

CALIFORNIA-NEVADA UNITED METHODIST FOUNDATION

Feasibility Study

The Feasibility Study has two phases: *preparation* for acquiring the information and actually gathering the information through an *interview process*. Preparation for the study involves determining a purpose, developing a case statement and developing a list of interviewees. Let's examine each step in the preparation for the study and then examine the interview process.

Preparation for Feasibility Study

- **Purpose:** The Purpose of a feasibility study is to determine whether First UMC has the specific potential and leadership to raise specified levels of support over an identified time frame. It is important that the representatives of the church's constituency selected to participate in this study are especially relevant to both the organization and the project/program under consideration.
- **Case Statement:** For purposes of the study, a two-page statement written to acquaint the interviewee with background on the organization, its future directions, and its aspirations for private support. It will be sent to those who have agreed to participate in the study and will be used by the interviewer in the individual meetings. Therefore, it must be concise, well thought out, and admittedly, a summary of the major issues facing the church in both program and finances.

An outline of points to be addressed in the statement should include:

- **Background of (Name) United Methodist Church of (Town)**
 1. Date of founding
 2. Mission
 3. Significant accomplishments
 4. Key leadership (present and past) associated with the church and its mission
- **Future**
 1. Directions or plans
 2. Process to determine these goals
- **Funding:** What is the current level of support, including endowment (total principal and annual income)? What are the estimates or goals for increased support to realize the goals described above? From what sources might these gifts come? In what amounts? Toward what ends? Over what period of time? Are special programs envisioned to raise these funds (campaign, leadership event, other fund raising events, etc.)

(A chart of standards must be developed to illustrate the level of support needed and the numbers of gifts within specific ranges required to realize this goal- see sample)

- **Summary:** The case statement should answer the following three questions:
 1. Why is (Name) United Methodist Church of (Town) important?
 2. How does it serve and whom does it serve?
 3. Why does it deserve support?

The final statement should be no more than two typewritten pages. One who can best articulate the need in a simple and concise manner should draft it. The consultant hired to conduct the study should have final approval of the statement.

Interview Process

- **List of Prospective Interviewees:** The consultant hired to conduct the study must meet with a good cross section of those whose leadership and support would be considered critical to the success of the Capital Campaign. Attached is a suggested letter to be sent to leadership and significant donors in the church to seek their suggestions for potential interviewees. Other names can be gathered from:
 1. Membership Lists

2. Financial Records
 3. Others whose activities or interests complement the church.
- **Selection Process:** Once all names have been gathered, they should be ranked as follows:
 1. *Must* be interviewed
 2. *Should* be interviewed
 3. *Could* be interviewed

The list should be larger than the proposed scope of the study in order to allow for those individuals who will decline to participate. The majority of the names should be in the *Must* and *Should* category.

Process for determining Feasibility Study

- **Interviews:** To make an educated guess about what the goal should be, information is needed. You must know whether members will be interested in the needs. Will members support a campaign at levels of three to ten times (or more) their regular giving?

The best way to get this information is to **ASK**. Select about fifteen to twenty people, among them major donors, church leaders, and staff. Be sure to include those whom you guess might be the campaign's top ten donors. Some guidelines to follow are:

- **See people individually.** Resist temptation to call a group together. That doesn't work. People are reluctant to speak their minds in a group.
- **Team visits are okay.** It is also appropriate to delegate these visits to other members of the campaign steering committee.
- **Call in advance to arrange the visit.** Explain that the church is considering a capital campaign and that you would like to discuss some of the needs and plans. People enjoy being consulted. When the campaign begins, they will not feel left out.
- **Don't be shy.** You are not selling anything or asking for money. At this point, what you want is information and advice.

Some questions to ask are:

- Do you think these are appropriate needs for our church campaign? (Be aware of what their reaction is to the needs. Enthusiastic, apathetic, not interested?)
- Which needs on the list do you think are most worthy of support? Are there any you feel the members will not be interested in?
- Which of the needs do you personally feel are most important?
- Do you think that the suggested goal is achievable? Is it too low, too high, just right? What do you think would have to happen for the church to achieve such a goal? What would you recommend as a goal?
- Do you feel there would be sufficient leadership gifts from among our membership to reach this goal? In most campaigns, the top donor gives between 10 and 25% of the goal. Do you think such a person exists among our membership?
- Who are some members that you think would be potential volunteer leaders for the campaign?

Remember the purposes of the interviews:

- To gain information about the feasibility of a campaign. Is there sufficient interest?
- To gauge reactions to a suggested goal.
- To learn about the interviewed member's personal interest. Which parts of the campaign might they support? What is the level of the enthusiasm? This information may be useful later during the evaluation of potential donors.
- To discover whether the interviewed member might become a potential leader in the campaign.
- To raise awareness about the coming campaign.

- To help significant members feel that they have a part in this major decision in the church's life.

Immediately after the interview, make notes (for example use 3"x 5" cards, one per interview with name, address, and telephone already printed on card). You will uncover a wealth of facts and feelings that can be easily forgotten or confused. Later, when you have completed the interviews, it is important to make a summary of your findings to be used in determining the actual campaign goal.

When the Feasibility Study is complete you are ready to secure approval.

- **Securing Approval:** There is value in calling a special all-church charge conference and vote to do a campaign. A special meeting provides an opportunity for all to speak their mind and increase the involvement of many people.
- **Set the Goal:** Once you have identified the church's needs, discussed the campaign with the key people, estimated what amount is feasible to raise, and voted to conduct the campaign, you are ready to set the goal. Some goals are established at the time of the church vote. Other goals are delayed until some initial leadership gifts are pledged.

Establish a goal based on a balance of the needs and the feasibility. If the goal is too high, the possibility for failure and discouragement is great. If it is too low, you will have lost an opportunity. The goal should be achievable, but represent a challenge.