

Fund-raiser Interview Form

Name of Capital Campaign Company

Presenting Partner / Associate

Size of the Firm: _____ Number of Partners/Principals
_____ Number of Professional Staff
_____ Total Size with Support Staff

Years in Business: _____

Committee Members: After listening to their responses in each category, assign a score to each one ranging from a low of 1 to a high of 10. Space is provided for your notes and thoughts.

1. The Working Team's Track Record

1 | _____ | _____ | _____ | 5 | _____ | _____ | _____ | _____ | 10
2 3 4 6 7 8 9

Items/Questions to be covered:

- Who will make up the working team for our capital fund drive?
- Give us some of their background, areas of expertise, and similar church projects worked on.
- Who would lead the feasibility study? Who would lead the overall campaign?
- Get statistics of funds raised and collected versus annual giving. What is the accuracy of feasibility studies?
- Who will lead our capital fund campaign, and what challenges do you see there?

Notes: _____

2. The Team's Process Skills

1 | _____ | _____ | _____ | 5 | _____ | _____ | _____ | _____ | 10
2 3 4 6 7 8 9

Items/Questions to be covered:

- How would you propose to involve parishioners in the campaign?
- How would you go about a feasibility study in a parish like ours?
- What tools would you use in creating the feasibility study?
- Would you use focus groups? Telephone surveys? Personal interviews? How many of each?
- How would you envision the specifics of a capital fund campaign in this parish?

Notes: _____

3. Their Style and Adaptability

1 | _____ | _____ | _____ | 5 | _____ | _____ | _____ | _____ | 10
2 3 4 6 7 8 9

Items/Questions to be covered:

- Can you share with us some different styles of campaigns that you have worked on?
- Are your services “menu available,” i.e., pick and choose what we want and need?
- How would you learn who we are so as to create more effective materials and approaches?
- What would a timetable look like in general? For the feasibility study? For the campaign itself?
- What would the role of prayer be in the campaign?

Notes: _____

4. Practicalities and Miscellaneous Items

1 | _____ | _____ | _____ | 5 | _____ | _____ | _____ | _____ | 10
2 3 4 6 7 8 9

Items/Questions to be covered:

- Can you say what your philosophy of fund-raising is and how you differ from other firms?
- What would be the range of costs we could expect for you?
- What are the general costs for a capital campaign drive in a parish this size?
- Have you worked with our diocese on feasibility studies?
- Are you familiar with what they require?
- If the campaign finished 30 percent under estimates/needs, what would you do?

Notes: _____

5. The X-factor

1 | _____ | _____ | _____ | 5 | _____ | _____ | _____ | _____ | 10
2 3 4 6 7 8 9

Items/Questions are *not* asked of the interviewee, but of yourself at the end of the interview:

- Is this firm a fit for our parishioners? For our steering committee? Can we work with them?
- Does their perceived style match ours? Am I comfortable with them?
- Will parishioners be comfortable with them?
- Are they structured and knowledgeable enough to render the services needed and be successful?
- Are they adaptable, flexible, and creative enough to provide us with what we need?
- Are they sensitive to local issues, history, events, circumstances, etc.?
- Is this a fit for our people and our needs? Is the chemistry right? Can we work with them?

Notes: _____

