The Capital Campaign Chair: Finding and Working with Your Campaign CEO

Campaigns succeed or fail primarily on the strength of their leadership. Consequently, identifying, recruiting, soliciting, managing, motivating, and working with a campaign chair should receive top priority.

Choosing the Right Chair

The campaign chair should wear several hats. He or she will make a leadership contribution, as well as recruit and solicit the leadership gifts committee. He or she will lead this team on many of the most important calls that will be made on the top 30 to 50 prospects.

The chair also will act as the public spokesperson for the campaign, as well as provide the internal leadership for the organization in times of travail - and we all know that capital campaigns have their flat spots and problem periods, where reliable leadership is essential.

The campaign chair should be the following:

- A visible, recognized leader of unimpeachable reputation in local, regional, or national communities - depending on your institutional identity and geographic constituency;
- Someone with the interest, desire, and time for your effort;
- A person with charisma, salesmanship and positive faith to think creatively and react constructively to both good and bad news;
- Someone accustomed to setting goals and accomplishing them within set time frames;
- Someone who puts a premium on planning; and
- A lead donor who leads by pace-setting example with his or her gift and level of involvement.

The strongest candidates are success stories: corporate CEOs, successful developers, dedicated board members, bankers, attorneys, philanthropists, and even doctors.

Considering Co-Chairs

A growing trend is to choose co-chairs. Benefits of that approach include the following:

- Co-chairs increase the amount of time that top leadership can give to the job, a key factor in an era when volunteers have limited time to give.
- With co-chairs, back-up is assured if one fails to deliver - and no campaign can afford a head who does not make things happen.
- Both can make leadership gifts, thereby doubling early results.
- Co-chairs allow for a mix of leadership profiles - male/female, local/national, older generation/younger generation.
- The number of co-chairs can vary. In cases of diverse national, geographic, local, and regional constituencies, several co-chairs can be effective.

- Using couples as chairs also is helpful. Spouses can be effective counterparts to the other spouse's participation in a campaign. They can serve meaningful leadership, enforcement, participation, and meeting attendance roles.

Finding the Correct Chair

A built-in advantage for each organization lies in knowing who is interested, who has given big gifts, who will lead, and who led the last campaign. But do not stop there: Conduct substantial research on all your constituencies and look at other campaign successes and institutions in your area.

Take the time to talk to other campaign leaders in your area, because this will open dialogue with experienced, campaign-savvy people.

Conducting research in your area can yield fruitful prospects. Examining regional annual reports may uncover prospects on local corporate or foundation boards, as well as top donors to other charities.

Rating the Attributes of a Chair

After conducting the initial research and narrowing the pool of candidates to a manageable list, use the following four criteria to evaluate the top prospects:

- Capacity to give
- Interest in giving
- Contacts to the person involved
- Leadership capability

Then, take those four attributes and the list of about 60 to 75 top prospect individuals to several key players in the campaign and ask them to rate the candidates.

Incorporating this phase with the feasibility study allows selection and prioritization of confidential, one-on-one interviews between counsel, top prospects and prospective chairs, and thereby helps plan your campaign and surveys your environment.

Once a campaign plan is formed and all campaign materials are assembled, the chair can be recruited, allowing the recruiters to present him or her with initial descriptions of gift opportunities, job descriptions, goals as defined within the scope of the campaign, programs and goals for each division, a clear role for the board, and a thorough budget, along with a timeline and organizational chart.

Recruiting the Chair

The number one rule of recruiting the chair is: Always make sure that at least one member of the recruitment team is an individual to whom the person being recruited cannot say no. A peer, a business partner, a relative, a friend - whatever the connection, it should be somebody who commands the potential chair's respect.

Some choices for your recruitment team include:

- The former or present chairman of the board.
- The chief executive of the organization.
- The chairman of the last campaign, who can convincingly relate his or her positive experience, the benefits, and the amount of time spent in the position.
- A close peer, who is a board member and credible to the individual.

At this point, some organizations enlist an honorary chair and then give that person the role of recruiting the chairman. The honorary chair should hold importance in the community and probably be past the life-cycle period where he or she would chair a campaign. But, by accepting the position, the honorary chairmanship adds credibility to a campaign.

Setting up the Meeting

With your organization and key players prepared, the potential chair can be asked to consider the leadership position in your campaign.

Of course, some logistics must be ironed out, such as meeting places. Usually professionals are comfortable in office settings, but increasingly with couples, the home can suit everybody's needs.

Also at this stage of the campaign, a small *ad hoc* committee or a Steering Committee may be created temporarily to help plan the campaign and recruit the chair.

Nonprofit professionals used to follow an ironclad rule that when they recruited, they solicited the prospect. More recently, this rule has become more of a judgment call. Often prospective leaders are being asked to chair for the first time, and they are terrified. Thus, the recruitment and orientation of the chair and the leadership gifts committee can provide ample sight-raising and ice-breaking prior to solicitation. So, consider carefully the person being recruited, the culture of the institution, the individual's readiness, and his or her place in the campaign.

Working with Rejection

Occasionally in campaigns, organizations approach their star chair, and he or she says no.

There are all kinds of turn-downs, but "no" should never be accepted as an answer, at least not the first time. Sometimes prospects simply want to be convinced on the second go-around. Some other strategies include:

- Leverage the request: Involving a spouse, the family, friends, and others can be advantageous.
- If the first co-chair offers a turndown, the other co-chair can be brought on board and then sent back to recruit that first co-chair.
- Try the back-door approach of getting an honorary chair with the singular duty of recruiting chairs.

If you cannot recruit the initial chair, you can proceed with several other first choices. In capital campaign chairmanships, there are no second choices, because nothing extends the campaign and causes morale to sink more than not succeeding with your first choice. Just in case, prepare contingency plans and strategies for further selections.

Working with the Chair

The most effective way to work with the chair or co-chairs is to create early success by ensuring that the chair's or co-chair's first solicitation experience is positive. This will instill confidence in the chair, as well as keep the entire organization's morale high.

The chair's second task is recruiting and soliciting the leadership gifts committee. In that job, the chair experiences immediate success, because those individuals are familiar and they are good solicitations.

The third job is ensuring the organization's board works and gives to capacity, which usually is a good task for the chair. The board needs to be educated, which is a natural job for the chair and an ideal vehicle to get them off to a good start.

The Development Officer's Role

The development officer's primary function is to be the critical point person. He or she maintains focus and sets priorities but must be careful not to overload the chair or chairs. Here are some tips for success:

- *Try not to rush in the early stages*. Avoid cramming the campaign planning - for your chair particularly - into one or two meetings.
- *Hold regular, disciplined meetings*. Especially at the start of the campaign, weekly meetings work well. Schedule them with an eye for time, efficiency, discipline, enforcement, and morale.
- *Do not worry the chair with details*. Remember, your primary role is to keep the chair on target.
- *Remember that the chair is your CEO*. You report to that CEO. Plan your events and calendar early so that you can notify the chair.
- *Never bring the chair into a meeting less than fully briefed*; always avoid putting him or her in the position of discovering information he or she was not aware of during the meeting. Have your materials together, and be sure the chair knows what to expect, what to do, where to go, and how to get there.

Recognizing the Efforts

One of your primary roles with the chair is to acknowledge his or her special nature and contributions to your efforts.

Campaign publicity often means a great deal to chairs. We recommend showing appreciation through publicity in the community, in front of their family, or through special awards.

Leading To Success

Finally and most importantly, the development officer should recognize that he or she has an important role in keeping key volunteers in a proper, good-humored frame of mind. So make sure you plan correctly, go forward well-prepared, have the campaign planning done well in advance, and devote ample time and attention to making sure the chair feels good about his or her efforts.

While the success of a campaign is assured by a strong campaign chair, in the final analysis, the development officer plays a critical role as a manager and catalyst.