

JEROLD PANAS,
LINZY
PARTNERS



PREPARING FOR A FEASIBILITY/DEVELOPMENTAL ANALYSIS

The Nineteen Steps to Ensure a Successful Study

PREPARING FOR A FEASIBILITY/DEVELOPMENTAL ANALYSIS*

You are about to undertake one of the most significant phases in your total development program. In order to derive optimal benefits from the F/DA, it is important that the procedures described in this outline be followed carefully.

- i. Ask each Board member to send a list of 10 to 20 men and women he or she thinks should be interviewed for the Study. See *Exhibit A and B*.

These should be people who (a) are in a position to give generously; or (b) can affect family, foundation, or corporation giving; or (c) if they are not in either of these categories, they may be in some other position of community influence where their support or lack of support will be significant to the campaign. Actually, the list should contain each Board member's assessment of the ten to twenty most influential and affluent men and women of the community.
- ii. When the lists are returned to you, they should be combined and duplicate names eliminated. By this means, you will develop an accurate list of strong community leadership. You may wish to note how many times a name is listed, or prepare a final list and rank the names in the order they were mentioned most frequently.
- iii. Enlist a small group to help you in the selection of names. Be certain to consider for this selection committee people outside your Board if there are those who can be especially helpful in the identification process—trust officers from banks, prominent attorneys, CPAs, and so forth. You want the most knowledgeable people possible on this *ad hoc* committee.
- iv. Take the total unduplicated list of names which has been generated and ask your *ad hoc* committee to determine the 50 to 100 names which seem to them the most important. This is the time to add or delete names for the final list. Make confidential evaluations which will estimate the interviewee's potential for making a gift and/or providing top leadership.
- v. Assign the names of potential interviewees to one of three classifications:
 - those who must be interviewed
 - those who should be interviewed
 - those who could be interviewed if there is extra time
This culled list then becomes the basic group which is interviewed. The names that are eliminated can be used as substitute interviews should some of those within the prime groups not be available.
- vi. Keep all the names which are suggested on file. They will be used later for cultivation. Hopefully, you will end up with as many as 200 to 400 names.

**Feasibility/Developmental Analysis* is a study concept and process unique to this firm. The name has been Registered.

- vii. When you have compiled your roster of priority names, list them on the *Prospect Evaluation Grid*. This is displayed as **Exhibit C**. You should complete a *PEG* for each person to be interviewed.

Fill in as much data as you can with assistance from the ad hoc committee. This background is very helpful to the Study Director. It also will be advantageous to you in future cultivation of these prospects.

Have a small group review the names on the *PEGs* and give each a numerical ranking.

The vertical columns allow you to rank the financial capability of the prospect. There may be some in your interview group who have the capacity to provide a really significant major gift. They should receive the highest evaluation—a 9.

On the horizontal rows, you are to rank the interest or involvement the person has had in your organization—perhaps in the past but more important, in the present. If there is a very high involvement or interest, the person should receive as high a rating as a 9. If there is no involvement and no known interest, that would receive a very low rating—perhaps a 1 or 2.

Mark the *PEG* anyway which suits your purposes best. We have found it most effective to use a yellow highlighting marker to draw in the appropriate block on the *PEG*. This provides a perfect *at-a-glance* visual presentation, and is a good accompaniment to the numerical listing you write on the *PEG*.

For study purposes, you should challenge interviewing anyone who has a rating of 12 or less. That does not necessarily mean that the person should not be interviewed—only that it should raise some serious questions. There may be someone who receives a low score who, for instance, may have great influence. This would not necessarily show up on the *PEG*, but may be any excellent person for interviewing. Use your good judgment in making this type of a determination.

- viii. On the reverse side of the *PEG*, provide all of the information possible regarding the interviewee. The more data and background there is, the more effective the interview. If you have information from your own database, attach the material to the *PEG*.

You will note there is space for our Study Director to provide our own *PEG* ranking. This will help us in segmenting our information for the Study Report. It has nothing to do with the leadership or giving potential of the interviewee. We record that in detail on other forms we use.

Make certain that the name is spelled correctly and in full, and that the address is complete and accurate. Most often, our Study Director sends each person a brief handwritten note of appreciation the evening following the interview.

These sheets should be ready for the Study Director to use during the course of the interviews.

- ix. Punch the *PEGs* and place in three-ring binders. Place them in chronological order—starting with the first interview, then the second, and so on.

In the binder, also include each day's schedule: the date, time, the person's full name, address, and phone number.

- x. An introductory letter should be mailed to potential interviewees. This is *Exhibit D*. We have provided five samples. Prepare the letter to make it appropriate for your situation. Most often, the request for the interview is made by the chief volunteer officer of the organization or someone who knows the person to be interviewed. This responsibility may be divided among your Board members if this will help assure your ability to secure interviews. Who signs the letter is very important in securing the interview.
- xi. You may wish to include with the letter to prospective interviewees a description of what is involved in the interview. This is *Exhibit E*—and if you use it, it should be modified to suit your situation.
- xii. Securing the visit is obviously the most important step in the process. You may wish to prepare a document (*Exhibit F*) to help the caller to overcome objections to getting the visit. There's also a sample we provide that worked to great advantage for Children's Hospital of Wisconsin.
- xiii. Someone should be designated to keep a Master Schedule of the interviews so that no more than one interview is scheduled for any particular date and time, and to ensure productive and full use of the Study Director's time.
- xiv. The interviews should be scheduled to allow for an adequate and unhurried discussion, and sufficient time afterwards to get to the next person on the schedule. Allow for at least a 45 minute interview, although some may run longer than that. Interviews may be scheduled from 8 AM to 5 PM. Evening and week-end interviews may also be arranged. Very often, an effective interview can be conducted during breakfast, lunch, or dinner. Schedule whatever is most convenient for the interviewee and assures the Study Director a complete schedule.

For optimum results, you should schedule at least five interviews a day. Less than that does not make effective use of the Study Director. More than six is not particularly desirable either, although we have had many days when we conduct seven and eight interviews. These sessions are exhausting and involve meticulous note-taking. In the evening, the notes are collated, tabulated, and evaluated. More than six interviews a day, over an extended period, will not produce the best results for your Study.

- xv. The Study Director will conduct the interviews alone. In an unusual situation, if for some very special reason it is necessary to include someone from the institution in the interview, it may be done—but this is almost never desirable.
- xvi. The names of key Board members should be included among those to be interviewed. It will not be necessary to interview all of the Board, but it is important to determine how the most influential ones feel about the project. Interviews with Board members should be conducted with only the Board member and our Study Director present so that they will speak with the utmost freedom. It is important to emphasize that anything said in the interview is confidential and, while the person may be quoted, he or she may be certain that the source of any statement will remain in confidence.
- xvii. Whenever distances between appointments are beyond a short walk—say more than four blocks—you are to provide a car and driver for the Study Director to save precious time and ensure maintenance of the interview schedule.
- xviii. In many situations, the firm prepares a case statement to be used for interviewing. If our writer is not involved, you should provide a brief, but convincing statement—stating the basic reasons why you wish to raise funds and any pertinent facts about your project. This statement is used by the Study Director to inform those who are interviewed.
- xix. As the Study Director completes the interviews, a letter should be sent to the interviewees acknowledging the time and important assistance they have provided to the study project. A sample letter, which you may wish to edit, is included as *Exhibit G*. The letter should be individually typed and signed by the proper person.
- xx. The success and validity of the analysis depends totally on the quality of those who are interviewed—men and women who can make or influence large gifts. Of equal importance is interviewing sufficient sources to guarantee effective coverage. You will lose an opportunity of great consequence if you do not fill the Director's schedule—and with precisely *the right* people.

If you have any questions or if any phase of the F/DA needs amplification, by all means be in touch with us by letter or telephone. The better the preparations before the arrival of the Study Director, the better we can serve you.

JEROLD PANAS, LINZY & PARTNERS

500 North Michigan Avenue

Chicago, Illinois 60611

(312) 222-1212

(800) 234-7777

FAX: (312) 222-9411

EXHIBIT A

**TO MEMBERS OF THE BOARD OF DIRECTORS
(BOARD OF TRUSTEES AND/OR ADVISORY COMMITTEE, or whatever is
appropriate)**

These are important times in the life of the _____ (Institution) _____. While we are proud of the rich heritage and achievements of our past, it is to the future that we look for our greatest growth.

We have authorized the firm of Jerold Panas, Linzy & Partners to proceed with a Feasibility/Developmental Analysis. They have requested that we develop a list—a very special kind of list—of people in our area who occupy positions of leadership and influence. We need your help with this task.

The enclosed sheet provides twenty spaces for names. Use the reverse side for additional suggestions. Check the appropriate columns. This will be especially helpful later in determining how best to make contacts.

We are interested in "leadership" people. We want your suggestions of the men and women who: i) make things happen in our area; ii) because of their position or their special role are held in high regard and occupy a very special status; iii) have their fingers close to the pulse and heartbeat of our community; iv) because of their position and influence can help establish and determine the future direction of our area and our _____ (Institution) _____. *Most of all, we wish to interview those who are in the greatest position possible to make or influence large gifts.*

Please do not worry about submitting too many names. We need your recommendations of the most prominent and influential people. From all the names we receive, we shall build our list.

It is important that we receive your response no later than _____ (Date*) _____. Thank you so much of for your vital role in this special and important project.

Sincerely,

* Do not allow more than two weeks from receipt of this letter for the response.

EXHIBIT A₂

January 9, 2006

To: Members of the Board of Directors

These are important times in the life of the Bay Area Chapter. While we are proud of the rich heritage and achievements of our past, it is to the future that we look for our greatest growth. This last year has been a momentous one that holds significant implications for what the priorities for that future must be. The purpose of this letter is to solicit your help in addressing a critical priority that has been identified.

With the largest natural disasters in the history of the Red Cross occurring on the international (tsunami) and national (Katrina) fronts within a mere eight months of one another, this last year has shown us that preparedness can no longer be viewed as an adjunct to our strategy, it must become the centerpiece. And preparedness has two critical aspects to it: 1) we must ensure that the communities we serve are as prepared as possible to deal effectively with a major disaster, and 2) we must ensure that we, as the lead disaster response organization, are as prepared as possible to fulfill the role the public and our partners expect of us.

The official launch of *Prepare Bay Area* addresses the first aspect of our preparedness mission. It marks the beginning of the largest community preparedness effort ever attempted in the Bay Area, aimed at making us the most prepared region in the nation. The goal of equipping a million Bay Area residents over the next three years with the knowledge and skills essential to preparing for and responding to a major disaster is aggressive, but achievable. The program's focus on the most vulnerable segments of our population helps ensure that preparedness is available to all Bay Area residents. As a chapter, I think we can feel good about the leadership role we're assuming in preparing our communities.

The second preparedness imperative speaks to the trust which the public places in the Red Cross - to be there when and where we're needed following a disaster. It also speaks to the fact that our partners in response count on us to fulfill our assigned role in order to ensure the overall success of any relief effort. The chapter has been working with its response partners for some time now to determine how we would collectively respond to a catastrophic disaster here in the Bay Area. In light of Katrina, this planning has taken on new significance. The plan addresses such critical issues as how we would manage to shelter and feed up to 300,000 people who might be displaced from their homes in a major disaster.

A key issue which has emerged from that planning is our glaring lack of an effective Disaster Operations Center (DOC), the command center for relief operations that provides a place for disaster relief leaders and volunteers to direct and coordinate activities at various service delivery sites throughout the disaster-affected area. Technical resources to assist in information gathering and dissemination following a disaster would also be housed in the DOC.

In order to ensure our ability to effectively respond following a catastrophic event, a DOC would need to be strategically located, be structurally reinforced to ensure its continued viability following the event itself, be “operationally ready” on a 24-hour basis, and effectively employ state-of-the-art technology. In surveying our current situation relative to these defined requirements, the need to take definitive action becomes apparent.

This major hole in our response capability, together with our need to seek longer-term facilities solutions for chapter operations, formed the basis for the Strategic Presence Committee’s recommendation to employ a consulting firm to develop a case statement supporting the chapter’s needs and to “shop” that statement with influential and affluent members of our community to determine whether the case is understandable and compelling and the degree to which it would be supported financially.

We have contracted with the firm of Panas, Linzy & Partners to proceed with the feasibility study recommended by the Strategic Presence Committee. The firm has requested that we develop a list – a very special kind of list – of people in our area who occupy positions of leadership and influence. We very much need your help with this task.

The enclosed sheet provides twenty spaces for names. Use the reverse side for additional suggestions. Check the appropriate columns. This will be especially helpful later in determining how best to make contacts. Please do not worry about submitting too many names. We need your recommendations of the most prominent and influential people. From all the names we receive, we shall build our list of people to be contacted for interviews.

We are interested in “leadership” people. We want your suggestions of the men and women who: 1) make things happen in our area; 2) because of their position or their unique role are held in high regard and occupy a very elevated status; 3) have their fingers close to the pulse and heartbeat of our community; and, 4) because of their position and influence can help establish and determine the future direction in our area and for ARCBA. *Most of all, we wish to interview those who are in the greatest position possible to make or influence large gifts.*

In order to move expeditiously on this ambitious undertaking, it’s important that we receive your response back no later than Friday, January 20, 2006. Thank you so much for your vital participation in this project that is so critical to our future.

Best regards,

Harold W. Brooks

EXHIBIT B

Name: (fill in name of Board Member) _____

Please return this sheet in the enclosed envelope by ____ (Date) ____.
Use the reverse side for additional names. Thank you for your help.

Name of Person or Corporation	Please place a check mark (✓) where appropriate		
	Know Quite Well	Do Not Know Well	Do Not Know

Return to: _____

EXHIBIT C

JEROLD PANAS, LINZY & PARTNERS
 500 North Michigan Avenue
 Chicago, Illinois 60611

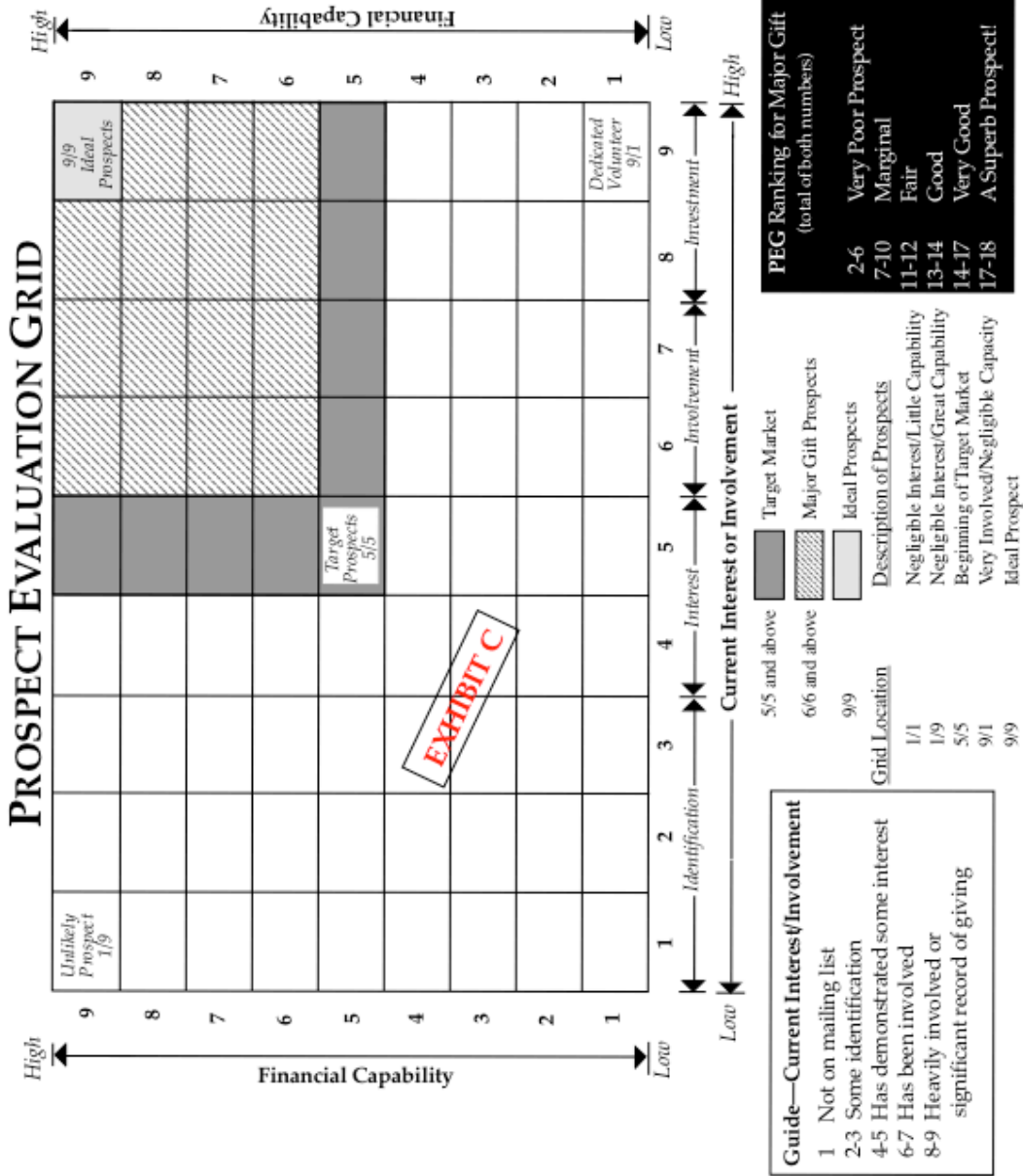


EXHIBIT D

ON LETTERHEAD OF SIGNER

Dear _____:

You perhaps know that I am chairman of the Task Force to help with the planning for the College of Engineering at Michigan. I accepted the assignment because I feel so strongly that the College has the potential for making a contribution to this country of consequential proportions. I believe we are positioned to do that.

In order to help us prepare for the future, the College has established some priorities that we want to examine, evaluate, and test. To prepare for this review process, we have retained a firm which specializes in this type of a study.

One phase of the analysis includes a visit with a very small group of key and important leaders who are close to the College of Engineering. The purpose of the interview is to assess your knowledge and understanding of the College. We are interested in knowing your evaluation of the priorities, how you rate the impact we are now making, and how you feel about our plans for the future. If you feel you do not know a great deal about us, that's important to hear, also.

We are contacting only a few men and women for these interviews. You are one with whom we especially wish to talk. I do hope this will be possible. Dean Johnson's office will be calling in the next few days to arrange for a time for your visit. On behalf of all those to whom the college means so much and those who will benefit so greatly in the future, I thank you for helping us in this very important endeavor.

Sincerely,

EXHIBIT D₁

Dear _____:

The _____ (Institution) _____ is currently engaged in a complete analysis of its needs and programs to help determine its future growth and direction. To prepare for part of this review process, we have retained a firm which specializes in this type of a study.

One phase of the examination includes a visit with a small group of key and important leaders. The purpose of the interview is to assess community knowledge and understanding of the _____ (Institution) _____. We are interested in knowing, also, how you evaluate our service and how you rate the impact we are making. If you do not know a great deal about us, that's important for us to hear, also.

We are contacting only a few men and women for these interviews. You are one with whom we especially wish to talk. I do hope that this will be possible.

We shall be calling you shortly to make an appointment. I thank you for helping us in this very important endeavor.

Sincerely,

EXHIBIT D₂

(This is an excellent example of one of our letters which was perfectly rewritten to reflect the unique situation of this institution.)

**SOUTHEASTERN
BAPTIST THEOLOGICAL
SEMINARY**

Office of the President
II Timothy 3:17



January 25, 2002

Mr. and Mrs. Matthew Caldwell
160 Club Drive
Simpsonville, SC 29681

Dear Bobbie and Matt:

Southeastern Baptist Theological Seminary is currently engaged in a complete analysis of its needs and programs to help plan for its future growth and direction. While we are grateful to God for His blessings and the achievements of recent years, we believe that we have an unprecedented opportunity to train the next generation of men and women who will literally take the gospel to the ends of the earth. In order to meet such a challenge, we must diligently review and evaluate our entire ministry. To prepare for part of this review process, we have retained a firm that specializes in this type of a study.

One phase of our study includes a personal interview with a small number of key and important leaders. The purpose of the visit is to assess the knowledge and understanding that individuals have of Southeastern Seminary, and whether you believe that we are fulfilling our mission. We are interested in knowing how you evaluate our training of men and women for ministry, and what impact we are making in our churches, schools and mission endeavors. Even if you do not know a great deal about us, that is important for us to know. Your insight is invaluable to us as we plan for the future.

We are contacting only a few men and women for these discussions. You are one with whom we especially wish to visit. I do hope that this will be possible. Your input will be invaluable as we look forward to the future.

Since I will be in the Philippines on a mission trip for the next three weeks, I am asking Dr. Bart Neal or one of his staff to contact you personally to make an appointment. Thank you in advance for your help in this very important endeavor. We believe that this is the beginning of even greater things to come for Southeastern.

Until He Comes,

A handwritten signature in cursive script that reads "Paige Patterson".

Paige Patterson

EXHIBIT D₃



The Mission Society
For United Methodists

P.O. Box 922637
Norcross, Georgia 30090-2637
Phone: 770-446-1381 • Fax: 770-446-3044

Mr. and Mrs. John J. Brown
123 Cherry Street
Lexington, Kentucky 40502

Dear John and Jane:

The **Mission Society for United Methodists** is an exciting place to be these days. We now have 147 missionaries serving in 30 countries. We are in the process of opening a new field in Egypt and praying about the new ministry in another Muslim nation.

Our World Parish Ministries is helping countless churches capture a heart for missions. Lives are being won to Jesus Christ through our efforts. We feel privileged to be our Lord's messenger.

We are now considering the feasibility of a campaign to increase the scope and impact of **MSUM's** ministry. We want to determine how our friends and supporters feel about our work and ministry and our plans for the future.

We are asking a few men and women to help us resolve what might be the next appropriate steps for us to take. You are one of the important couples we wish to talk with.

We have engaged a firm that specializes in this type of a study to conduct these visits and then to prepare a report with recommendations. Our office will be calling you in the next few days to invite your participation in this very important interview process and answer any questions you may have.

It is important to emphasize two things. First, this is not a meeting to ask you for a gift. Secondly, your comments and views on **MSUM** are confidential. The results of the meeting with you and others are reported anonymously.

I will be very grateful to you for taking time to advise **MSUM** through this study as we prepare to undertake a significant step in our development as a major mission agency. Your participation will be immensely valuable in helping us plan for the future of our mission efforts and immeasurably increase our impact on the world.

Grace and peace,

Philip R. Granger
President and CEO

EXHIBIT D₄

DRAFT

Dear

I am writing to you today on a personal basis. I am not writing to you to ask for a gift. We have selected you and nineteen others around the country because we need your wisdom and perspective. Let me explain.

CAFOD, as you know, is the international development and relief organisation of the Catholic Church in England and Wales with direct responsibility of serving the poorest of the world.

We are very proud of our 40 year history of saving and improving lives and bringing hope to the poor. We are especially proud of our high efficiency and our exceptional staff and partnership network. We work in 50 countries with our worldwide staff. Through our church partners we have an unparalleled ability to interact with the poor of the world.

Until very recently, we were an organisation that depended on perhaps a hundred thousand small donations a year. This has amounted to hundreds of millions of pounds over the years. A few gifts were received at the million pound level, but they were rare.

We have never made an effort to interact specifically with lay Catholic leaders but our faith now demands that we become proactive in a major gift effort. As a direct result we are planning our first ever national campaign to make contact with Catholics blessed with means, all over England and Wales. We are doing everything possible, including this select effort, to ensure that we are as successful as possible.

As part of this 'due diligence' we have selected twenty people. Some are donors, some are not. We believe all are sophisticated in efforts such as we envisage. None are actually involved in the planning of our efforts. For example, none are CAFOD board members. This is on purpose. We are looking for new opinions. I need your help.

I would respectfully request that you give my colleagues one hour to discuss this idea with you. I will ask Jeremy Prall to call you to discuss possible dates for a meeting. The individual meeting will include Jeremy, Chris Bain CAFOD Director and Oleg Lobanov, who developed a similar organisation for CRS – CAFOD's sister organisation in the United States.

It is my hope that after that meeting you will be interested enough to join me personally for a meeting to discuss the formation of a steering committee.

Thank you for your consideration. I would not ask you to do this if I did not believe that the effort we plan will allow CAFOD to save even more of the world's poor.

Devotedly yours in Christ,

Cardinal Cormac Murphy-O'Connor
Archbishop of Westminster

EXHIBIT E

LETTER TO BE SENT TO CONFIRM THE VISIT

(After you have made your call and determined that the person is willing to be interviewed, you should send a confirmation letter, a copy of the question & answer piece, and a copy of the case statement. The type of letter you may wish to use as a sample follows.)

Miss Lotta Money
123 Cherry Street
Anytown, Ohio

Dear Lotta:

I am so pleased that we were able to arrange the time for your visit. The session with you is particularly important.

Jerold Panas will be at your home on (Date) , at (Time) . As I mentioned, he would like to have about one hour with you.

I'm sending a copy of our planning document. It describes the (Institution's) vision for the future. It is only a visual-draft— that is why it is especially important that we get your reaction before it is put in final form.

Please review it, mark it up in any way you wish, and indicate any areas that aren't clear.

Thank you so very much. Your counsel and guidance will be immensely valuable in guiding us to the future.

Sincerely,

EXHIBIT E₁

THE INTERVIEW

WHO WILL BE INTERVIEWED? A small, select group of leaders is being asked to participate in the study. Through our Board, senior staff and members of the Wycliffe President's Council, names of a large number of men and women were nominated—and a committee prayerfully honed the list and selected a special roster to be interviewed. The final group was chosen on the basis of a number of factors. Most of all, it was felt that the combined insights, experience, guidance and counsel of the group will help us measurably in planning our future. It was not necessarily important that all members of our study-universe have a great understanding or knowledge of Wycliffe or Bible translation.

WHAT WILL BE ASKED? A series of questions will be asked that relate to the future of Wycliffe and the world-wide Bible translation movement. Each person will be asked the same questions so that we can determine whether there is any consensus. This will enable us to refine and adjust our plan—and take appropriate action from what we have learned. It is also important for us to know what information and understanding about Wycliffe you do not have.

WHO WILL INTERVIEW ME? We have retained a firm, nationally regarded in planning and development, to conduct the interviews and submit findings and recommendations to Wycliffe's President/CEO and Board of Directors. We are using an outside firm for two reasons: i) to provide absolute confidentiality for those who participate in the interviews, and ii) to ensure objectivity in evaluating the results of the interviews. We believe that wisdom is found in the counsel of many—so accurate and objective analysis is crucial to our success. Jerold Panas, who will visit with you, is professionally trained, with over 40 years of experience in over 2,500 studies of this type, and has been especially chosen for this project by the Wycliffe President's Council.

WILL I BE ASKED FOR MORE THAN MY OPINIONS? WILL I BE ASKED FOR A GIFT? No. Your opinions, ideas, and guidance will be sought. We shall explore as carefully as possible your perceptions about Wycliffe, Bible translation and our prospective plans. We are interested in knowing, through the interviewer, your thoughts and your attitudes. And yes, you will be asked about giving—but you will not be asked for a gift!

HOW MUCH TIME WILL THE INTERVIEW REQUIRE? Your interview should last about 45 minutes. Some sessions last longer and some take less time. A great deal depends on you, the manner in which the interview develops, and how much time you wish to give. It is entirely up to you.

WILL OTHERS KNOW WHAT I SAID? Your response and comments will be kept in total confidence. No one will ever know what you have said.

WILL I HEAR ABOUT THE RESULTS? When the interviews are completed, a written Report will be presented to the President/CEO and Board of Wycliffe. At this time, we shall know of the findings, observations, and recommendations—all based on your interview and the sessions with the other small group of leaders. You will receive a Summary of the findings and it is possible that we shall bring the interview-group together for a brief meeting to review the results and suggested next steps.

THANK YOU SO VERY MUCH FOR YOUR ASSISTANCE. We have spent a great deal of time in prayer, meetings and discussions in developing our plans. One of the most significant elements in the entire process is these interviews. We highly value your time and counsel, and are deeply grateful to you.



EXHIBIT F

GETTING THE APPOINTMENT

1. You have developed the list of sources you wish to interview. You will likely find that in order to get two visits, you will need to call on three different people.
2. A letter goes to the roster indicating you will be calling in the next few days to request a visit. There are sample letters in the Manual of that letter.

There should be one person responsible for the scheduling. We warn you— it's not a pleasant task!

The person who signs the letter asking for the visit should be the most difficult person to say “no” to. It could be a Board member, the CEO, the college president, whomever.

When you get through to the person (or to an assistant in the person's office), you indicate that: “I'm calling for (whoever signed the letter). We want to schedule a time when you can meet with our Study Director.”

3. Review the list of questions most often asked about the interview. One or more will possibly come up in the call arranging for the interview.

Some others we have heard:

I don't really know enough about the program or the organization to be helpful.

Even that information will be helpful to our Study Director. It's important to know how we can tell our story more effectively.

I'm desperate now on time. I'm afraid there isn't time to meet with your Study Director.

We can fashion the meeting to fit your time schedule. We can do this even if it means meeting with you for 10 or 15 minutes. It would be extremely helpful.

You're going to be talking about money, and I don't have anything to give away this year.

We will be talking about money, but not about a gift. If you decide later on that you are sufficiently interested in the program to make a gift, that will be entirely up to you. But you will not be asked for a gift at this meeting.

I think my wife really knows more about this sort of thing than I do.

Good! The Study Director will meet with the two of you.

The truth is, I'm not really a big fan of your organization. In fact, it's pretty low on my list.

I'm sorry to hear that, but even that's very important for us to learn about. We need to meet with you and find out why you feel the way you do.

4. For those willing to meet, try to get them to fill a slot as early in the schedule as possible. You will need to put the calendar together as soon as possible.
5. The hope is that you can get five appointments a day. That may mean a lot of calls.
6. When you get through by phone, be certain to keep detailed notes of what the person says— whether they agree to a meeting or decline. Be sure to include which of their numbers (office or home) you called.
7. In every case, whether or not you get through, please keep a log of every call you made along with the date and time, and what number you called. Indicate the conversation you had.

Overcoming Objections to Getting the Visit

Comment: While I know that Children's is a great organization, I simply don't want to get involved with another organization.

Answer #1: If we're going to be successful, we need the input of community leaders such as you. We need your feedback on what we're proposing for the future.

Answer #2: While I understand what you're saying, I can tell you that since I've been involved with Children's, I've come to learn what a gem it is for our community. By participating in this study, you will simply be sharing your opinions.

Answer #3: Our kids deserve the best. The outline we would like to share with you identifies areas in which we feel we can have a dramatic impact on kids and their families in our community. We believe that Wisconsin kids can be the healthiest in the nation. We've identified focus areas in which we can make a significant impact and where we can have a real and lasting impact. However, we need your input to help us determine if we're focusing on the right things for our community.

Answer #4: I'd encourage you to take a look at Children's. I'm personally inspired by our leadership team right now. They are bringing a dramatic new strategy to Children's and has changed the tone of Children's. The Board of Directors feels we can do more to help Children's become the standard setter, not only locally, but nationally and potentially even globally.

Comment: Children's has too much money or Children's has enough money.

Answer #1: Children's is a well run organization. However, the economy has taken its toll as so much of what we do is not covered by insurance. We need support to continue to give children access to quality health care and social services. We will continue to care for the state's most vulnerable children, including children in the public child welfare system. Improving the health of Wisconsin's kids will strengthen our state.

Answer #2: Our mission is to care for kids in our service area whether they can afford to pay or not. Many families in the region have lost jobs and insurance benefits.

- Medicaid pays significantly less than it costs us to provide care. Medicaid only reimburses us about 50 cents for every dollar we spend.
- Now, more than half of our patients (up to 54 percent, from 46 percent just a short time ago) rely on Medicaid for their insurance coverage. That's the highest level in many years.
- For every 1 percent increase in Medicaid in our payer mix, there is a negative impact of more than \$3 million in our available resources to provide care.
- In addition to increasing levels of Medicaid, the market has been down and our investment income will be less than expected. Hospital volumes are down as families postpone care due to their finances.

Answer #3: Our Board of Directors mandates that we maintain a 5% operating margin. The targeted margin is required to maintain our viability in the bond market (maintain our AA rating), our debt service and, ultimately, the national positioning of our organization. Any additional net profits and charitable gifts are invested back into our programs for children – many of them non-reimbursable.

Comment: Our health care costs are already too high. Won't new initiatives increase the cost of healthcare?

Answer #1: No. Children's Hospital of Wisconsin charges less for medical care than nearly any other pediatric medical center in the United States. We will continue to blend compassionate, cutting-edge care with quality and efficiency to remain one of the nation's lowest cost providers of children's health care.

Answer #2: Children's does so much more than just run a hospital. We have many community initiatives – many of whom are non-revenue generating. We support these programs because it makes for a healthier community and a more efficient and effective health care system.

Answer #3: In order to achieve our vision of having the healthiest kids in the nation, we need the community's help to go outside the walls of the hospital so we can fund programs and services that help children in Milwaukee's underserved neighborhoods. We realize that we cannot do it alone and that we must partner with organizations to bring the services and programs into the community. Improving the health of Wisconsin's kids will strengthen our state.

Answer #4: Children's needs to continue to grow to meet the needs of future generations. In order to do that, we have to look for partnerships that can help us make a dramatic impact on kids and their families in our community.

Comment: I'm already giving as much as I'm going to in support of Children's or . . . This just isn't a good time for me.

Answer #1: I'm only asking for an hour of your time to help define the future for kids in our community. It would mean a lot to me personally if you would take the time to do this.

Answer #2: I believe in the new strategic direction of Children's. This is important enough to me that I am investing considerable time to this to help ensure success. We will be respectful of whatever time you can give us. I wouldn't ask you if I did not believe in it myself. I feel like you'd be playing a critical part in shaping the future of Children's.

Answer #3: We are not asking for donations at this time. You would be helping us shape the future for our kids in our community and beyond.

Strategic Plan - General Talking Points:

- **Children's Vision:** During the past two years, with input from our Board, our physicians, employees and our patient families, we've begun to craft a vision for the future. We believe Wisconsin kids can be the "healthiest children in the nation".
- **National Programs:** Our strategy includes developing key medical programs that will attract families from across the country for very special types of care and to be a leading provider of pediatric health care in the Midwest.
- **Improving Health Status of Kids:** We will partner with other organizations to improve the health status of children in our own community.
 - Children's is committed to playing a key role in helping to address significant health disparities among children.
 - We want to be a partner with others to reduce infant mortality rates, currently some of the worst in the nation.
 - Children's advocates for children on important issues, such as immunizations, asthma care, obesity, mental illness and safety.
- **Quality of Care and Outcomes:** We continue our commitment to excellent service and high quality care and outcomes.

- **Service**: We will respond to changing needs in the community and in the health care market. We ensure our care is safe, efficient, effective, timely, equitable and patient-centered.
- **Research**: We are conducting focused pediatric research to find cures and treatments for childhood illnesses and diseases. We are unique in our approach of applying research to bedside clinical care.

EXHIBIT G

Dear _____:

Thank you for taking time to talk with the Study Director regarding our needs and our future plans. I speak for all of the Staff and Board at _____ (Institution) —we are most grateful to you for your thoughtful consideration and your valuable assistance.

Your counsel and suggestions are most important. As a result of the interviews with you and other leadership people, our consulting firm will prepare a formal study report which will be presented to us in the near future. As you can well understand, the recommendations in the study will have a consequential bearing on our activities in the years ahead.

We hope to share the findings and recommendations with you. We shall be in contact with you soon in that regard. In the meantime, should you have any questions or suggestions for us, please know that I will be pleased to hear from you.

Thank you again for your willingness to assist.

Sincerely,