

The Planning & Implementation Study

WHY CONDUCT A STUDY?

As conducted by KMA Consultants Inc., a planning and implementation study is an important part of preparation for a successful campaign. It provides crucial insight into the likelihood of success as well as a number of additional benefits that facilitate reaching the goal. Further, consultation with constituents during a study significantly enhances development of the Case for Support.

RESEARCH THAT LEADS TO A PLAN

In capital fundraising it has been standard practice to conduct what was referred to as a "feasibility study" prior to the launch of a campaign. The terminology arose because decisions were being made about whether or not to proceed with a project or a campaign, and because the size of the financial need or goal was yet to be settled.

Today the questions about potential are still paramount. An organization should have some sense of the degree to which it is likely to be successful prior to launch of a campaign, in order to avoid damaging outcomes ranging from institutional embarrassment and administrative inconvenience to failed projects and financial crises.

KMA's clients, however, have found it very beneficial to engage in a "Planning and Implementation Study" which not only assesses potential (i.e. is the project feasible?), but also lays out a plan and implementation strategy for the campaign itself. Thus the assessment of potential does not stand alone but is presented in the context of a customized campaign plan. For example, an organization must answer specific questions regarding leadership potential, the relative merits of the various components of the project to be funded as well as the strategic and tactical issues related to implementation. Only by consulting representative constituents can the organization be certain it has the best insight.

Further, by consulting the constituency, the study produces insight that is valuable for case development, such as constituency perceptions of the organization, or possible objections to be anticipated and answered in Campaign literature.



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The study also:

- Cultivates key stakeholders and prospects, in that they usually respond positively to being consulted in the early stages of such an effort;
- Creates an opportunity for an independent third party to hear a candid assessment of aspects of the organization from important constituents, allowing the leadership to take those views into account in its communications and other campaign planning;
- Provides advance intelligence on such matters as volunteer leadership and cornerstone gifts;
- Earns respect from donors who see the organization performing due diligence prior to a major undertaking;
- Tests the possibilities for widening the donor base.

KMA Consultants Inc. highly recommends the study process as part of an organization's due diligence and its best option for campaign preparation.

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