

Planning Study

The Compass Group planning study is an in-depth examination of the elements that are necessary to conduct a successful campaign. This examination involves conducting personal and confidential interviews with a select group of individuals—identified by the client—who have the potential to significantly influence campaign success through their contribution or their volunteer leadership. In the context of the following four Predictive Indicators for Success data is collected, analyzed, and reported in a manner that facilitates informed decision making regarding the future of a successful campaign.

AN URGENT AND COMPELLING CASE FOR SUPPORT: To motivate constituents to make the number and size of contributions necessary to meet a significant campaign goal an organization must articulate a sound reason for raising money— must present a sound reason for raising money—based on their vision and mission—and a timeframe for raising money—based on addressing a critical need and/or maximizing a unique opportunity. During the planning study this Statement of Need provides the opportunity to explore the funding potential of the proposed campaign. It will also serve as a precursor to the development of a comprehensive Case for Support.

CULTIVATED PHILANTHROPIC POTENTIAL: Campaign success will be dependent on securing contributions of specified amounts in the right proportion in relation to an established goal. One of the goals of the planning study is to “test” the feasibility of successfully achieving a proposed campaign goal. During this test the goal is presented in a giving model based on the results of similar successful campaigns. This test will provide the information necessary to establish a challenging but achievable campaign goal and develop a specific giving model. These tools will serve as a road map to “winning the campaign on paper.”

DEDICATED AND COMMITTED LEADERSHIP: In most cases, the available dollars for a successful campaign are present within an organization’s constituency. The key to success, however, is getting personal access to those individuals who can make the decisions on how much to invest in the organization’s future. Through the Planning Study process Compass will evaluate the willingness and readiness of volunteers to turn their “good intentions” into meaningful actions in the context of a campaign. Compass is committed to the use of volunteer relationships in successful solicitations. Your volunteers must make this campaign a priority – regardless of other obligations.

STRATEGIC RESOURCE INVESTMENT: Adequate internal resources are necessary to conduct a successful campaign over and above the on-going development work being conducted. Separate resources must be allocated to and a budget must be developed for the campaign to ensure successful implementation. The planning study will include an exploration of the availability of resources to support a significant campaign.

Effective implementation of the Planning Study will provide the answer to many questions including:

- How do your donors feel about your organization?
- Is your case for support urgent, compelling and marketable?
- Does your constituency have confidence in the organization and its goals and objectives?
- Will your donors give to you in support of the objectives stated in your case?
- Are there volunteers available to help you raise the money you need?
- Can you generate the funding you need within a reasonable timeline?
- Are there any internal or external issues that will negatively affect your campaign?