

# The Case for QUESTIONING

Properly implemented, a feasibility study can be useful throughout the fundraising stage of a campaign and beyond.

BY LESLIE MOLLEN AND JOHN BIGGINS

**L**et's face it, a capital campaign is a big step. Many nonprofits have never launched one, yet they know that it's an essential step to growth.

Nonprofit executives often compare their first capital campaigns to taking a corporation "public" — inviting new levels of scrutiny and demanding new levels of productivity in return for higher levels of achievement and prominence. Decades of experience have shown that a campaign feasibility study is the best planning tool for a capital campaign — one that enables a nonprofit of any size to realize the promise of expansion. It creates information that the campaign leadership will use throughout the fundraising drive and beyond.

Yet, even experienced fundraisers will ask why a study is needed. They say they know where the money will come from for a campaign, and that studies take time, cost money and yield predictable results. But experience has shown that a well-designed and executed feasibility study offers an invaluable

opportunity for a nonprofit to reconnect with donors, cultivate new prospects and assess the image of the organization.

The typical study poses simple questions designed to assess the likelihood of a campaign's success, such as the availability of volunteer

## The interview

A good feasibility study interview is more of a discussion than a survey. During a conversation lasting less than one hour, the interviewee can answer some 20 to 25 questions. Consultants display a range of opinions on how many inter-

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leadership, the feasibility of the goal, the image of the organization and the value of the project to the organization's mission. It can assess the interviewees' understanding of the region's economic conditions. Most importantly, it can gather durable intelligence on the contours and nodes of the network of relationships that sustains a nonprofit organization.

views are needed to gain an accurate picture of the attitudes of the donor community; it's dependent on the amount of time available and the resources of the nonprofit. Studies routinely involve 40 to 60 interviews, but some have gone into the hundreds.

A development feasibility study is not a political poll or a marketing study. Because confidentiality >

tain "triggers," becomes constricted, inflamed and lined with excessive amounts of mucus. In essence, what starts as shortness of breath and wheezing can become life-threatening as the airway gets smaller and smaller. "It's like trying to breathe through a tiny straw," she said, "and sometimes the straw can become completely closed. The kid can't breathe, the parents freak out and it gets very serious."

**The Big Idea:** Eureka! I had my "hook." We'd go "outside the box." I'd create a visual analogy in the package, using one of those skinny coffee-stirrer straws.

**The Execution:** On the outer envelope, the teaser was something like "Inside: Take this breathing test." Inside was a card insert with a coffee straw glued to it. It was a lumpy package that would stand out in the mail. The letter told the dramatic story of a serious asthma attack and asked the reader to "try breathing through this straw to see how difficult it is ... imagine the child gasping for air, the family in panic, our medical team coming to the rescue, etc."

The client loved it. Agency staff loved it. I loved it. Maybe a bit too much.

**The Results:** We were so sure this idea was a win-

ner, I'm not even certain if we mailed it against an established control to mitigate our risk. How could people *not* respond to it? Could there be a more dramatic, visceral way to simulate an asthma attack?

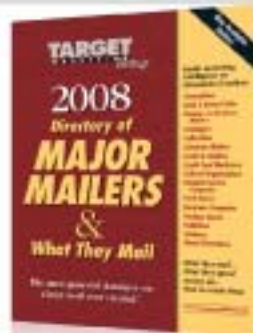
Apparently, yes. The package bombed. We had a heck of a time sourcing the straws and finding a vendor that could affix them, and it became expensive.

**Why It Bombed:** The teaser didn't really demand attention or tie in with a key benefit. You really had to read the whole story to see how the straw related to what the client did. It didn't focus enough on the core offer — the uniqueness of its world-class research and medical treatment. It was all sizzle and no steak.

**Important Fundraising Lesson Learned:** When everybody loves the package, it's probably going to fail. Never go "outside the box" without first testing a small cell, and make sure an established winner carries the fundraising load. Take calculated risks. Think through all the production headaches your concept could cause.

But of course, don't stop pushing the limits. You have to learn from your mistakes. And if you never bomb, you're probably not pushing hard enough. **FS**

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is at the heart of the process, a feasibility study will not succeed in a focus group. It is not broad-based. It does not endeavor to extract consensus from a large group. Rather, it seeks to solicit the frank opinions of those few participants whose influence and affluence can ensure the campaign's success. If done well, a feasibility study is a superb donor-cultivation tool.

Because the study doesn't need to interview all possible prospects, it must identify and interview the right prospects. One of the most productive and reliable ways to identify them is by convening a knowledgeable volunteer committee that understands the intricacies of the organization's philanthropic network. Board members and development staff often have reliable insights into who would be the best members of this volunteer committee. The committee can use its stature to help persuade potential interviewees to participate in the study.

One of the most important responsibilities of this volunteer group is to guide the creation of the summary statement, a short document outlining the purpose of the campaign. This brief overview often is distributed to study participants prior to the interview. Working closely with the organization's development staff, the committee ensures that the concepts of the campaign are sound and that the funds from the campaign will advance the organization's mission in a definitive way.

### The summary statement

A feasibility study is intended to assess the donor community's views about a specific campaign to realize a capital project, a building, an endowment or a professorship. The organization must invest all the effort necessary to ensure that

this particular capital project is the right way to advance the organization. The study process assumes that the organization is asking its donor community to evaluate a project and a campaign that is the most important to the organization's future, one in which the organization already has invested great effort.

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### Five Things to Know About Feasibility Studies

- 1 Condense the reasons for the campaign and the project it will support to one sentence.
- 2 Exploit every cultivation opportunity the study presents; talk to those who know the organization and those who don't, but should.
- 3 Use fundraising counsel to conduct the study to ensure that interviewees are frank and forthcoming in expressing their views.
- 4 Take the time necessary to retain fundraising counsel that the leadership of the organization can trust and work with successfully.
- 5 Listen to the results of the study, and make every effort to address issues raised by the interviewees.

institution. The study should generate answers, not fuel conversation or dissension. Interviewees are going to ask why the organization is doing a campaign, and why a certain set of projects is important. The organization must have concise answers to those questions.

The organization has to be prepared to show why the campaign is the crucial next step for its growth. All of this prior work and review should be evident in the summary statement. The organization should invest as much time in

the drafting of its summary statement as it would the campaign's full case. As the campaign's first public statement, it must bear the weight of public scrutiny.

### The role of counsel

Fundraising counsel stands in the center of the study process. A consultant can serve as both guide and catalyst during the early phases of the study and quicken the work of the volunteer committee. Because the success of the study requires the candor of the participants, the study interviews should be conducted by an impartial, confidential third party. Participants then can speak frankly about the organization, the project and prospects for the campaign. Their candid opinions are truly the substance of the study.

Experience has shown that prospects are less open and direct if they are speaking with the organization's development officers or administrators with whom they have worked for years. No participant wants to damage a productive relationship with the organization's fundraiser or president. Thus, important insights and comments are lost.

Often, consulting firms quote a fixed price for a study that includes consulting and interview time, writing assistance, questionnaire design, tabulations and analysis, and presentation of the study's findings. Many firms bill separately for travel and other expenses. The study's expense is very modest when compared to the campaign goal and nagging costs of a failed campaign. An organization is always well-advised to talk to several consulting firms to establish which fits best with staff and leadership, and which produces studies of the highest quality and integrity. **FS**