



## ScaledRight Selection Tool<sup>SM</sup>

for use with Capital Campaign Feasibility Studies and Capital Campaign Implementation

### Capital Campaign Feasibility Studies

(Up to \$10 Million Community / Established-Organization Projects)

Option	Investment Range	Comments
<b>Feasibility Study Toolkit and / or Coach</b>	Factors include: <ul style="list-style-type: none"> <li>• Organization Capacity</li> <li>• Leadership</li> <li>• Research needed</li> <li>• Staff and Board experience</li> <li>• Desired schedule strategy/complexity</li> <li>• Breadth, depth and affinity of prospective donors</li> <li>• Other factors specific to the project, community and/or institution</li> </ul>	<ul style="list-style-type: none"> <li>• Consultant serves as a coach; client performs most activities</li> <li>• Minimum investment in external resources</li> <li>• Potential donors are more candid where confidentiality is offered (requires external interviewer such as TPG). If this is concern, this option not preferred.</li> <li>• Priced as single-use license for Toolkit</li> </ul>
<b>Philanthropic Market Assessment</b>	See above	<ul style="list-style-type: none"> <li>• “Snapshot” in time of the philanthropic marketplace relative to the client’s project</li> <li>• Low investment in external resources</li> <li>• Good if “trial balloon” approach is merited</li> <li>• Quickly and inexpensively identifies potential issues, obstacles and strategy options, and strategic activities to be undertaken.</li> <li>• Not generally developmental</li> </ul>
<b>Typical Feasibility Study</b>	See above	<ul style="list-style-type: none"> <li>• Consultant leads and implements the feasibility study including some client resources</li> <li>• Consultant spends more time on-site; improves communication, knowledge transfer, and effectiveness</li> <li>• Results in stronger / broader leadership consensus and strengthens overall commitments. This significantly improves the organization’s success with the campaign and the project</li> <li>• Relatively less staff and volunteer time</li> <li>• Risk factors, obstacles, options and opportunities are identified and addressed sooner</li> <li>• Better overall value for investment in external resources</li> <li>• Highly reliable</li> <li>• Raises sights and commitments (prospective leaders and donors)</li> <li>• Strengthens awareness, support, and positioning among stakeholders, community and constituents</li> </ul>
<b>Turn Key Feasibility Study</b>	See above	<ul style="list-style-type: none"> <li>• Consultant leads and performs most or all activities</li> <li>• Best for challenged or large-scale projects</li> <li>• Minimizes impact on client staff</li> <li>• Faster</li> </ul>



# TPG COMPANIES

## Capital Campaign Implementation

NOTE: Understanding schedule, scope, complexity, risk, leadership strength, fundraising history, lead gift strength and other factors are key to determine appropriate campaign goals, strategy, plan, roles and campaign investment budget. TPG’s Design-Build approach enables client and TPG to collaboratively articulate outcomes and agree to appropriate investment budget prior to paid engagement.

Consultant Role	Investment Range	Comments
<b>Ad Hoc</b>	N/A	<ul style="list-style-type: none"> <li>• Client and consultant agree on compensation approach and engagement parameters: hourly rate, daily rate, monthly retainer within client budget.</li> <li>• Most flexible</li> <li>• Easily fit to budget limitations</li> <li>• Works best with very experienced leaders and low-risk projects</li> <li>• Client buying “brains” (experience and expertise) via ad hoc basis; tools, plans, templates, documents not automatically included.</li> </ul>
<b>Limited Scope Coach or Campaign Counsel</b>	Scale of Investment required factors include: <ul style="list-style-type: none"> <li>• Organization Capacity,</li> <li>• Leadership</li> <li>• Case for Support</li> <li>• Staff and Board experience</li> <li>• Desired schedule campaign strategy / complexity</li> <li>• Breadth, depth and affinity of prospective donors</li> <li>• Other factors specific to the project, community and/or institution</li> </ul>	<ul style="list-style-type: none"> <li>• Baseline commitment according to client need and budget.</li> <li>• Client provides campaign director/co-directors</li> <li>• Consultant becomes core strategist; client and consultant collaboratively develop overall game plan</li> <li>• Client staff and volunteers execute</li> <li>• Limited ancillary services generally included</li> <li>• TPG services as professional resource to a few select leaders with one lead liaison.</li> </ul>
<b>Non-Resident Counsel and Campaign Director</b>	See factors above	<ul style="list-style-type: none"> <li>• Broader scope</li> <li>• More on-site time, typically two to four days per month—most often weekly or every other week, frequency determined with client.</li> <li>• High level of engagement and availability</li> <li>• Client staff and volunteers execute</li> <li>• Within parameters, TPG serves as campaign director: catalyst, facilitator, cheerleader, trainer, coach, key strategist, troubleshooter, standard keeper resource, boundary breaker, and “trouble maker.”</li> <li>• Select ancillary services or related counsel included as determined with client</li> <li>• TPG services as professional resource to full set of campaign leaders with one lead liaison.</li> </ul>



# TPG COMPANIES

<b>Part-time Resident Counsel and Campaign Director</b>	See factors above	<ul style="list-style-type: none"> <li>• Consultant on site 1 to 3 days per week (5 to 15 days per month) depending on budget, scale or complexity of campaign, and phase of campaign. Determined in advance with client.</li> <li>• Can be for full campaign or just for initial phase(s).</li> </ul>
<b>Full-time Resident Counsel and Campaign Director</b>	See factors above	<ul style="list-style-type: none"> <li>• On site daily for duration of campaign</li> <li>• High degree of client staff development</li> <li>• Faster</li> <li>• Less risk missing opportunities or goal</li> </ul>

### Ancillary Service Options That a Consultant May Offer:

- Grant writing
- Campaign staffing (on site and/or off site)
- Collateral materials writing, design, and production
- Prospect profiling / identification and qualification research
- Government relations
- Media communications services
- Project planning and management
- Executive search
- Business process analysis
- Strategic planning
- Technology projects (including software package selection and implementation, network design and implementation, and web development)
- Alliance and relationship building
- Executive coaching
- Event planning
- Administrative, clerical, executive support services