



EmbarkSM Feasibility Studies

The most important step in preparing for a capital campaign is to conduct a thorough, objective and highly targeted marketing research study. Embark feasibility studies are just that, and in addition reveal the attitudes of your key constituents toward their potential level of support for a large-scale fundraising initiative. A proper analysis gives you the opportunity to set appropriate campaign goals, customize campaign objectives, determine proper solicitation strategies and appeal more effectively to major gift prospects.

Goals

You can expect to learn specific answers to the following questions:

- Is your chapter deemed worthy of support by the potential giving constituency?
- Is your case for support strong, understood and endorsed?
- Do your constituents place a reasonably high priority on the project, and are they receptive to a campaign?
- Can you raise the dollar goal being “tested?” How much money can you raise?
- Is the availability of gifts consistent with the goal?
- Are there sufficient volunteers to form a strong nucleus of your campaign organization?
- Will a sufficient number of key individuals support a campaign by contributing significantly and by accepting critical leadership roles?
- Is the timing of the campaign good?

Methodology

- Electronically analyze all constituent records using OmegaFi’s Affluence Estimator (see below)
- Conduct a ratings evaluation exercise with key alumni leaders
- Develop the pre-case statement and refine the case for support
- Personally interview 35 – 45 of your most affluent and influential alumni; (*phone interviews are conducted only as a last resort, and at the specific request of the prospect.*)
- Survey another 200 – 300 alumni by mail and email
- Completed within 90 days once interviews begin

Affluence Estimator Analysis

During your feasibility study, OmegaFi will use this multi-level electronic screening process to compare your records with the following:

- Acxiom Household Profiles
- Dun & Bradstreet State Business Registrations
- FAA Civil Aviation Registry of Aircrafts
- Federal Election Commission
- Foundation Trustees
- GuideStar
- Hoover’s Business Information
- JGA Charitable Donations
- Marquis Who’s Who Biographies
- Philanthropic Donors
- Reuters Market Guide
- Section 527 Directors
- Section 527 Political Donations
- Social Security Administration
- LexisNexis Real Estate
- State Boat Registrations
- State Political Donations
- Thomson Financial SEC Stock Information
- U.S. Coast Guard Marine Safety and Merchant Vessels
- U.S. Federal Aviation Administration



Outcomes

At the conclusion of the study, OmegaFi will draw upon its findings to prepare a final report and recommend:

- Whether a capital campaign will have a reasonable probability of success
- The case “themes” and projects most likely to inspire donors to contribute to a campaign
- A realistic and specific monetary goal
- Whether there are sufficient alumni candidates to make gifts at specific levels (\$10,000 and above)
- Whether alumni/ae have or are willing to make an outright, pledged or planned gift by making your organization the beneficiary of their will or estate plan
- The top 25% of your constituencies with the greatest capacity and inclination to make a gift to your proposed capital campaign
- Policies the alumni/ae leadership should review and adopt before beginning a capital campaign, for example:
 - » giving level amounts and names
 - » room naming policies
 - » incorporating engraved bricks as a component
 - » use of a national or university 501(c)(3)
 - » tax deductibility
- A realistic timeframe for implementing a campaign
- Individuals to serve as leaders and volunteers in a campaign
- The volunteer organization and implementation plan needed to succeed
- Challenges to address and overcome

Program Terms

- Half of fees are billed at contract signing
- One quarter are billed when interviews begin
- Final payment is due when results are presented
- Expenses are billed monthly
- EmbarkSM Alumni Relations conversion, licensing and monthly fees are waived during an EmbarkSM study