



## **Chapter Assessment, Campaign Readiness & Feasibility Study**

- Whether you hire a professional or complete an internal chapter assessment, it is very important that you take the time to answer questions similar to those listed in this link:

[http://www.fmg Tucson.com/chapter\\_assessment.html](http://www.fmg Tucson.com/chapter_assessment.html)

- A Campaign Readiness Assessment and/or Feasibility Study focuses on how money can be raised, if your board is prepared to move forward, and if there is interest within your alumni & parents to support your case.
- The Campaign Readiness Assessment looks at the following: strength of the case statement & other materials; evaluates the capability of the board to take on this project; determines the commitment of the board & possible campaign leadership; identifies major donors, campaign leaders & volunteers; determines the perception of the need for the proposed fundraising; determines the best timing for the campaign; and helps establish a campaign goal.
- A Campaign Readiness Assessment and/or Feasibility Study can be managed by volunteers but more often than not, the skill set and/or time commitment is not at the level needed. If you hired a professional, you could expect to spend from \$7,500 to \$20,000 in fees & reimbursements depending on the firm hired and the services contracted for.
- The steps FMG recommends for a chapter considering a major campaign:
  - Online chapter strategic assessment completed.
  - All materials needed for this process are reviewed and/or developed (case statement, study section of the website, alumni/parent/undergraduate surveys in print & online version, pledge form, etc. The case statement must present a compelling narrative of your history, mission, programs and rationale for the proposed campaign.
  - Records are updated as needed for alumni, parents & undergraduates as well as prospect research completed on those with affluence or influence.
  - Alumni/Parent relations program in place.
  - In-person survey meetings and/or phone surveys with all board members, 3-5 students, 3-5 parents, and 15-25 additional alumni. These meetings will involve completing surveys as well as rating of other prospects.
  - An interest/involvement survey for alumni and parents to be completed online and by mail. This survey will address any fundraising but focus on contact information as well as interests.
  - Based on results to date a more detailed feasibility study is completed: cultivation/focus group events in the top 3-4 markets, in-person surveys will another 10-25 alumni & parents, phone surveys with 50-200 alumni & parents, online & mail surveys to remaining alumni & parents as needed. Each phase is 90% completed before you move to the next phase.
  - Survey questions focus on contact information, interests, willingness to contribute, willingness to volunteer, and their recommendations on other prospects.
  - This process can take as little as 90-days to as much as 7-9 months.