



TO ENSURE A CAMPAIGN

Rome was in an uproar. Julius Caesar paraded through the streets after defeating his rival Pompeii. As Caesar passed, a soothsayer called out: *Beware the Ides of March.*

But, Caesar ignored the warning. The signs were everywhere, but they were overlooked.

A plot was hatched and on the Ides of March, the conspirators attacked. As Caesar addressed the multitudes, he was stabbed repeatedly. Finally, Brutus thrust his dagger into his friend's side. Caesar then uttered the famous phrase, *Et tu Brute?*

In retrospect, Caesar likely should have said: *Why didn't I conduct a feasibility study?* It is, after all, an excellent predictor of the future. (Well . . . this might be a bit of a stretch to make the transition to what a feasibility study is all about!)

The feasibility study is one of the key elements of pre-campaign planning and a precursor to a successful campaign. The specific objectives of the feasibility study are:

1. The feasibility study tests the strength of the case for support. Does leadership feel the program meets valid needs? Is there dramatic and emotional appeal, sufficiently so to merit and win financial support?



2. The feasibility study examines the economic and giving climate. It looks for other campaigns that might have a negative impact on your plans.
3. Is leadership willing to accept major roles in a campaign. Do volunteer boards, individually and collectively, possess the influence to bring about success? Will your constituents follow your present leadership into a campaign?
4. What type of financial support can be expected for your campaign program? Who are the potential sources for major gifts and at what level can you anticipate participation?
5. What should be the proper timing and strategy for a campaign? What should be the schedule for the campaign.
6. The validity of the feasibility study hinges on the quality of the universe of men and women who are interviewed. Proper analysis requires individuals of prominence, stature, and affluence. The single operative criterion is to involve men and women who can make or influence large gifts. To help with the identification of leaders:
 1. Ask each board member to nominate and interview candidates;
 2. Assemble a selection committee outside the board of those who can be especially helpful in the identification process—trust officers, prominent attorneys, CPAs and so forth; and



3. Assign the names of potential interviewees to one of three classifications:

- Those who must be interviewed
- Those who should be interviewed
- Those who could be interviewed if there is extra time

Another critical element in the study is the development of a preliminary case for support. This vision strategy explores the need for the program and a campaign. Further, the Case document also provides an abbreviated background of institutional history and mission. The Case is presented to each leader prior to the interview.

Jerold Panas, Linzy & Partners provides a supporting document to help you prepare for the study. They include the *Prospect Evaluation Grid (PEG)*, sample letters, nominating forms, and more. You may wish to see our Manual for preparing for a study. All of our material is available on our website.

The feasibility study brings together every group of your organization, e.g., management, board members, employees, donors and other stakeholders. The planning affords the opportunity to vision the future. To bring about action that leads to change. Change that makes a difference to all you serve.

Jerry A. Linzy is Senior Managing Partner of Jerold Panas, Linzy & Partners—the nation’s premier firm in the field of fundraising counsel, campaigns, and philanthropic activity.