

Campaign Planning Study Proposal



*Kalispell, Montana
February 2026*

Presented by:
CAMPAIGN
COUNSEL.ORG

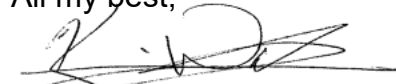
February 6, 2026

Teri Dugan
Flathead County Library
247 1st Ave. E
Kalispell, MT 59901

Dear Teri,

Thank you for the opportunity to present you with our Capital Campaign Planning Study Proposal. We are excited by the opportunity to get back to work with you and your leadership in exploring the fundraising capacity of the library and the region. Please do not hesitate to contact me with any questions.

All my best,



Kevin Wallace
President and Partner

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Organizational Overview

Campaign Counsel is an innovative consultancy firm with decades of experience working with organizations inspired to grow their impact and sustainability through major-gift fundraising. We are a specialized company; all of our work focuses on campaign planning and management for organizations seeking to improve their capacity.

- We were founded in 2003.
- Our team has combined fundraising and nonprofit experience totaling more than 50 years.
- Our company has conducted more than 80 campaign planning studies and 70 capital campaigns that have raised over \$200 million.

Campaign Counsel has three partner consultants and one data management specialist. Clients work with the same consultant(s) for the duration of the contract.

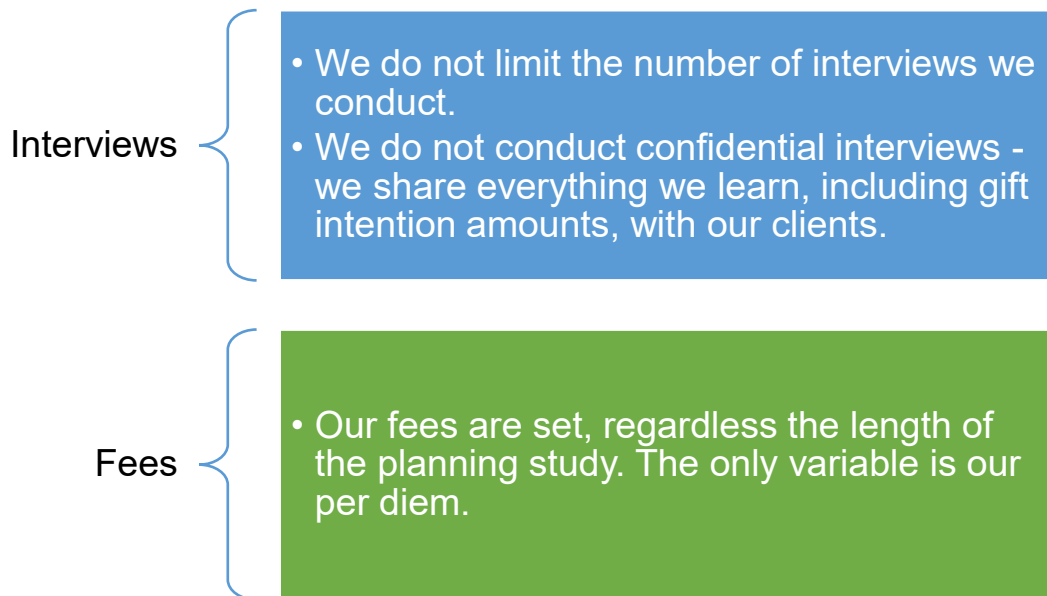
We are a nationwide company. Therefore, our team brings an impressive depth of experience to our clients. Campaign Counsel has led campaigns throughout the United States and partnered with 13 libraries for all phases of campaign planning (feasibility studies) and management.

We have planned/managed campaigns for ten nonprofits in five Montana cities: Billings, Missoula, Polson, Kalispell and Big Fork. Our knowledge of and relationships with donors (individuals, foundations and corporations) throughout Montana is considerable. Our nationwide library clients include:

Library	Campaign Services Provided
Missoula Public Library (Missoula, MT)	Planning and Management (\$6 million)
Billings Public Library (Billings, MT)	Planning and Management (\$5 million)
North Lake County Public Library (Polson, MT)	Planning and Management (\$2.5 million)
Big Fork Public Library (Bigfork, MT)	Management (\$2 million)
Kalispell Public Library (Kalispell, MT)	Planning
Benbrook Public Library (Benbrook, TX)	Planning
Bedford Hills Library (Bedford Hills, NY)	Planning
Ferguson Public Library (Stamford, CT)	Advancement Audit
Granby Public Library (Granby, CT)	Planning
John C Hart Library (Yorktown, NY)	Planning
Massachusetts Library System (MA)	Case for Support Development
Montgomery County - Norristown Public Library (Norristown, PA)	Planning
Preston Royal Public Library (Dallas, TX)	Planning

A well-designed and implemented Campaign Planning Study will help the Flathead County Library (FCL) to identify, qualify, educate and cultivate existing and potential donors. It will also position FCL for a successful capital campaign to construct a new library and further strengthen the library's long-range fundraising capacity.

Our company's success is due, in part, to our campaign planning philosophy. It centers on our clients' needs and how addressing those needs will benefit their constituents. Our Campaign Planning services provide two important elements that FCL will find beneficial:



This philosophy reflects our team's tenacity. We don't believe it is enough to confidentially interview a limited number of prospective donors. It is our job to continue interviewing until both our organizations are satisfied with the transparent efforts made towards determining your ability to reach or exceed your project goal.

Our team's capacity to lead this campaign planning study is threefold. First, we have exceptional consultants. Our primary focus is capital campaigns, which are very different from special events or direct marketing fundraising. It is a blend of art and science. For example, leading personal interviews with prospective donors that produce relevant information is an art that requires years to master. Our team has interviewed more than 6,000 prospective donors in the past 20 years. Over 1,000 of these interviews were for library projects, so we have considerable experience discerning prospective donors' motivations for supporting (or not supporting) projects similar to this one.

Second, we have expert data specialists who will work with FCL to identify and qualify existing and potential donors utilizing our iWave (wealth screening and prospect research) software. This work requires high levels of technical proficiency, which is

augmented with online research. This is the science of campaign planning and again, it requires years of practice to master.

Approach and Methodology

The goal of this Campaign Planning Study is to prepare FCL and its potential donor constituency for a capital campaign, and to determine how much money can be raised during its campaign. However, the lengths to which our team goes to acquire and share that information with our clients is what separates Campaign Counsel from other consultancies.

The Campaign Planning Study process is designed to:

- Prepare your leadership for the processes that will result in a successful study and capital campaign.
- Elicit advice from community leaders and philanthropists regarding the needs of the project, along with how a successful campaign will benefit your cardholders and network of libraries.
- Identify prospective leaders and donors who are interested in participating in the campaign. This is done in three ways:
 - Our team will analyze FCL's existing donor list to qualify interview prospects.
 - During personal interviews, we will ask for additional names of individuals, corporations and foundations that should be included in the study.
 - Our team will conduct independent online research and run queries in iWave to discover new potential donors for interviews.
- Initiate the donor education and cultivation process.
- Gather sufficient information to devise a capital campaign plan that will meet FCL's fundraising goals. This will include how to successfully solicit major-gift donor prospects.

Following is an overview of the entire campaign planning process.

Step One: We get to know the Flathead County Library and FCL Foundation.

Our first step is to interview your organization's leadership (Board of Trustees, Foundation Board and administrative staff). We call this an **Internal Audit**. Its goal is threefold:

1. Listen to your leaders so we can learn about your culture and your vision for this project.
2. Engage with and educate your leaders so they understand and support our common goal: to plan the best campaign possible.
3. Prepare materials for Step Two, which is when our team initiates donor prospect interviews.

The Internal Audit is simple to execute. An FCL staff member or volunteer schedules one-on-one interviews with its leaders and our consultants. We do not limit the number of interviews we conduct in the Audit or Community Analysis.

Once the interviews are complete, and after we have learned about FCL's donor data gathering and management capacity, we will deliver a report outlining our findings.

Step Two: We ask for advice from FCL's existing and prospective donors and leaders.

Our second step is to take what we learned during the Internal Audit and present it to leaders and philanthropists throughout FCL's service area. We call this our **Community Analysis**. Its goals have four levels of detail:

Identify	Qualify	Educate	Cultivate
Who are our prospective donors?	Which prospects have the capacity to make major gifts?		
Who are our prospective leaders?	How can existing and prospective leaders assist in the campaign?	Inform prospects on the campaign vision.	Prepare prospects for potential campaign solicitation and campaign leadership.

The Community Analysis takes grit and determination to execute. An FCL staff member and/or volunteer schedules one-on-one interviews (in-person, virtual, phone) between our consultants and leaders and philanthropists so we can have in-depth conversations about the project's vision. These interview findings will determine your campaign capacity – who will give, how much, why, and when.

Following is an outline of the Community Analysis' processes and outcomes.

Goals	Processes	Outcomes
Identify	Interview prospects are identified through: <ul style="list-style-type: none"> • Internal Audit • FCL database • iWave¹ 	Interviewees' contact information is managed in Excel.

¹ Campaign Counsel conducts its wealth screening and donor prospect discovery through its [iWave](#) subscription.

Goals	Processes	Outcomes
Qualify	Interview prospects are qualified through: <ul style="list-style-type: none"> • Internal Audit • FCL database • iWave 	Interviewees' capacity to support the campaign is managed in Excel.
Educate	Our team conducts personal interviews with existing and potential leaders/donors to inform them on the needs and benefits of the project.	Interviewees learn why this campaign is necessary and how it benefits the library and the regions it serves.
Cultivate	Through personal interviews, leader/donor prospects share advice on what they like and dislike about the project. Approximately one-third provide a gift intention amount.	Interviewees are aware of and prepared for the campaign.

Tools: Data and AI

Campaign Counsel focuses on capital campaign fundraising that continues to build trust and human connections, while tapping into the modern breakthroughs in data and technology, including AI, that have forever transformed the way we work, live and give.

Data Insights

Understanding data – name, address, phone, email, interests, events attended, amount gave, when gave, etc. – can provide the opportunity to create personalized experiences with your donors. Used well, it can create connection and relevance. These data points reflect an individual's values, how they see themselves and the kind of world they want to live in.

Our goal is to transform data into individual human stories that allow you to personalize the experience, asking the right person, for the right amount, at the right time.

Wealth screening pulls together information that goes far beyond just wealth. It takes your data and matches it to publicly available information sources, such as real estate, asset ownership, stock holding information, businesses, connections and other philanthropic giving. Each record is compared to billions of different data points to bring you back an estimation of a donor's potential capacity to give, their affinity to the organization, and other critical information and insights into how to cultivate and engage each donor and help them become champions to your cause. A wealth screening can add important informational data to your records, providing insight into an individual's capacity, propensity and potential generosity.

Campaign Counsel provides a screening of 2,000 records as part of our Campaign Planning Study process. If you would like more records screened there is a charge of 30 cents a record.

Campaign Counsel compares data provided by your organization with information generated during our iWave wealth screening to:

- Gain insight into your current donors' values, interests and capacity for capital campaign leadership gifts.
- Identify people who will be good interview candidates for your Campaign Planning Study and prospective donors to the eventual campaign.
- Identify underutilized donors, those individuals who might do more for you given the right opportunity.
- Uncover new local donors through connections to institutions, board members and foundations.
- Find local, regional and national foundations that are potential planning study interview prospects and campaign supporters.

AI Support

Campaign Counsel has loaded its own internal AI agent with its 30+ years of capital campaign experience, knowledge and tools to enable smarter, data-driven decisions. We will work with you, who know your donors best, to expand donor insights and develop personalized engagement strategies in an even more efficient way using the power of AI to turn insight into action.

This shift to AI-supported capital campaign fundraising does not replace human connection or human driven insights provided by your team. It also does not replace the human expertise needed to manage a successful capital campaign. Instead, it can provide data-driven insights that empower you to focus on what matters most: growing relationships, building trust and sharing your vision. Using AI tools to tailor communications and refine campaign targeting also increases our efficiency and service to you.

Researching foundations and shaping a smarter grant strategy are improved by AI tools. Analyzing grant records and 990 data, we can quickly identify which foundations best align with your organization's mission, geography and project. That leads to producing strategic, insight-driven grant proposals.

Maintaining the privacy of donor data is vital. Confidentiality is stressed every time we discuss with nonprofit leaders and campaign committee members our potential donors and what is learned about them through a wealth screen. When analyzing wealth screen data with our internal AI agent, we use best practices to avoid uploading personally identifiable information, including removing names and contact information from any files we assess using AI.

Other Tools

Once we enter a campaign, the dynamic dashboard and tracking tools provided by the Above Goal capital campaign software we utilize for every campaign help us keep a close eye on the fundraising process as it happens. Generating clear, actionable Key Performance Indicators (KPI) reports and keeping detailed notes on prospect positions in the campaign pipeline help to keep committee members' solicitation work moving forward.

Ultimately, technology can serve as a powerful tool to support, but not replace, the human relationships at the heart of philanthropy. Harnessing AI and data thoughtfully and strategically leads to smarter, data-informed decision-making, personalized engagement that deepens donor relationships, and streamlined capital campaign fundraising.

Deliverables and Responsibilities

Every pertinent piece of information we are told or glean from the Campaign Planning Study is delivered to FCL's leadership in two forms, the Internal Audit Report and a Campaign Planning Report, which we will present to your board(s) and administration. We don't hold anything back in these reports, which is in both of our interests. Our goal is to be truthful and transparent so that FCL can move into a capital campaign with confidence.

Our **Internal Audit Report** includes findings from interviews with organizational leaders on the following topics:

Rationale	Does the campaign vision, timing and goal resonate with FCL leaders?
Champion	Are these leaders prepared to champion the campaign to their friends, family and peers?
Ability	Do these leaders have the training, tools and personnel to take on the additional responsibilities of a capital campaign?

Our **Campaign Planning Report** combines the information we gather during the Internal Audit and Community Analysis with Campaign Counsel's fundraising expertise. It includes everything necessary to conduct the campaign. Think of it as a detailed blueprint that integrates all the factors that will drive your campaign's success – image, case, leaders, donors, and plan.

Image	Detailed findings on the images of FCL and the FCL Foundation and how they will help or hinder a campaign.
Case	A compelling draft case for support that will motivate potential donors to fund the project.

Leaders	A list of the internal and external leaders who are willing to champion the campaign.
Donors	A list of key donors – individuals, corporations and foundations – that are capable and willing to make leadership gifts to the campaign.
Plan	A comprehensive month-to-month campaign plan for FCL to utilize in reaching its campaign goal.

The report includes two additional valuable deliverables:

- Foundation Research: a list of local, state, and national foundations that are donor prospects.
- Interview Summaries: an overview of all interviews, including self-identified gift intentions, motivations behind those intentions, and willingness to lead.

Campaign Planning responsibilities include:

	FCL	Campaign Counsel
<i>ID interviewees</i>	X	X
<i>Provide Library/project background</i>	X	
<i>Schedule interviews</i>	X	
<i>Conduct interviews</i>		X
<i>Prepare interview deck</i>		X
<i>Draft, edit and present reports</i>		X

Key Personnel

For this project, FCL will work with Kevin Wallace and Martavia Wynn. Their responsibilities are to listen, learn, teach, empower and lead your organization through all phases of its planning study.

Kevin Wallace, President and Partner

- 20 years of capital campaign experience
- Founded Campaign Counsel in 2003
- Education: BA from Southern Methodist University and MBA from Thunderbird School of Global Management
- Based in southern Arizona

Martavia Wynn, Consultant

- 14 years of nonprofit major gifts and donor development experience

- 3 years assisting with capital campaign planning and management
- Education: BS from University of Georgia
- Based in Athens, Georgia

Project Timeline

We limit neither the length nor the number of interviews we conduct during our Campaign Planning Study. Studies are generally completed within four to six months.

Budget

Campaign Counsel charges a \$30,000 fee for the Campaign Planning Study. The fee does not vary with the duration of the study or with the number of interviews conducted. The first half of the fee is due upon project initiation, and the second half is due after the Internal Audit is complete.

In addition, we charge \$300 per diem for every day a consultant is on site or traveling to or from the Kalispell area. The per diem covers all travel-related expenses, such as air fare, rental car, lodging and meals. We will conduct interviews in-person and/or virtually. There is no per diem associated with virtual meetings. We encourage most clients to budget for 24 travel days and per diem charges of \$7,200. There may be an opportunity to decrease the number of days we are on site by utilizing virtual meetings for some interviews. We would not want to eliminate all on-site visits, as some are important to our process.

Our clients are under no obligation to utilize our services beyond the Campaign Planning Study. In fact, FCL will have all the information it needs to conduct a capital campaign once the final report is delivered. In most cases, however, clients retain our services under a separate contract to manage their capital campaigns.

Our Goal: FCL's Success

Campaign Counsel's goal is to position the FCL for success as you test the philanthropic support for a new library in Kalispell. You are taking the important first step: to search for the best consulting group to be your partner in planning a significant campaign for your region.

Campaign Counsel is the best choice because:

- We have led planning studies and capital campaigns for 13 libraries across the country and understand their unique fundraising challenges.
 - Four of these clients – Billings, Missoula, Lake County and Big Fork – have new and/or improved libraries in Montana.

- Having led FCL's Planning Study in 2016, our team has developed relationships and valuable insight into the region's philanthropic interests and capacity.
- Our experience leading library planning studies has taught us that they often require specialized insight and refinement before a library's vision aligns with that of prospective donors. Our team has this experience not only in Montana but throughout the nation.
- Our campaign planning and management fee schedules are affordable and flexible, while our deliverables are the most thorough on the market.

Furthermore, this is a wonderful project. Libraries are, in our opinions, the greatest equalizers in our country; they provide everyone, regardless of their background, access to information, technology and knowledge. They are a place of refuge and celebration, and we are always happy to help them achieve their greatest capacity!

If you or your board have questions about the proposal or the campaign process, we are happy to answer them during an in-person or virtual meeting. If this proposal meets your capital campaign planning and management needs and FCL leadership wishes to contract with Campaign Counsel, please let me know so we can send you a formal contract for review.