

Campaign Planning Study

City of Waukesha Parks, Recreation & Forestry Department

The purpose of the campaign planning study is to determine the:

- Support for the project concept and its cost
- Receptiveness of the community to fund the pool through a capital campaign
- Willingness of the community's leadership and volunteers to work on the campaign
- Local fundraising climate
- Issues relating to the project
- Campaign's goal, design, professional fees and expenses

Campaign planning study timeframe and professional fee: 8 weeks to complete

- **Preparation: four weeks:** case development, interviewee selection meeting, scheduler orientation and contacting designated people for interviews
- **Conducting the interviews:** We would establish a goal of conducting **50 interviews over seven professional days within two consecutive weeks.** We would estimate conducting about 8 interviews per day with people representing: finance, industry, local foundations, community leaders, donors of significant giving ability, opinion leaders, snowbirds and members of the Foundation, Friends and Parks, Recreation & Forestry boards. In any study there is the need to address cancellations, additions, and re-scheduling. The client study coordinator should be available throughout the interview phase to receive any calls about changing, cancelling or rescheduling an interview. Also, notify the study director of these changes, as appropriate.
- **Production of the findings report: Two weeks** to compile the statistics, download the comments, determine conclusions, make campaign recommendations, produce the proposal for campaign service and write the campaign contract.
- **W&K recommendations to conduct the study:** Based upon our meeting, we feel that learning sooner rather than later about the mood and climate for a campaign to fund the pool project is important for planning purposes. In addition, asking community leaders about their preference of a solution after presenting them with the options creates buy-in and transparency. Conducting interviews as soon as possible with "snowbirds" is also important to capture their feedback. The study findings can also be used to justify public support which is important when city government officials need to weigh their support for the project.

The outcome of a campaign planning study is:

- A written and oral report with a statistical compilation of the questionnaire responses and selected anonymous interviewee comments, conclusions and recommendations
- Identifying the campaign's design, goal, length, professional fees and expenses
- Recommendations for a public relations strategy
- Presentation of the findings and a separate proposal and contract for campaign service

Terms of service for a campaign planning study:

- Campaign planning study is one agreement
- Consists of conducting 50 interviews conducted over seven days within two consecutive weeks
- Professional fee of \$13,500, plus travel, lodging and meals, expenses not to exceed \$1,500
- Completion time of 8 weeks to prepare, conduct interviews and produce the findings report
- Proposal for campaign service and contract is presented with the study findings report

Terms of campaign service:

- Fees and expenses are presented in contractual form and any deviation must receive express client approval
- Money is raised on a fee for service basis and never on a percentage basis
- Fee remains the same regardless if the campaign falls short of or exceeds the goal
- There are no guarantees
- Client pledges to give the campaign their utmost support
- Contract can be terminated at any time with thirty days written notice by either party

Why Woodburn & Kyle, LLC

- Previous aquatic center/pool experience
- Successful campaign for Veterans Memorial Aquatic Center – Hartford, Wisconsin
- Abides by the ethics of all nationally recognized fundraising organizations
- Forty-two years of experience, especially in Wisconsin
- Partners with Visuality, Inc. for about 15 years, a media production company for videos based in Madison, Wisconsin

Deliverables: A Campaign Planning Study will provide:

- Orientation: Meeting to review the *Client Guide to Conducting a Campaign Planning Study* with the client study coordinator to review study activities such as scheduling interviewees, completing electronic forms, enlisting individuals for the interviewee selection meeting, identifying a place to conduct interviews, viewing plans for presentation to interviewees and arranging refreshments. The study director should also tour the facility and have time to ask questions.
- Interviews: The Study Director will attempt to complete 50 confidential interviews in-person and/or up to five over-the-telephone where key individuals are not available during the designated visit.
- Findings Report: Presented in oral and written form, it provides a statistical analysis of responses to the questionnaire, observations, conclusions and recommendations. It is accompanied by a proposal for campaign service or continued service to strengthen the organization's preparation to launch a campaign, as appropriate.
- Goal: A amount that is probable.

- Campaign Design: The identification of a campaign's scope and strategy to reach specified donor groups and accompanying gift division categories where activities are scheduled in specific timeframes.
- Leadership: Assessment of the receptiveness and probability that key leadership will become involved with your campaign.
- Public Relations Strategy: Delivering the campaign's message and visual representations to leadership, donors and the public through meetings and print, electronic and social media.
- Professional Fees and Expenses: A listing of these items and their costs presented in contractual form.
- Client is responsible for travel, lodging and meals for the orientation meeting, onsite interview period, and for the onsite presentation of the findings report.

Professional Fee for Service: Woodburn & Kyle LLC will charge \$13,500 plus expenses not to exceed \$1,500 for the above campaign planning study and its deliverables as described above. We request payment on the following schedule:

- \$7,500 upon signing this letter of agreement
- \$3,000 upon beginning the onsite interviews at a date to be determined
- \$3,000 balance upon the presentation of the findings report
- Expenses shall be reimbursed upon receiving receipts at the study's conclusion

This Agreement is executed as of the _____ day of _____, 2018.

COUNSELORS

Woodburn & Kyle LLC

Madison, Indiana

By: _____

Authorized Signature

Title: _____

Wayne R. Kyle

Vice-President

CLIENT

City of Waukesha Parks,

Recreation & Forestry

Waukesha, Wisconsin

By: _____

Authorized Signature

Title: _____

Ron Grall, Director

City of Waukesha Parks

Recreation & Forestry