

BENEFITS OF A PRE-CAMPAIGN STUDY

A strategic study focused on a select group of organizational stakeholders prior to launching a capital campaign accomplishes several things. The activities generally undertaken in such a study take about four months and include writing, testing and refining a compelling case for support; one-on-one interviews with key major gifts prospects; written surveys of board members, other volunteers and staff, and/or focus groups; assessment of the organization's capacity to reach the stated financial goal and to manage a campaign. As a result of these activities, the organization can fully expect to achieve an understanding of:

- **Your best prospects.** Together, counsel and the organization will thoroughly research and identify your best prospective donors for this campaign, and strategically select from among them those individuals, corporate representatives, grantors and others who must be invited to participate in the pre-campaign planning study.
- **The appeal of the proposed project and an assessment of the credibility of the proposed project in the donor community.** Potential donors are the only ones who will decide whether and when a gift is made; they must have knowledge of and confidence in the organization as a first step to making a gift. Pre-campaign studies identify opportunities for organizations to better understand how they are perceived by donors and the community at large, build awareness of their mission and the services they provide, as well as sharpen their proposed case for support.
- **Knowledge of what levels of financial support can be expected from potential donors and other supporters.** An indication of available financial support for a proposed project is a critically important outcome of a pre-campaign planning study. Very often, specific gifts can be identified in the course of a study.
- **Indication as to what key players must be involved in the campaign to attract the gifts and gift levels needed to reach your campaign goal.** While financial resources are first and foremost in the minds of volunteers and staff, the reality is that effective leadership is as important, if not more important, than money. Today's campaign leadership must be active, committed volunteers willing to give and solicit key gifts, and to motivate and encourage other campaign volunteers. Through the study, counsel will identify those people whose commitment to the organization and influence among the giving community make them natural leaders for this campaign.

We provide the following services for our clients:

- **Preparation of a preliminary case for support and final draft based on the interviews.** This preliminary case for support is a critically important cultivation tool for potential campaign donors. For many of them, it represents the first opportunity to consider the organization’s vision of its future and plan for achieving that vision. The preliminary case for support is generally a simple, printed document.
- **One-on-one confidential interviews with selected study participants,** including key board and staff members, targeted individual and corporate donors with the capacity to give, past grantors and others who are essential to the realization of the campaign goal and timeline. The quality of interviews is as important as, if not more important, than the quantity of interviews conducted. We will work with the organization to identify and select those interviewees whose opinion and counsel are critical to our ability to assist you in making informed decisions about launching a successful campaign.
- **Development of the study questionnaire,** including specific questions designed to focus on the distinctive needs of the organization, the accompanying letter requesting the interview; and identification of the signer of the letter.
- **Careful consideration and selection of potential interviewees,** utilizing the knowledge and experience of board, staff and direct-service volunteers close to the process. These interviewees should, at once, represent a geographic cross-section of your service area; reflect both ability and potential interest in contributing at a high level; and serve as both opinion leaders and voices for their constituencies. Our interviews are structured so as to identify other key people with whom we should talk during the course of the study.
- **Confidential interviews with identified participants.** Confidentiality is essential to maintaining an interview atmosphere of openness and candor. It serves to help establish a rapport between interviewee and counsel that allows for productive discussion. In addition, each interview provides the opportunity to educate the prospect about your organization, respond to questions and concerns, and share “inside” information with the prospect – all effective cultivation tools for future giving.
- **Results and recommendations presented to the Board of Directors or their designated representative(s), consisting of:**
 - A written **executive summary** of interviews, identifying the most important issues and opportunities resulting from the study and validating these findings with direct quotes gleaned from interviews and representative of the prevailing viewpoints;

- A written **analysis of findings** identifying assets and liabilities relating to the organization and its potential for campaign success, opportunities that surfaced in the study and advance notice on issues requiring immediate attention; recommendations regarding any additional staffing required to manage a capital campaign; recommendations regarding any required training for board and staff vis-à-vis their roles and responsibilities in a capital campaign.
- **Conclusions and recommendations**, including a brief outline of how your campaign should unfold; the timetable; costs; chart of gifts (indicating how many gifts are needed at each giving level to reach goal); potential prospects at each gift level as identified by the study.

The findings and recommendations in the final report enable the organization to render highly-informed, strategic decisions regarding the prospective capital campaign and avoid making critical mistakes that can doom the campaign to failure. The information gleaned during the study helps position the organization to achieve a successful and productive result.