Outline of a Campaign Planning Study; Feasibility Study

The first step in a proposed capital campaign is to design and implement a feasibility or campaign planning study (CPS). Its purpose is to assess objectively the possibility of raising funds for the project and to serve as the basis on which to build a capital campaign if the research indicates positive support for such an undertaking. The CPS does not decide on the feasibility of the project; that is the responsibility of the organization.

1. Purpose of the Study
It must be understood by all participants, especially by the members of the Board or Governing Council, that the goals of the campaign planning study go beyond simply determining the potential private sector support. The goals are to:

- Assess the strengths and weaknesses of XXX relative to its ability to carry out the proposed campaign
- Establish, in the minds of those most closely involved with the agency, the fundraising principles on which the campaign will be based in order to succeed
- Identify the extent to which leadership candidates are available for a volunteer-led fundraising program
- Assess the potential for significant support
- Identify likely prospects for major gifts
- Consider the desirability of including a planned giving component to the capital campaign if there is the potential for an Endowment Fund
- Evaluate the potential for a direct mail component to the capital campaign
- Sensitize the donor community to the fact that XXX will be coming to it for support in the near future
- Stimulate excitement and ownership among the agency’s constituents

2. Campaign Planning Study Process
While no two studies are exactly alike, certain key steps are required in every campaign planning study. The following specific steps are generally undertaken during the study process; these will be refined in consultation with the initial campaign committee:

- Collect and review information to acquire a familiarity with the XXX and the plans for XX and the various renovations and expansion plans
- Develop a list of interviewees (ranging in number from 30 to 75), including a cross-section of service clubs, church groups, community leaders, Board members, volunteers, current donors, special constituency groups such as previous major donors and business leaders
- Prepare a list of questions for the interviewees, to be approved by the initial campaign committee
- Make appointments for and conduct interviews, in person or by telephone, with representatives of key prospects
- Analyze interview results and make recommendations; and prepare and present a final report

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3. Interview Process
The basic principle in the capital campaign planning study is to ask those from whom XXX is most likely to seek support for their opinions on the likelihood of the campaign succeeding, their possible level of support, and their willingness to become actively involved in the campaign.

Selection of interview candidates is the most critical step of the whole process. Prospects with whom XXX can claim a personal or business affiliation will be preferred over those with whom no previous connection exists. A carefully prepared set of questions is used as the basis for an interview with the prospects in order to learn the likely degree of support for the case and their personal level of interest.

While the interview has specific objectives in terms of questions and answers, the qualitative information it generates is vital to the subsequent analysis. For this reason the person(s) conducting the study must be seasoned professionals, able to conduct themselves in a mature manner and represent the organization well. The interviewee is offered strict anonymity in the interview – his or her remarks are never divulged directly. The information is used for quantitative analysis and specific, unattributed comments may be used in the report to demonstrate the attitudes of the respondents.

The use of outside consultants is essential at this stage of a capital campaign planning process. Interviewees are much more open and forthright with someone from without a personal stake in the outcome of the study. Indeed, we have frequently been told by interviewees: “I’m only telling you this because you are not directly connected with the institution.”

4. Analysis, Recommendations, and Report
After the interview process is completed, the consultants and the steering committee will jointly review the results and establish recommendations for the Board of Directors. Among the issues to be addressed are the following:

• How much money can XXX expect for the proposed purposes?
• Are traditional capital campaign strategies the best or only way to proceed?
• What level of support is evident from individuals, foundations, groups and corporations?
• Have sufficient major donors been identified to achieve the levels of support required in the gift range table?
• What is the potential for volunteer fundraising versus staff or consultant-driven fundraising?
• How much will it cost to reach the goal? How should the campaign be managed – internally, by outside consultants, in some combination?

After this analysis is completed, a report will be drafted for review by the steering committee and, following their input, a final report prepared for presentation to the Board. Included in this report will be a summary of the plans for a campaign, if the study results warrant such a move.

*Based on Betsy Clarke & Associates*