phase of the proposed capital campaign, and is responsible for:

1. Development and approval of the case for support
2. Assist with identification and evaluation of major donor prospects and campaign leadership
3. Advise on effective leader and major donor cultivation and recruitment strategies
4. Host a donor cultivation event, meeting, tour, or other donor educational activity
5. Review and approve campaign goals, objectives, and strategies
6. Identify and recruit **Campaign Cabinet** members
7. Approval of campaign budget and campaign infrastructural changes
8. Attend regular (monthly) meetings

Once the **Campaign Cabinet** is created, the work of the **Campaign Planning Committee** is complete.



# First Steps to Campaign with Your Board

Start with the vision

Enlist small Planning Committee  
(with a board liaison)

Determine if Feasibility Study is  
needed

Engage campaign consultant



# Moving Towards Campaign with Your Board

Engage in **case building** (prioritize campaign components)

**Goal setting** ("Need" / working goal)

**Budgeting** (build in cost of campaign)

**Donor/Leader list development**

## Board Roles & Campaign Roles

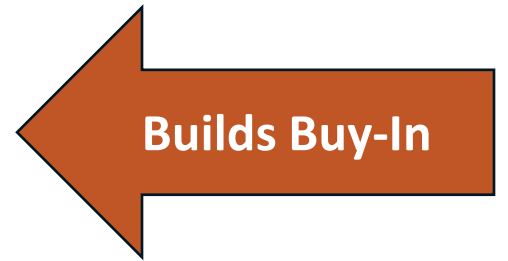
“What is the Board’s Role in a Major Campaign”



# Building Engaged Board for Campaign

## 1. Start providing board education well before campaign starts:

- Vision & strategy (Case for Support development)
- What to expect in campaign
- Hiring consultants
- Roles & timelines



## 2. Board representation (liaisons) on Campaign Planning Committee and Campaign Cabinet is critical

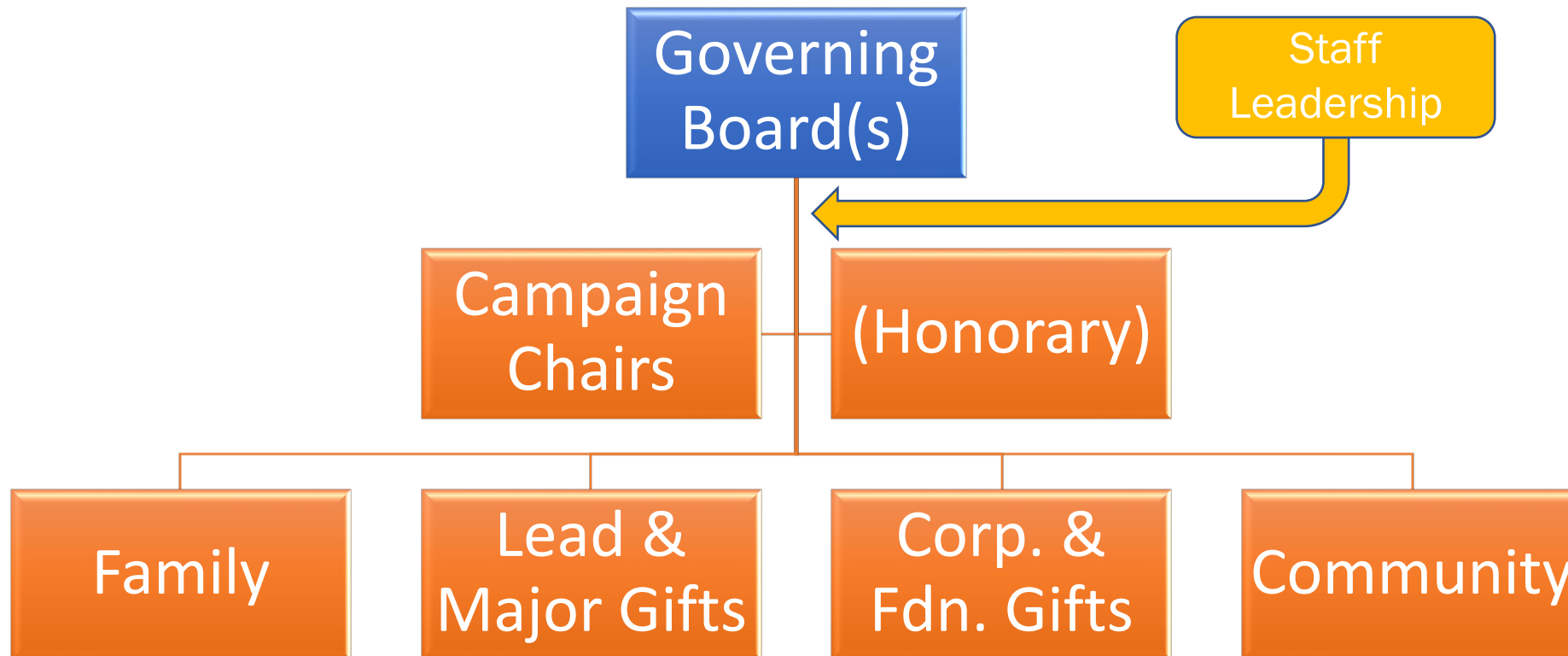
- Right person(s) – respected by board and by community
- Helps to bring along those on board who are not fundraisers

## 3. Tell your story

- All board members are able to speak to the campaign



# Sample Campaign Org. Chart





# Then Appoint the Campaign Leaders:

## Characteristics:

- Knowledge
- Reputation
- Relationships
- Connections
- Experience
- Commitment
- Resources
- Time

## Sources to Consider:

- Current/Past Board Members
- Current/Past Donors
- Community Leaders
- Corporate Leaders
- Potential Future Board Members
- Current/Past Committee Members
- Diversity (ethnic, gender, age, geographic...)



# Campaign Players

## Consider the roles for:

- Board of Trustees
- Foundation Board
- President/CEO/ED
- VPs / C-suite
- VPs/other key staff leaders
- Campaign leaders

### Notes to Remember:

- “Selected;” not “elected”
- “Board Development;” not “Nominating”
- Major campaigns are Board-led & Staff-supported



# Board's Role in Campaign & in Philanthropy

- **KNOW!** Understand the mission/campaign and advocate
- **OWN!** Take responsibility in campaigns
- **GIVE!** Make organization a “Top 3” philanthropic priority
- **INFLUENCE!** Ensure 100% board participation in giving
- **LINK!** Leverage relationships and make introductions
- **SPEAK!** Engage & educate prospective donors
- **WRITE!** Sign & send thank you notes
- **SHOW UP!** Participate in events
- **ASK!** Take part in solicitations as appropriate
- **STEWARD!** Thank and account for gifts
- **CELEBRATE!** Recognize successes!



# Equipping Board Members for Campaign Success

- Gift chart
- Profiles
- Giving levels and naming opportunities
- Note cards for writing thank you notes
- Swag: gift to MG prospects





# Staff Roles in Campaign & in Philanthropy

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- **Be prepared** and organized
- **Be sensitive** to time constraints
- **Be adaptable** to leaders' schedules
- **Be responsive** and supportive
- **Be knowledgeable** about relationships/contacts
- **Be proactive** and capture all donor details and cultivation strategies in the database



# Roles & Expectations - Help Everyone Stay on Task

## Consultant

- Guide campaign and lead strategy

## Campaign Chair / Cabinet

- Motivate leaders and drive campaign

## Board

- Engage in various aspects, at differing levels

## Staff / Campaign Manager

- Provides resources, logistics, info, tools, relationships, stories, data, recognition, communications, media policy

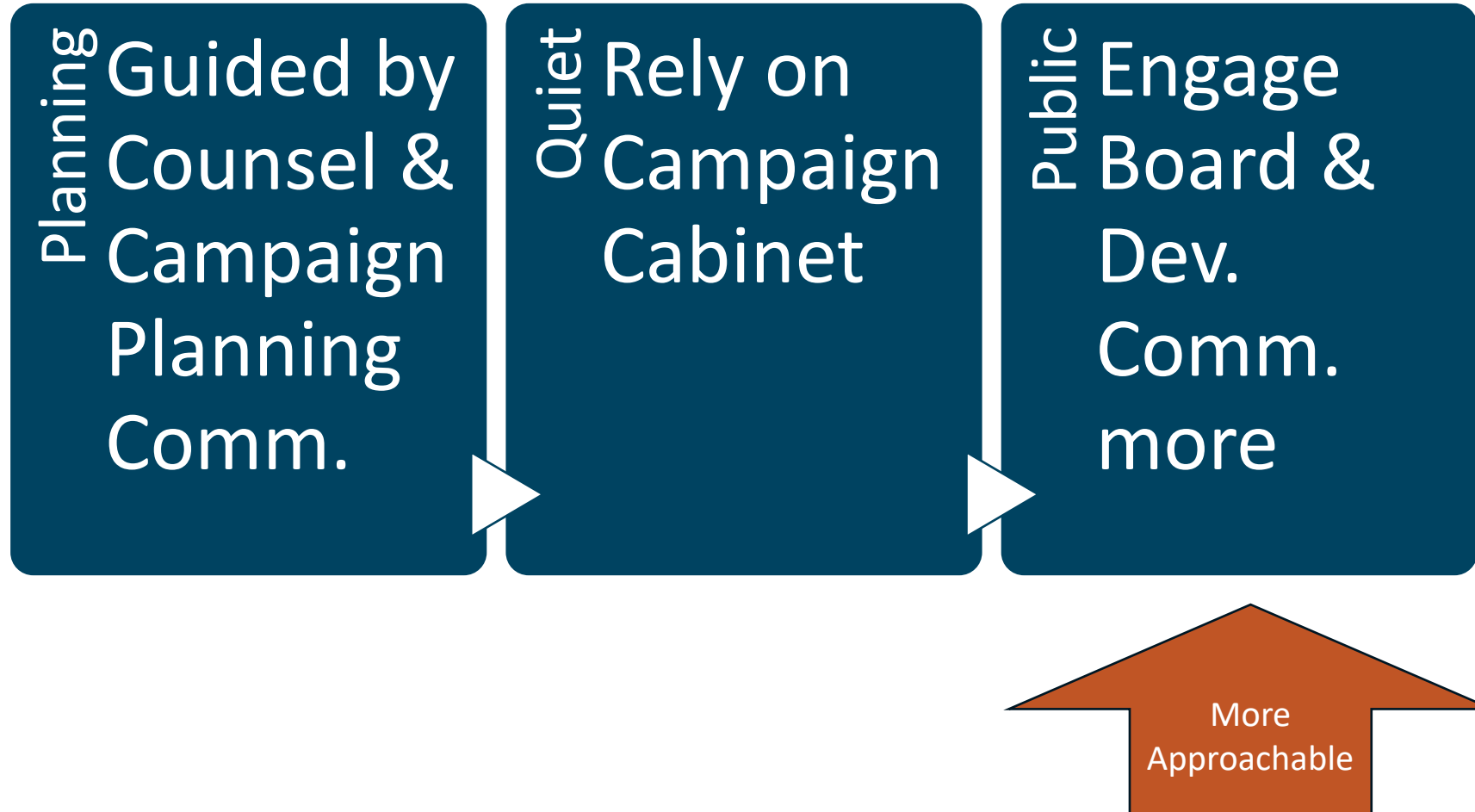
## Critical Success Factor:

- Regular meetings
- Check-ins with key leaders





# Leadership Roles in Phases of Campaign





# Public Phase Board Involvement Example

## Marbles Big Idea Forum:

flash mob to launch

Follow Up Mailing – board wrote personal notes to 100 targeted prospects





# NC Aquariums: “Fintastic” Public Kick-off





# Make Space for Creativity & Innovation



# NC Aquarium Society

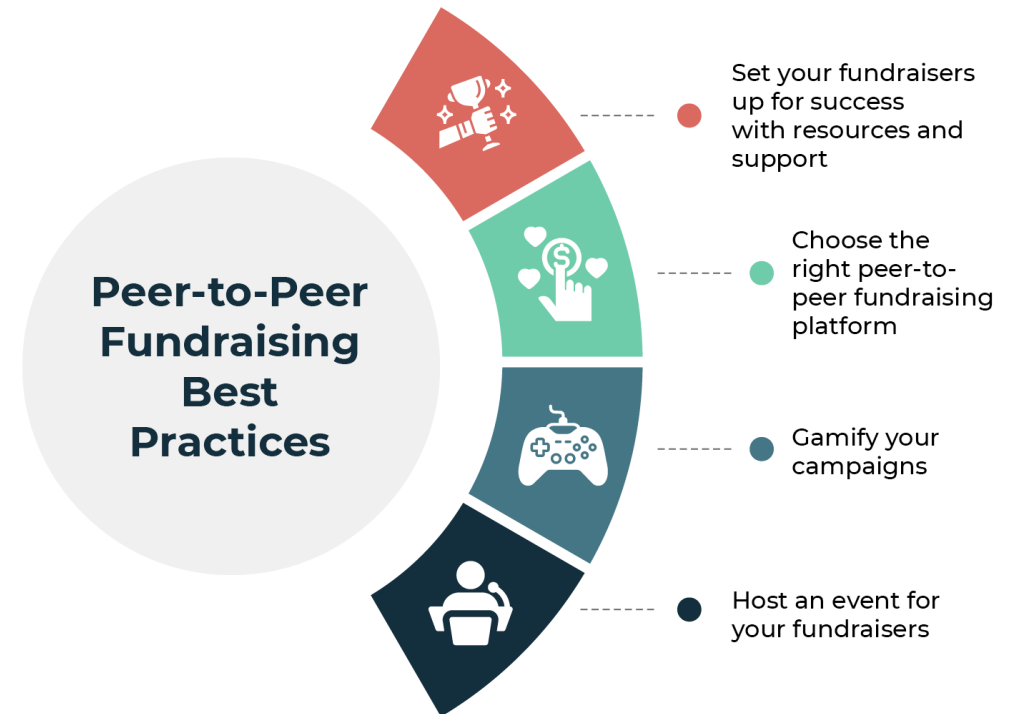
- Hosted small community gatherings / neighborhood dinners
- Helps potential donors feel like insiders
- No ask at the event
- Follow-up is critical
- Received gifts from many first-time donors





# Marbles Kids Museum

- Peer-to-Peer board teams based on relationships to get board to 100% giving
- Board member(s) serve on Campaign Cabinet
- Board members' giving encouraged some on Campaign Cabinet to increase their gifts





# Recognize & Thank Campaign Volunteers



# Marbles: Celebrate Board Giving





Thank you

SEMC 2026!



Q&A and Discussion