



Beginning a Dialogue

The Proactive Interview

A pre-campaign planning study provides an opportunity for your organization to have a meaningful face-to-face exchange with affluent and influential people, through an experienced fundraising consultant. You will not only present your agenda, but learn about theirs— their values, preferences, priorities, and proclivities.

The planning study is based on a standard questionnaire, so it looks deceptively like a survey. In practice, however, the questionnaire functions as a discussion outline, and the role of the study director involves much far than passively recording responses.

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Every interviewee has something important to tell us. To find out what that is, the experienced study director works to create a conversation — a dialogue. Every interview, therefore, unfolds differently. The study director acts as the organization’s advocate, rather than a salesperson; their purpose is to inform, inquire, listen, learn, and reflect.

With each interview, the study director learns more, gaining a keener appreciation of each individual’s potential role

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Achieving & Exceeding Success

“I Know It’s Feasible...”

We talk to a lot of development professionals about their plans for fundraising campaigns and sometimes hear them say, “I know it’s feasible, so we don’t need to do a study!” These individuals are exactly those whose organizations stand to gain the most from conducting an in-depth pre-campaign planning study.

When properly conducted, a planning study will provide an organization with the insight and intelligence to craft a winning strategy to realize its full fundraising potential and achieve more challenging goals.

The fundraising industry has historically referred to this accepted standard of pre-campaign planning as the “feasibility study”. Today’s astute chief development officer is looking to determine much more than the mere viability of their proposed development plans and a simple “go” or “no-go” determination. In other words, much more than simply the feasibility of their plans.

The vanguard of the development industry looks to the pre-campaign study as a critical tool in assessing how their institution is perceived in the philanthropic marketplace and how to plan the success of an aggressive yet attainable major gift fundraising campaign.

A well-conceived and conducted campaign planning study will open an important and detailed dialogue about your institution and its future plans with key members of your donor constituency. It evaluates services, organizational strengths, the case for support, campaign rationale, vitality of your volunteer and donor base, and finally the capacity to win your proposed campaign.

Now back to our friends who claim to “know it’s feasible.” We’d like to suggest that they base their opinion of institutional readiness, in part or wholly on the following factors:

1. A clearly stated organizational mission that is relevant and realistic and is used to focus the organization’s activities.

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The Proactive Interview

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in the proposed campaign, and will begin to identify patterns of influence (or networks) that might be utilized.

An experienced study director, like a campaign director, is always looking for a connection - an opportunity to make something happen.

Going into the interview, the interviewer is thinking, "Who exactly is this person? What can he/she tell me that nobody else can? What do I need to find out about this individual? Where could he/she fit into a strategy for a successful campaign? What connection(s) could this person help us to make? Could I begin to facilitate some of that right now?"

As the interview winds down, the study director is thinking, "Is this conversation really finished? Should I follow up by phone, or try to schedule a second meeting? Are there questions I need to get the answers to, or more information I need to provide?"

An experienced professional has the experience, expertise and "sixth sense" to think and respond in this way. He/she knows how to ask, listen, read the signals, and interpret the results. That involves much more than simply taking the temperature of the interviewees. The interview process is dynamic. Acting as an advocate for your organization and a confidant of the interviewee, experienced fundraising counsel will begin to see what needs to be done, and be positioned to initiate the first steps in that direction.

Ten Sequential Steps to Success

If you anticipate conducting a pre-campaign planning study, be sure to allow sufficient time for fundraising counsel to plan and lead your organization through an inclusive process. Counsel will need to prepare for and conduct the study interviews, then carefully analyze the data, and prepare and present the final report with insightful findings and action-oriented recommendations to the appropriate leadership. To complete all of the following steps, three months or more are typically required.

1. **Plan the process.** Senior management, trustees, and counsel meet to plan the study and assign responsibilities.
2. **Preliminary case for support.** Counsel conducts research and interviews in order to prepare a brief, but informative description of the organization and the proposed campaign objectives.
3. **Prospective interviewees.** Identify 70 to 100 individuals and organizations capable of making or influencing major gifts.
4. **Schedule the interviews.** A letter will be sent to each prospective interviewee, and appointments scheduled by phone.
5. **Interview questionnaire.** A customized questionnaire will guide the interview process.
6. **Table of standards.** This table, which will be used during the interviews, indicates the size and number of gifts typically required to attain the proposed campaign goal.
7. **Background information on the interviewees.** Staff will be asked to provide pertinent background information on each individual to be interviewed.
8. **Interviews.** The interviews are conducted in confidence, and preferably in person. Most will be conducted one-on-one. In some cases (e.g., a husband and wife), two individuals will participate. A typical interview will require 45 minutes to an hour.
9. **Report.** Counsel prepares and submits a detailed written report. It should include the results of the interviews (including quotations without attribution); findings and conclusions; and recommendations.
10. **In-person presentation.** Counsel meets with the board and staff leadership to summarize the findings and recommendations, and discuss the next steps to be taken.

In many cases, the study will be accompanied by a strengths-based internal readiness assessment, which evaluates your organizational capacity to implement a major capital campaign, and recommends any additional resources which may be need to succeed.



“I Know It’s Feasible...”

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2. The organization has a written strategic plan that has carefully considered the reality of its operating environment and uses sound administrative practices to outline both short- and long-term objectives.
3. The organization’s operating systems and finances are in order, and have been for quite some time. Major donors want to make an investment in a winning project that can and will be sustained far into the future.
4. You can identify a reasonable number of prospective donors with the financial capability and sufficient interest in your organization to make a pacesetting leadership gift.
5. You have a committed board, staff, and volunteer corps that will follow through with a campaign.
6. The governing board, staff, and volunteers are committed to the success of the organization, as demonstrated by their current giving.
7. You can position your appeal for philanthropic investment in a manner that clearly addresses the urgent needs of your constituents and clients, rather than the internal desires of the institution.

A properly positioned pre-campaign planning study will carefully analyze these factors to determine the best course of action for launching your campaign to achieve the momentum and success your institution so richly deserves. Instead of a simple determination of “yes” or “no,” wouldn’t you rather discover a projected minimum reasonable goal and a breakdown of the size of gifts to be targeted for the largest potential donors? A properly directed study will not only determine if there is fundraising potential for your project, but whether or not volunteers are available to serve as advocates to raise the money. Finally, it should critically assess if the timing is right for your fundraising aspirations.

Unfortunately, too many institutions approach their campaign planning without first working through the critical steps to position themselves for success, and will conduct a feasibility study as an expensive and time-consuming fishing expedition. In short, you should not conduct a pre-campaign planning study without the conviction that the institution can raise money.

By engaging fundraising counsel early in your organizational planning and decision making, you will ensure the pre-campaign planning study will be appropriately used to develop a fundraising strategy to successfully raise all the money that you need. And maybe more!

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Goal Getter

Associated Charities of Ashland County



When leaders at Associated Charities first began thinking about raising funds to build a new facility, they faced a number of challenges. Although they had been providing short-term emergency financial assistance and food to Ashland County (Ohio) residents for over 100 years, too many people in the community were still unfamiliar with the full scope of services and programs offered by this essential nonprofit organization. Having outgrown their current (and outdated) building, but concerned about the success of undertaking a capital campaign without more information, Associated Charities hired GoettlerAssociates to conduct a campaign planning study.

Over the course of three months in late 2014 and early 2015, Goettler conducted the study, which proposed a \$1.5 million campaign to build a brand new facility. The study identified some interesting factors. Leading members of the community, and prospective donors were not sold on the proposed plans to build a new facility on a vacant plot of land. Rather, many people hoped the organization would utilize an existing building located closer to their downtown location. In addition, study respondents strongly recommended that the organization plan to raise funds for an operating endowment, as part of their \$1.5 million goal. Associated Charities's shifted their focus from building, to buying and renovating. The leadership team got to work finding a new location, and re-worked the project budget to include \$1.2 million for acquisition/renovation and \$300,000 for an endowment at the Community Foundation.

Skeptics in the community did not think Associated Charities would pull it off. While their \$1.5 million campaign goal may not appear overwhelming to some, the goal was *seven times more* than their annual operating budget and thus rather intimidating. The campaign planning study report provided timely and accurate guidance, which enabled the board to move forward with confidence. Further, Goettler's recommendations provided a successful strategy to quickly recruit campaign co-chairs and other strong campaign committee leaders. Utilizing Associated Charities' committed base of regular volunteers, and the leadership skills of its Executive Director Rosemarie Donley, a vacant building in downtown Ashland was quickly identified and secured to serve as their new home.

Thanks to important information identified through the planning study process, Associated Charities was able to reach and exceed its campaign goal in just under six months. Had the organization moved forward with a capital campaign before taking this important step, Donley is unsure they would have found success stating, "We could have never envisioned doing this without GoettlerAssociates."

