



The following document is a sample from a real campaign directed by Capital Quest. Permission is hereby granted for printing this document for the limited purpose of education and training of board members and community/campaign leaders. It is copyrighted material.

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**Capital Quest, Inc.
Consultants Serving Philanthropy Nationally Since 1992**

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	Yes	Possibly	No
Volunteer			
Leadership			
Personal Gift			
Range→			
Corporate Gift			
Range→			

Name _____
 Title _____
 Company _____
 Overall Responsibilities:

Date _____
 Time _____
 Address _____

1. Background information (how long in community, client role, length with client, job, other NPO associations).

2. How do you think the community, particularly community leaders, perceive CRMC? Quality of care, staff – involvement in the community. Taken for Granted?

3. Any high profile negatives that you think might get in the way of fundraising? Obstacles to a successful campaign?

4. Rate each of the following areas:

Facility	1	2	3	4	5	6	7	8	9	10
Employees	1	2	3	4	5	6	7	8	9	10
Reputation	1	2	3	4	5	6	7	8	9	10
Medical Staff	1	2	3	4	5	6	7	8	9	10
Quality-Care	1	2	3	4	5	6	7	8	9	10
Corp. Citiz.	1	2	3	4	5	6	7	8	9	10

5. Best and Worst we're going to hear?

6. How would you describe the ownership/management structure of CRMC?

- _____ County Hospital (Positive)
- _____ County Hospital (Negative)
- _____ Tax-Supported
- _____ Non-Profit Public Benefit Charity
- _____ Business/Corporation

7. Community awareness of non-profit, 501 (c) (3) status?

Yes or No

8. Community Awareness of ?

- Operating Budget
- Operating Margin
- \$12 million in charity care?
- \$400,000 in tax revenue – for \$12 million in charity care.

8. Community Awareness of ?

- 1,000+ jobs and total payroll of \$34.5 million
 - Economic Impact of \$150 million+
 - Openness – annual report and newspaper reporting?
-

9. “A Local Hospital” – reaction to market share information.

10. Overall Impression of Building Plans? Needed? Most Important Selling Point to the community?
Anything missing? Anything that is a “Waste of Money”?

11. With one-minute to explain why someone should give to this campaign, what would you tell them?

11. Costs and Revenues

- Does reality justify a capital campaign?
- Other sources of funding or is campaign the only way?

UNANSWERED QUESTIONS ABOUT PLANS, COSTS, OR REVENUES?

12. Quality of Hospital Board and Foundation Board?

13. If you were fundraising chair, what 4 or 5 people would you have serve on your committee?

1.

2.

3.

4.

13. (Review gift chart). Wealth/Philanthropic Wealth?

14. Who would you see giving the lead gifts? Can you think of four or five people who might have the capability of giving high five, six or even seven figure gifts?

1.

2.

3.

4.

5.

15. Would you be financially supportive? At what level do you think you might consider?

16. Explain role of Steering Committee. Would you consider being a part of the campaign from a leadership standpoint? Would you be willing to:

- Call people you know and set up a meeting to share the details of the project/campaign, knowing that you'd also go with someone who will actually ask them for a gift?
- Be willing to ask friends/associates, etc. for a financial gift?

17. Effect on naming areas of hospital/Emergency Dept. on giving?

Significant

Moderate

Minimal

18. Capital Campaign/Fundraising Competition?

19. On a scale of one to ten, rate the chances of success? If less than "8", what goal is "absolutely feasible"? If "8 – 10", what goal is highest possible you'd rate as "reasonably achievable"?

\$5,000,000	1	2	3	4	5	6	7	8	9	10
\$3,000,000	1	2	3	4	5	6	7	8	9	10

19. Do you have any other comments you would like to have included in the campaign recommendations and plan?
