Feasibility Study Executive Summary

I² Consulting is pleased to present this summary report of the Feasibility Study to Casa Esperanza Montessori Charter School. The Feasibility Study assessed the ability of the school to conduct a capital campaign in the amount of $5,000,000. The study tested the community’s perception of Casa Esperanza Montessori Charter School, potential leaders for the campaign, and if the organization could attain donors and donations to achieve their financial goal. In addition, the Study assessed the leadership potential of such an effort and provided planning and strategy recommendations for a proposed campaign.

### Feasibility Study Participants

- A total of eighteen (18) interviews were conducted
- A parent survey was distributed
- A parent focus group was conducted

### Key Findings

Findings for the school’s current programs and plans for expansion are positive, but concerns do exist for the organization in a couple of key areas.

- Respondents were not very knowledgeable about the location of the school with only forty-seven percent (47%) of respondents saying they knew of its location while thirty-five percent (35%) have visited the campus
- Approximately thirty-five percent (35%) of the respondents had no knowledge of the school
- When asked if the school filled a real need in the community, sixty-seven percent (67%) of the respondents said yes
- When asked to rate the school’s image, fifty-six percent (56%) of the respondents reflected the opinion that the school did not project any type of image to the community
- Seventy-eight percent (78%) of the respondents felt they did not have enough knowledge about the school to rate its reputation in the community
• Forty-four percent (44%) of the respondents knew at least one member of the Board of Directors but seventy-eight percent (78%) did not have enough knowledge to rate the effectiveness of organizational leadership
• Seventy-two percent (72%) of parents reported in the parent survey that they would support a capital campaign project
• Sixty-seven percent (67%) of parents reported they would volunteer on the project
• Thirty-three percent (33%) of those interviewed stated they would make a financial contribution to a campaign conducted by the school while thirty-three percent (33%) were undecided
• Seventeen percent (17%) of those interviewed stated they would consider volunteering in some capacity for the campaign while fifty-five percent (55%) would not commit either way
• Fifty percent (50%) of the respondents in the face to face interviews indicated the school could in fact be successful in a capital campaign effort and thirty-three percent (33%) were undecided

**Evaluation**

The study to determine the viability of this project met with support and some trepidation from those individuals interviewed. While the responses were informative and enlightening, there was also serious concern about the school’s capacity in conducting a campaign for $5,000,000. The respondents were in agreement that the school needed to build a new facility and some funds could be raised for such an effort.

**Analysis & Recommendations**

It is the professional opinion of I² Consulting that Casa Esperanza Montessori Charter School has the capacity to raise $1,000,000 for a capital campaign if the tasks listed below are completed prior to launching an internal or external campaign.

- Determine who internally can “own” the campaign. There must be someone inside the organization that can devote a sufficient amount of time to the campaign and work to coordinate meetings with volunteers and manage the day to day logistics of the campaign.
- Immediately put together a “top notch” marketing committee comprised of board members and external volunteers. Charge this committee with creating and implementing an aggressive marketing and public relations plan geared toward elevating the brand, controlling the message of
the school and putting CEMCS on Raleigh’s radar screen. The work of this committee will begin to build the case publicly for the proposed expansion and thus the campaign.

- Create a cultivation strategy for each of the top twenty-five leaders and potential supporters in the Raleigh area; starting with CEMCS family. The goal is to “create touches” and educate these influential individuals and corporate leaders about the school.

- Appoint a committee to re-examine the campaign goals and objectives. In addition, this committee needs create a comprehensive budget for the cost of the campaign. This should include the cost of the development and execution of a campaign as well as obtaining construction and operations costs for the new facility.

- Create an advocacy program to be executed by the Head of School and the Board of Directors. The advocacy program needs to be developed with the primary focus being the expanded community knowledge of the board and the professional leadership.

- The Board must continue to focus on the need for continued board development. The school needs to focus on the recruitment of board volunteers who are more easily identifiable within all giving circles.

- Assess the commitment of the current board and parents to support the campaign not only philosophically but financially. The internal family will need to generate 50% of the stated goal of $1,000,000. This is a must for the success of the campaign.

A recommended timeline would be:

- September 2012-January 2013: Develop and implement Marketing and PR campaign
- February 2013-June 2013: Complete internal preparations for the campaign
- July 2013: Begin external solicitations