

# Is the Feasibility Study Dead?

## The Evolution of Campaign Planning

**Presented by:**

Peter G. Kelly, President, Boston Latin School Association

Brian Nevins, Principal and Managing Director, CCS

**Tuesday, August 18, 2015 | 1:00-2:00pm**



Fundraising • Development Services • Strategic Consulting



## Peter G. Kelly, President, Boston Latin School Association

- 20+ years of experience in the secondary and higher education sector

### About Boston Latin

- Founded in 1635, the oldest public school in America
- Alma mater to thousands of notable leaders in business, politics, the arts, etc.
- In 2014 publicly launched the *Prima Perpetua* campaign with a goal of \$50 million



## Brian Nevins, Principal and Managing Director, CCS

- 25 years of experience as a leading consultant for non-profits and the architect of numerous feasibility and campaign planning studies

### About CCS

- CCS was founded in 1947 and is headquartered in New York City, with 11 offices in the US and UK
- Every year, CCS conducts over 100 feasibility and campaign planning studies
- CCS designs and directs development initiatives for local, regional, national and international charities across the spectrum of non-profit sectors



- Study Basics
- Outcomes of a Study
- Lessons for Your Study
- Q & A



## In what sector do you work?

- A. Arts and Culture
- B. Education
- C. Healthcare
- D. Religion
- E. Human Services
- F. Other



Founded in 1844 to raise funds for the school library, BLSA now serves as the **connection** between the **school and alumni and parents**, while also **supporting the students and faculty** of today through its fundraising efforts

BLSA conducted a previous campaign from 1998 through 2004

BLSA benefitted from:

- Strong history of campaigning and big gifts
- Demonstrated philanthropy of donors and prospects
- Case for support rooted in a strategic plan
- Maturing development office

# STUDY BASICS

## Have you ever completed a study?

- A. Yes, we hired a consultant
- B. Yes, we conducted one on our own
- C. Yes, in tandem with early fundraising
- D. No, we dove right in to a campaign!





**Feasibility Study?**

**Campaign Planning Study?**

**Campaign Design Phase?**

**Pre-Planning?**

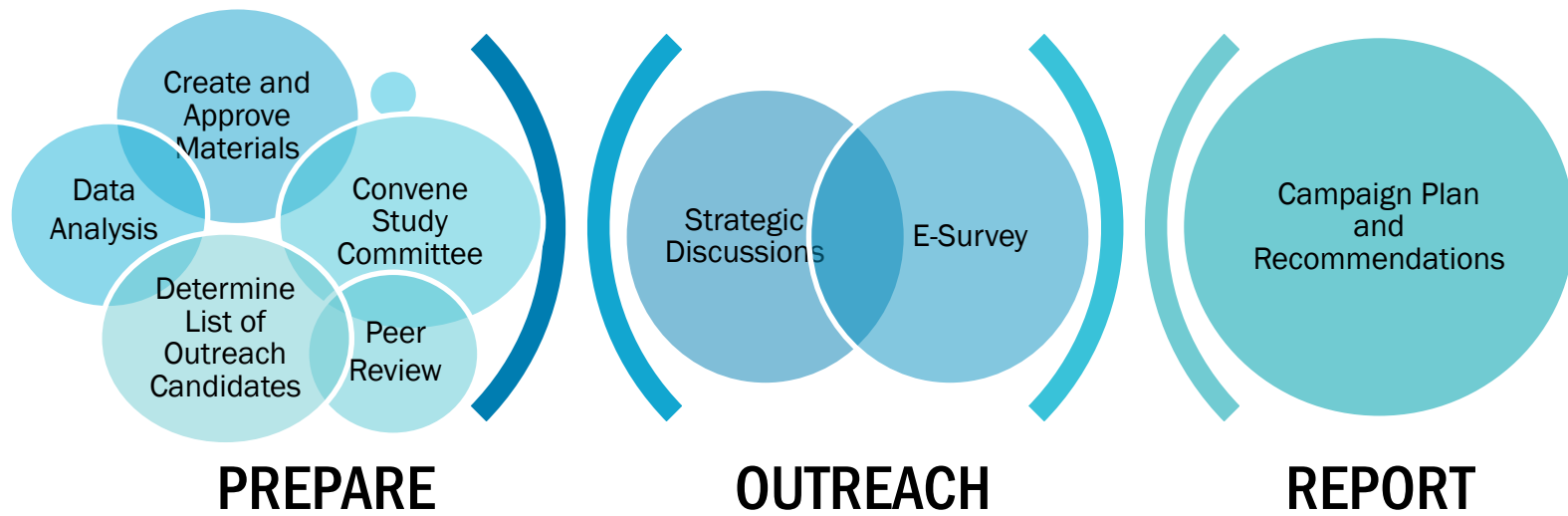




# What Does a Study Get Us?







**Gauge general attitudes toward your organization**

Remind donors of organization's mission and aspirations

What are the organizational strengths and areas for improvement?

**Deepen understanding about project plans and growth**

Bring your institution's closest friends and stakeholders "into the fold"

What are your reactions to the strategic plans and case for campaign support?

**Get to know prospective donors' philanthropic interests**

Quicken the cultivation process

Where is our organization on your list of philanthropic priorities?

**Discover inclinations to get involved as a volunteer or donor**

Invite donors to take a leadership role

Will you be meaningfully involved? Will you give financially?

**Solicit specific feedback for campaign strategies**

What advice would you give to our organization about this campaign?

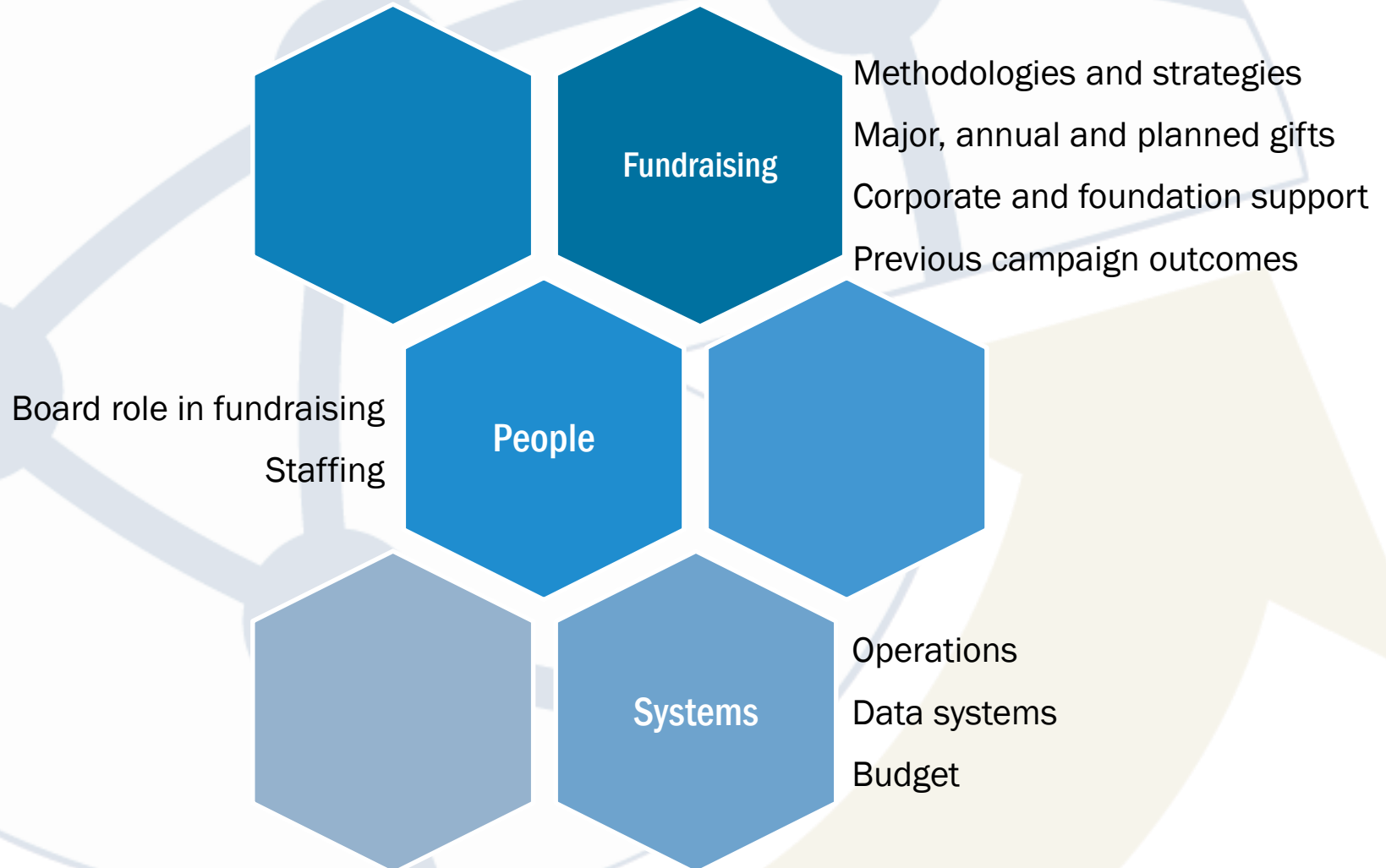
How can we message our goals in a way that is effective and inspirational?

**Giving Patterns of Top Donors**

**Fundraising Trends**

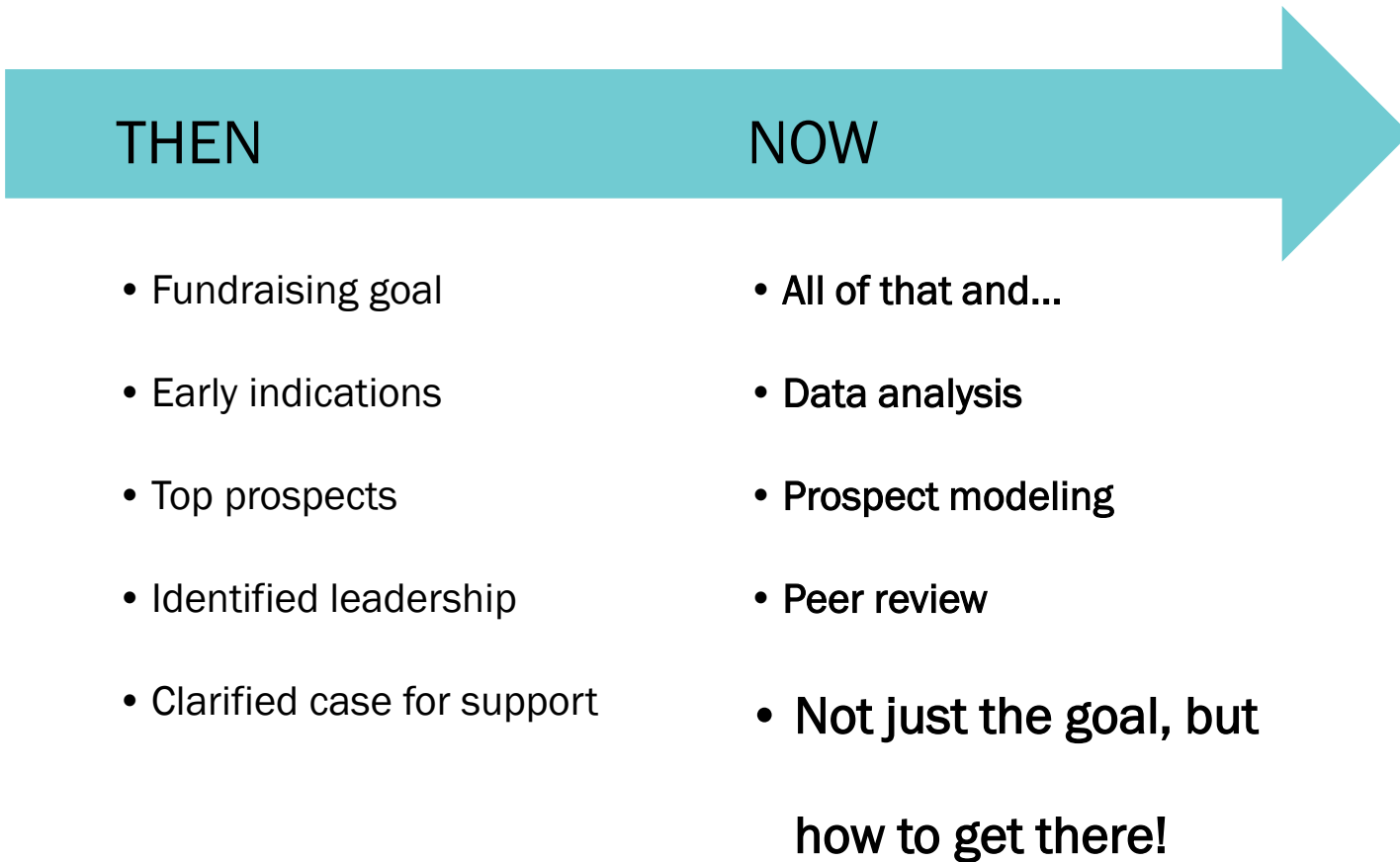
**Wealth Screening  
Implementation and  
Analysis**

**Predictive Modeling**



# **OUTCOMES OF A STUDY**





# What Will a Study Get Us?

## Roadmap and Action Plan

- Timetable
- Budget
- Immediate next steps
- Sequencing of top prospects for the campaign

## Data Analysis

- Understand how donors engage with your organization
- Use data to make good decisions about campaign priorities

## Understanding of Resources Required

- What investment your organization needs to make in order to have a successful campaign

## Elevated Expectations

- Study generates momentum
- Signals to donors that something is to come
- Raises sights for success

## Case for Support

- Soliciting feedback on the case elements is a key way to engage your constituents
- Allows you to identify specific messages for various audiences
- An opportunity to hone your talking points

## Leadership

- Understanding the short list of those that bring credibility to the campaign
- Uncovering new possibilities
- Setting the stage to recruit ideal volunteers

## Prospects

- Board of Directors, staff, major donors
- Members, past donors/members, alumni, volunteers
- Donors with similar interests

## Campaign Plan

- Goal and table of gifts
- Fundraising strategies and outreach plan
- Timetable, including monthly benchmarks
- Training plan for volunteers and staff



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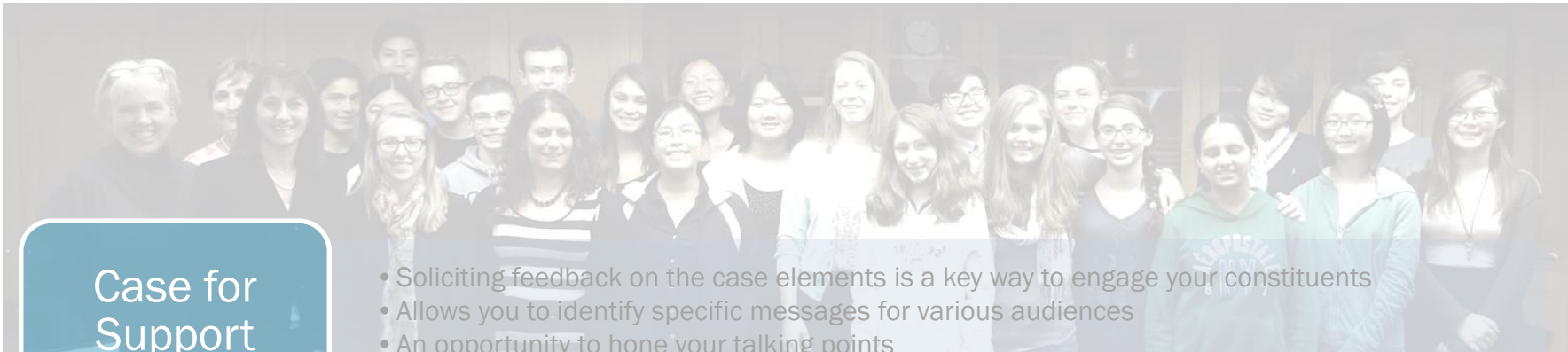
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**Implementation and execution are critical!**



**WHY A CONSULTANT?**

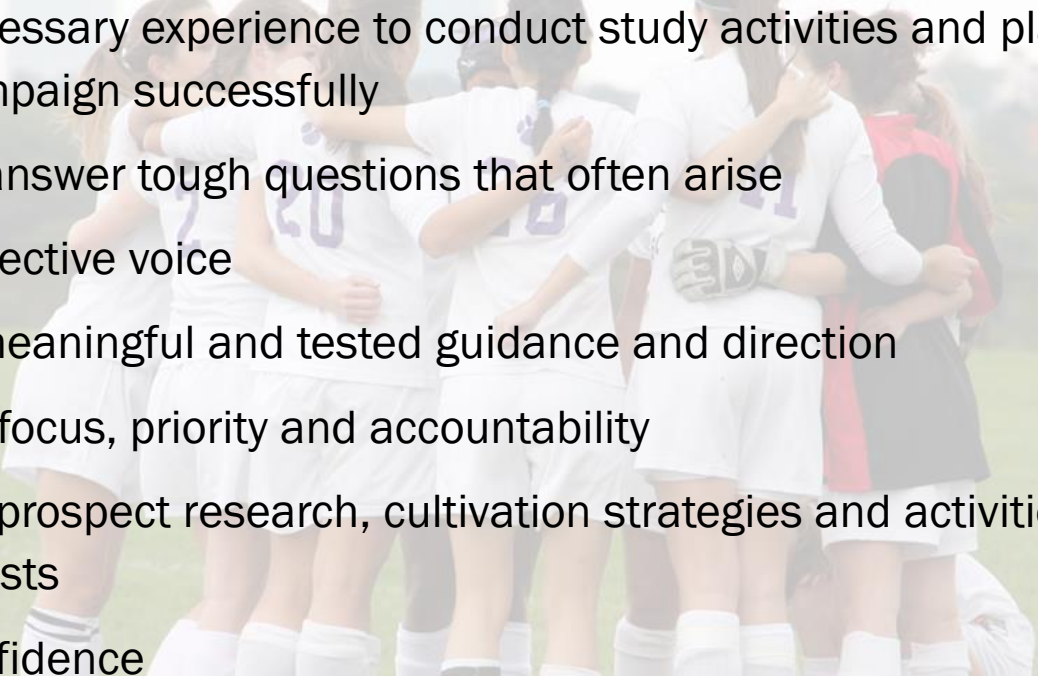


## Have you ever hired a fundraising consultant?

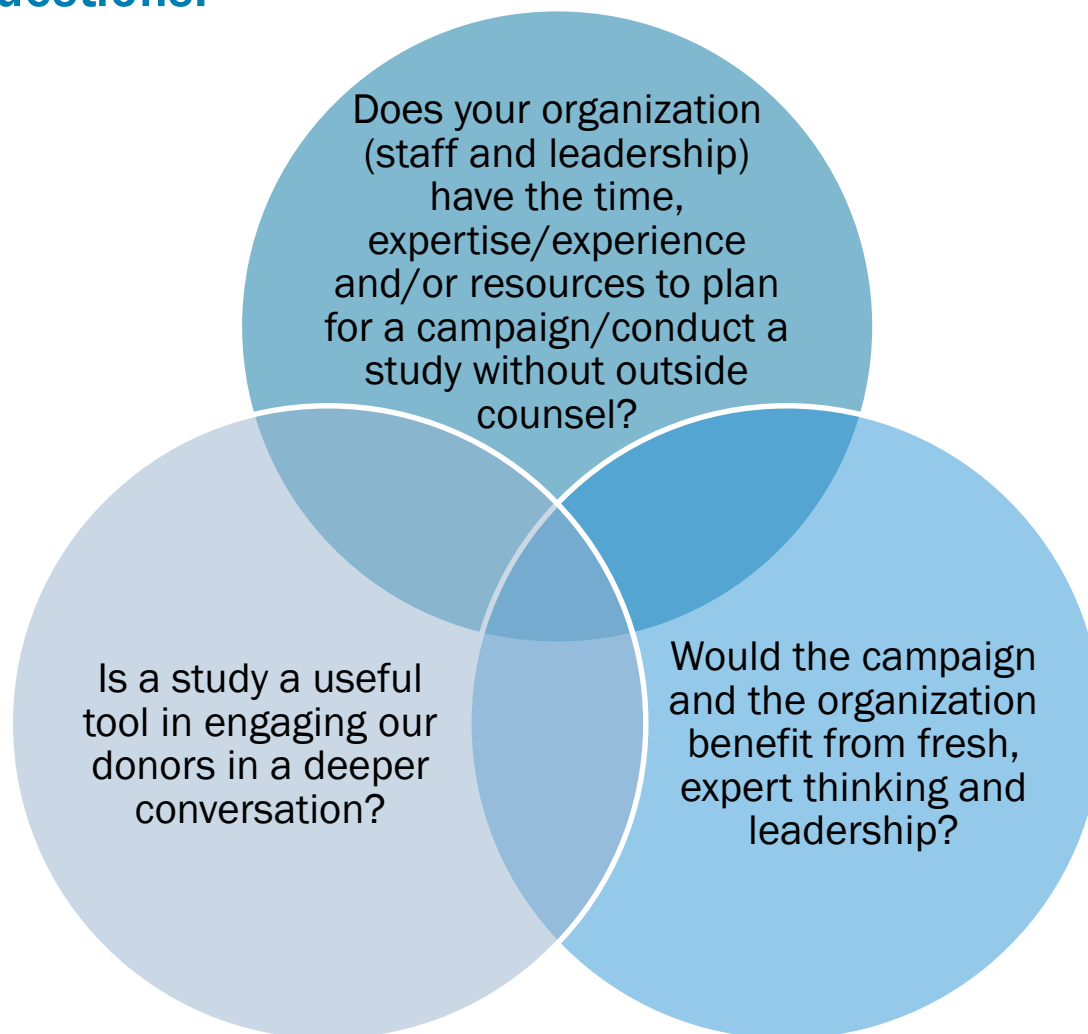
- A. Yes, it was a great experience and I would do it again
- B. Yes, but I didn't find it that helpful
- C. No, but I'd like to!
- D. No, and I'm not very interested.



### A consultant can and should help your organization and study.

- Bring necessary experience to conduct study activities and plan for and/or run a campaign successfully
  - Ask and answer tough questions that often arise
  - Be an objective voice
  - Provide meaningful and tested guidance and direction
  - Maintain focus, priority and accountability
  - Enhance prospect research, cultivation strategies and activities, and major gift requests
  - Build confidence
- 
- A group of soccer players in white uniforms are huddled together on a grassy field. They are wearing white jerseys with purple accents and white shorts. The background is a blurred outdoor setting, likely a soccer field.

## Ask three questions:



## Consultant

- **Benefits**
  - Objectivity
  - Experience
  - Value
- **Things to consider**
  - Perceived expense

## On Your Own

- **Benefits**
  - Least expensive option
  - Allows Major Gift Officers to relay story
- **Things to consider**
  - Resource availability
  - Timing

## Hybrid

- **Benefits**
  - Modeling of best practices
- **Things to consider**
  - Potential confusion regarding roles

**WHEN THINKING ABOUT YOUR STUDY**

More interviews, not fewer.

Be thoughtful of interviewee list. Don't waste time with those you think it would "be nice" to interview – reserve interviews for people with capacity.

Augment outreach with data review, peer review, and prospect research benchmarking.

Deploy organizational resources effectively to maximize outcomes.

Keep everyone in the loop.

Gone are the days of go/no go; it's now “how do we get there?”

A study should reveal precise recommendations on how to resource the campaign – how many people, what tools are needed – it will help an organization determine what is needed to campaign successfully.



**The feasibility study is not dead... Just evolved.**

# QUESTIONS AND DISCUSSION



# Thank You!



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Brian Nevins, Principal and Managing Director, CCS  
bnevins@ccsfundraising.com

Peter Kelly, President, Boston Latin School Association

[www.ccsfundraising.com](http://www.ccsfundraising.com)



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800.223.6733

[info@ccsfundraising.com](mailto:info@ccsfundraising.com)

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