Considering a Capital Campaign? Implications for Fundraising and Finances

May 16, 2024

HELLER FUNDRAISING GROUP

Revised

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Session CPE Requirements

- You need to attend 50 minutes to receive the full 1 CPE credit.
- There will be 4 knowledge check questions throughout the presentation. You must respond to a minimum of 3 to receive the full 1 CPE credit.

Both requirements must be met to receive CPE credit

Speaker Introductions

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Agenda

Elements of a capital campaign

Feasibility Study

Accounting for your campaign

Cash flow of campaign

Choosing a consultant

Learning Objectives

01

Identify various ways “capital campaign” is used and what they can mean

02

Recall how and where a capital campaign strategy can be effective

03

Recognize the financial considerations when structuring, messaging, and accounting for a campaign

04

Identify additional financing strategies for capital projects (IRA credits, TIF, NMTC, and more)

Creating Opportunities for Our Clients

Updated January 2024

218,000+
Active clients

128,000+
Private households served

56,100+
Private businesses served

11,100+
Nonprofit organizations served

3,100+
Government organizations served

620+
Higher education organizations served

4,500+
Financial institutions served

10,900+
Health care organizations served

7,700+
Clients engaged in global capabilities

1,200+
Clients engaging employee benefit plan capabilities

52,100+
Clients engaging outsourcing capabilities

7,600+
Clients engaging wealth advisory capabilities

14%
Organic growth
(preliminary number)

Heller Fundraising Group

Located in NYC with clients everywhere

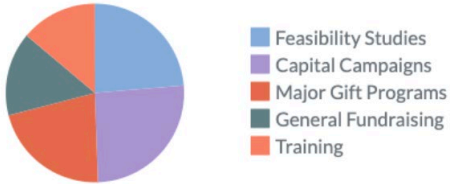
Our Mission

We build abundance for our nonprofit clients through customized consulting and training for successful capital campaigns, insightful feasibility studies, and prosperous major gift programs.

About Us

Founded in 2004
5 Staff
20 collaborating consultants
120 + nonprofits supported
$1.07 billion in client campaigns

Areas of Expertise



Sectors

Education
Social Justice
Religious Organizations
Social Services
Medicine
The Arts
Scientific Research

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A Capital Campaign

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Capital Campaign Defined

A capital campaign is a focused effort to raise money above and beyond regular operating expenses. It usually happens over a period of years and when done effectively can galvanize attention on the future of the community.*

*note: not “the future of the organization.”

It’s never about the new building.

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Poll Question 1

How likely are you to launch a capital campaign in the next 3 years?

- Very likely
- Likely
- Unlikely
- Very Unlikely

Capital Campaign Misconceptions

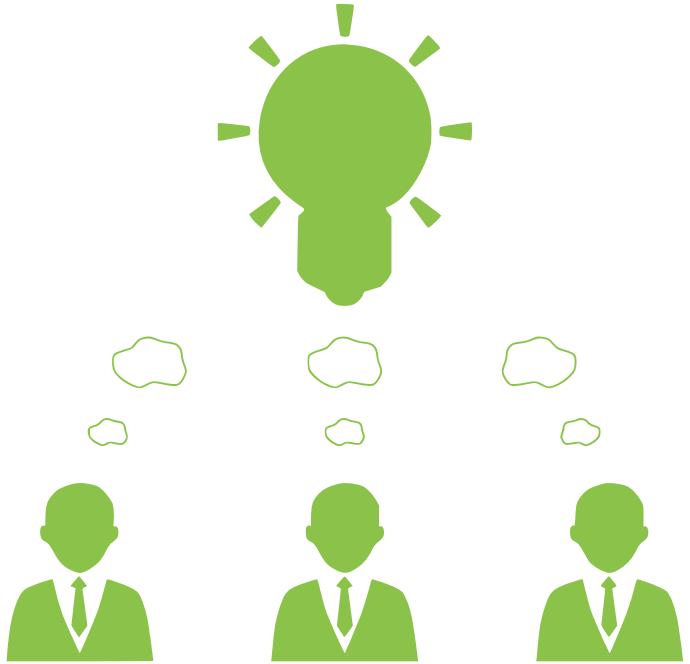
Purpose is only for building and/or equipment

Only used by Large organizations

Need wealthy board members

Bad Reasons for a Campaign

- An organizational anniversary (25th year)
- We like the idea of owning a building
- A board member suggests it
- Nothing to do this weekend



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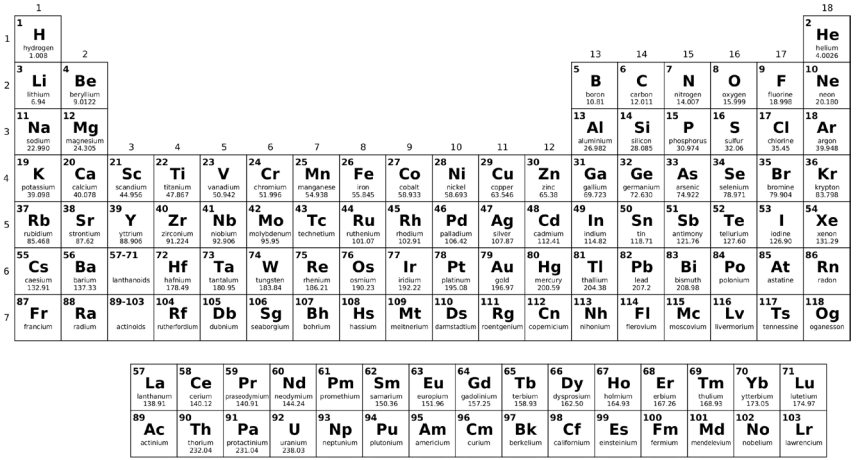
Six Elements of a Successful Campaign

1. Dollar Goal
2. The Case for Support
3. Prospects
4. Campaign Committee
5. Systems and Staffing
6. Timing



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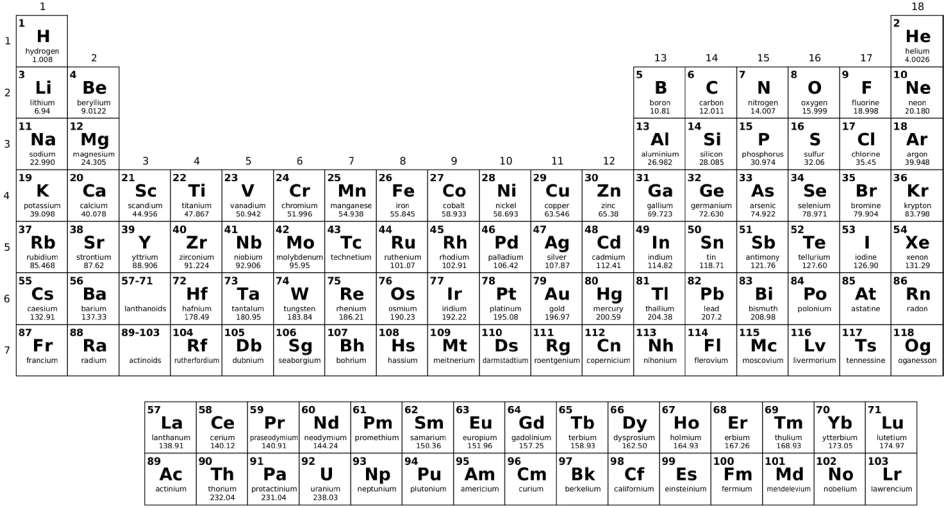
Six Elements of a Successful Campaign

Element 1: Dollar Goal



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3	11 Na sodium 22.990	12 Mg magnesium 24.305	3	4	5	6	7	8	9	10	11	12	13 Al aluminium 26.982	14 Si silicon 28.085	15 P phosphorus 30.974	16 S sulfur 32.06	17 Cl chlorine 35.45	18 Ar argon 39.948
4	19 K potassium 39.098	20 Ca calcium 40.078	21 Sc scandium 44.956	22 Ti titanium 47.867	23 V vanadium 50.942	24 Cr chromium 51.996	25 Mn manganese 54.938	26 Fe iron 55.845	27 Co cobalt 58.933	28 Ni nickel 58.693	29 Cu copper 63.546	30 Zn zinc 65.38	31 Ga gallium 69.723	32 Ge germanium 72.630	33 As arsenic 74.922	34 Se selenium 78.971	35 Br bromine 79.904	36 Kr krypton 83.798
5	37 Rb rubidium 85.468	38 Sr strontium 87.62	39 Y yttrium 88.906	40 Zr zirconium 91.224	41 Nb niobium 92.906	42 Mo molybdenum 95.95	43 Tc technetium	44 Ru ruthenium 101.07	45 Rh rhodium 102.91	46 Pd palladium 106.42	47 Ag silver 107.87	48 Cd cadmium 112.41	49 In indium 114.82	50 Sn tin 118.71	51 Sb antimony 121.76	52 Te tellurium 127.60	53 I iodine 126.90	54 Xe xenon 131.29
6	55 Cs caesium 132.91	56 Ba barium 137.33	57-71 lanthanoids	72 Hf hafnium 178.49	73 Ta tantalum 180.95	74 W tungsten 183.84	75 Re rhenium 186.21	76 Os osmium 190.23	77 Ir iridium 192.22	78 Pt platinum 195.08	79 Au gold 196.97	80 Hg mercury 200.59	81 Tl thallium 204.38	82 Pb lead 207.2	83 Bi bismuth 208.98	84 Po polonium	85 At astatine	86 Rn radon
7	87 Fr francium	88 Ra radium	89-103 actinoids	104 Rf rutherfordium	105 Db dubnium	106 Sg seaborgium	107 Bh bohrium	108 Hs hassium	109 Mt meitnerium	110 Ds darmstadtium	111 Rg roentgenium	112 Cn copernicium	113 Nh nihonium	114 Fl flerovium	115 Mc moscovium	116 Lv livermorium	117 Ts tennessine	118 Og oganesson

57 La lanthanum 138.91	58 Ce cerium 140.12	59 Pr praseodymium 140.91	60 Nd neodymium 144.24	61 Pm promethium	62 Sm samarium 150.36	63 Eu europium 151.96	64 Gd gadolinium 157.25	65 Tb terbium 158.93	66 Dy dysprosium 162.50	67 Ho holmium 164.93	68 Er erbium 167.26	69 Tm thulium 168.93	70 Yb ytterbium 173.05	71 Lu lutetium 174.97
89 Ac actinium	90 Th thorium 232.04	91 Pa protactinium 231.04	92 U uranium 238.03	93 Np neptunium	94 Pu plutonium	95 Am americium	96 Cm curium	97 Bk berkelium	98 Cf californium	99 Es einsteinium	100 Fm fermium	101 Md mendelevium	102 No nobelium	103 Lr lawrencium

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Element 1: Dollar Goal

Campaign Objective	Projected Expense
Build a new Small Sanctuary	$4,100,000
Redesign/Add School and Youth Spaces	$3,950,000
Improve Meeting and Social Spaces including Accessibility Enhancements	$3,125,000
Expand Clergy/Administrative Offices and Meeting Rooms	$2,675,000
Improve Parking and Landscaping	$2,150,000
TOTAL CAMPAIGN BUDGET	**$16,000,000**

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Campaign Project Example

Strengthen today	
Debt retirement	$3.6 million
Strategic growth	$3.4 million
Annual support	$5.0 million

Invest in tomorrow	
Property renovation	$1 million
Endowment growth	$3 million
Total campaign goal - $16 million	

Element 1: Dollar Goal

GIFT TABLE for a $5,000,000 GOAL				
Gift Level	**Target # Gifts**	**Prospects Needed**	**Total Goal**	**Total $ by Level**
LEADERSHIP GIFTS (+)				
$1,000,000	1	3	$1,000,000	
$500,000	3	9	$1,500,000	
$250,000	4	12	$1,000,000	
				$3,500,000
MAJOR GIFTS (+)				
$100,000	4	12	$400,000	
$50,000	6	18	$300,000	
$25,000	10	30	$250,000	
				$950,000
COMMUNITY GIFTS (+)				
$10,000	20	40	$200,000	
$5,000	30	60	$150,000	
<$5,000	Many	Many	$200,000	
				$550,000
TOTAL	**78**	**184**	**$5,000,000**	

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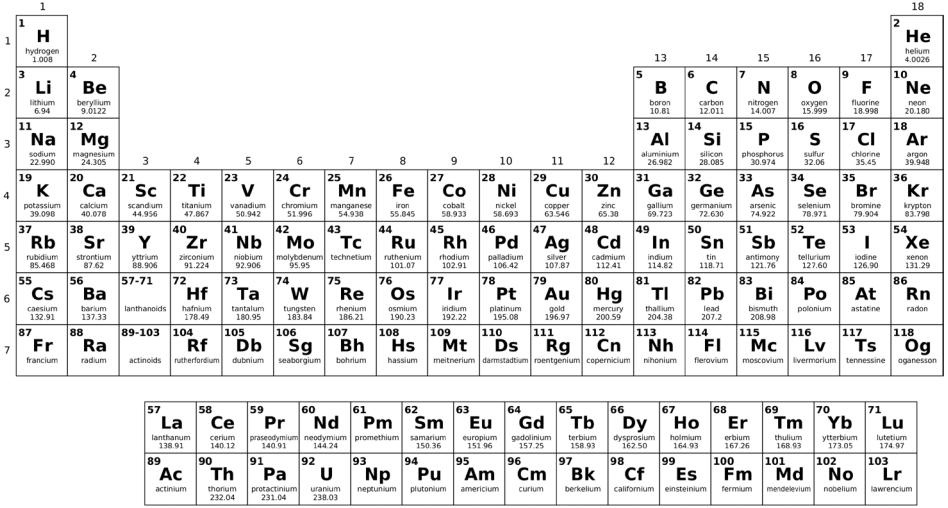
Budget Items to Consider

- Acquisition costs
- Construction and contingency
- Design and Architecture
- Soft costs (legal and consultants)
- Funding sources other than philanthropy
  - Public grants
  - New market tax credits
- Estimate of equipment and infrastructure costs
- Inflation factor
- Financing costs
  - Cover timing of pledge payments
  - Budget for potential interest

Six Elements of a Successful Campaign

Element 2: The Case for Support



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Element 2: The Case for Support

Parts of the Case

- Vision for the Future
- The Problem
- Your Nonprofit's Solutions
- Your Nonprofit's Accomplishments, History, Data Points
- The Campaign Budget
- (Call to Action)

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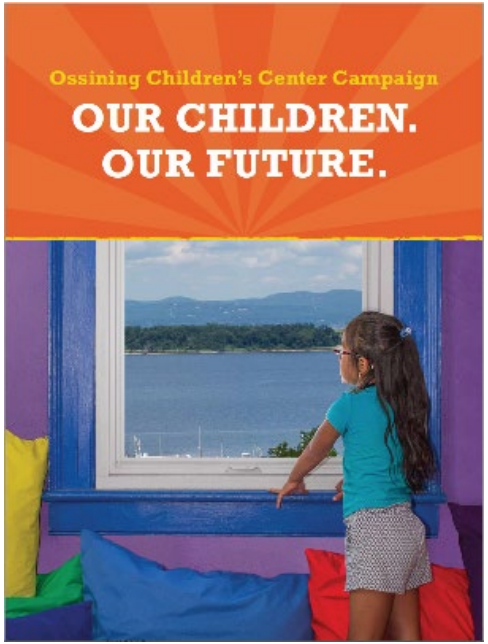
Element 2: The Case for Support



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Element 2: The Case for Support

OUR VISION

Every child deserves the chance to blossom. And children blossom when their families thrive, which strengthens the entire community. For over 120 years, the Ossining Children's Center has played a vital role in this extraordinary process – helping children realize their fullest potential and advocating for families in a vibrant community. With your support, let's help more and more children and their families flourish, for the benefit of us all.

"The Ossining Children's Center opens opportunities for children to become lovers of learning, and for families to flourish as contributing members of our community. OCC is one of Ossining's great community resources."

— Hon. Sandra R. Galef,
New York State Assemblymember, District 95

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Element 2: The Case for Support

Our Children. Our Future.

Imagine a society that focuses its best resources on its children. Their well-being. Their health. Their development. Their growth into productive adulthood.

You might think this describes affluent Montebello County. But somehow, there's no guarantee of a strong and supportive start in life.

In fact, many parents are struggling. Working hard just to get by, they cannot, for example, find or afford the kind of early child care that provides the emotional support and education their children need. And their grade school-age kids need the recreation, enrichment, and homework help that working parents often can't provide after school.

Many working parents are forced to leave their young children in sub-standard, even unsafe, child care situations, often with unlicensed baby-sitters. And without after-school programs, many older children become unsupervised "latch key" kids.

A RISKY FUTURE?

As a result, too many children enter kindergarten without the experiences that nurture optimum brain development and the sense of well-being gained from quality child care. And too many grade-schoolers are being left behind in this appropriate supervision and resources. Without this solid foundation, these students are at a greater risk of not meeting their potential in life – a loss for them, their families, and our entire community.

Child care experts and many studies that track low-income children through adulthood confirm that attending a good preschool increased career achievement and reduced the need for remedial education, welfare assistance, or criminal justice system interventions.

OR A BETTER SOLUTION.

Children have a much better chance for a bright future when they start with a positive preschool experience, and when they're supported with fulfilling before- and after-school programs. Since we know what works, can't we do all of us to provide support so that for children to succeed?

Please read on to learn how the Channing Children's Center — serving children admirably since 1886 — meets these challenges today, addresses the forces that threaten the center's existence, and plans to build the strong, sustainable future we envision for the children of our community.

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Element 2: The Case for Support

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Element 2: The Case for Support

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Element 2: The Case for Support

INTRODUCTION

There are moments in an institution's history that define its very existence. These are moments when challenges are turned into opportunities, when progress becomes greatness, and when dreams are transformed into reality. For [redacted], that moment is now.

As the Academy approaches its Centennial year, we are evermore committed to providing each student an outstanding opportunity to achieve academic excellence in an environment that values wisdom and nurtures personal, community, and global responsibility.

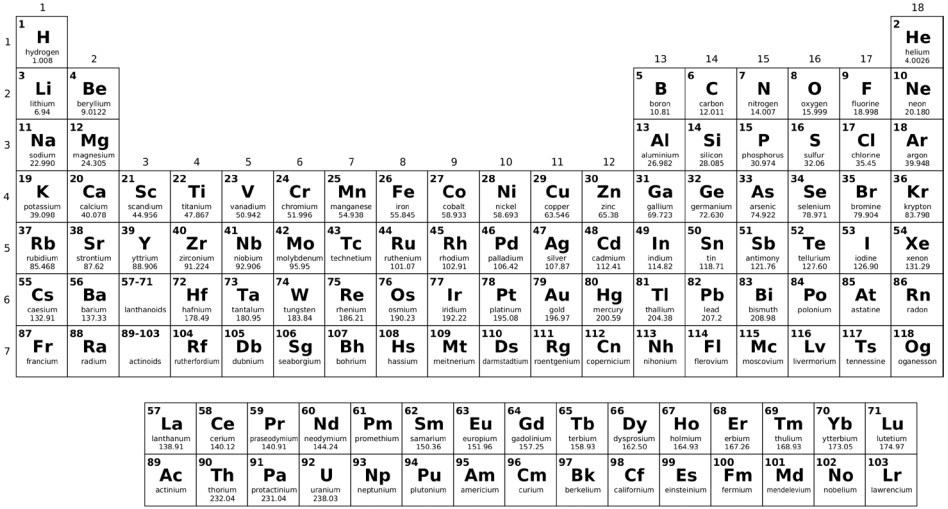
We have the opportunity to make a transformational difference – one that will enhance our deep-rooted commitment to offering the best possible education to a community of talented and motivated students. What we do **Today** will have a direct and lasting impact on where we are **Tomorrow**. To ensure that our future is as bright as our present, we are launching *The Centennial Campaign* to celebrate our 100th year and to ensure that we thrive for generations to come by addressing three primary objectives:

- Academic Excellence and Faculty Development
- Facility Enhancement to support the progressive demands of today's educational environment
- School Endowment to create sustainable funding for continued growth

Our minimum goal for this effort is $3,000,000 to be raised with the support of our alumni, parents, faculty, and friends.

Six Elements of a Successful Campaign

Element 3: Prospects



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Element 3: Prospects

Are there enough?

How to evaluate them (wealth screening, rating sessions, donor data)?

Where to get more? (Natural Networks)

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Element 3: Prospects

Revisiting the Gift Table: Do I have enough prospects to reach my goal?

GIFT TABLE for a $5,000,000 GOAL				
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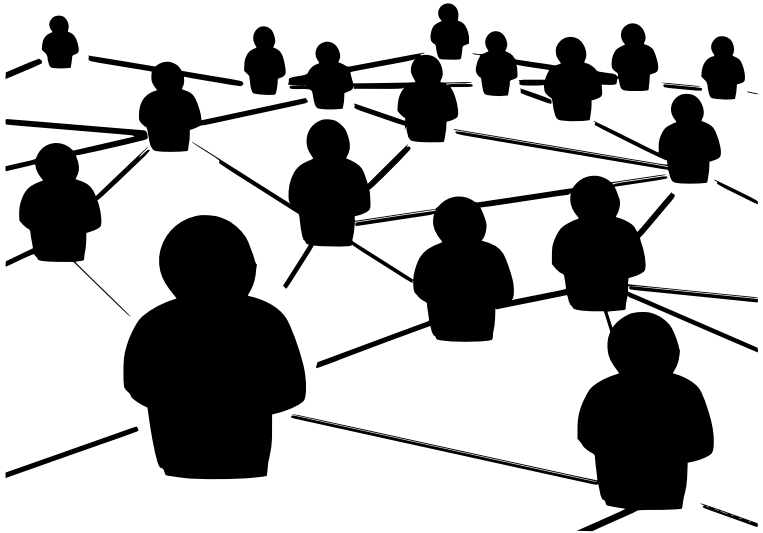
Element 3: Prospects

Natural Networks

- Top Donors
- Board Members
- Advisory Board Members
- People Connected to My Mission
- Business Associates
- Friends/Neighbors
- My Rich Uncle/Other



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Elements 3: Prospects

Top Prospect Report

Next Step Date	Last Contact Date	Last Name	First Name	Connection	Next Step	Target $ Ask	Notes/Comments
12/15/2018	12/1/2018			Friend of Mrs. X	call Mrs. X to discuss strategy	$ 10,000	underwrite lecture
12/19/2018	11/1/2018			Donor	annual appeal letter	$ 25,000	cultivate for board committee
1/10/2019	11/15/2018			Foundation	staff discussion	$ 10,000	new program support
1/12/2019	11/30/2018			Potential Donor	invite to our event	$ 50,000	endowment prospect
1/16/2019	11/15/2018			Board Member	call Board Chair to discuss	$ 100,000	potential major donor
1/20/2019				Local Business	send letter of introduction	$ 10,000	cultivate for board
1/30/2019	12/1/2018			Longtime Major Donor	invite for lunch	$ 50,000	thank her/tell her about our plans for 2019

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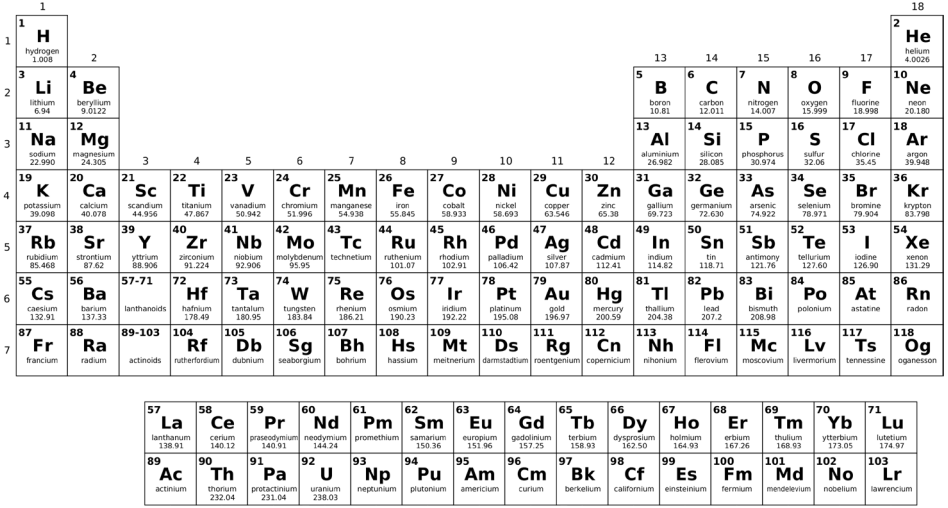
Six Elements of a Successful Campaign

Element 4: Campaign Committee



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Element 4: Campaign Committee

Structure

- 2 – 3 Co-Chairs
- 10 – 15 Members total
- Honorary Co-Chairs

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Element 4: Campaign Committee

Purpose:

- Oversee campaign
- Engage in Fundraising

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Other Considerations

- Building/real estate/construction committee
- Owner's rep
- Public relations/government consultant
- Legal counsel

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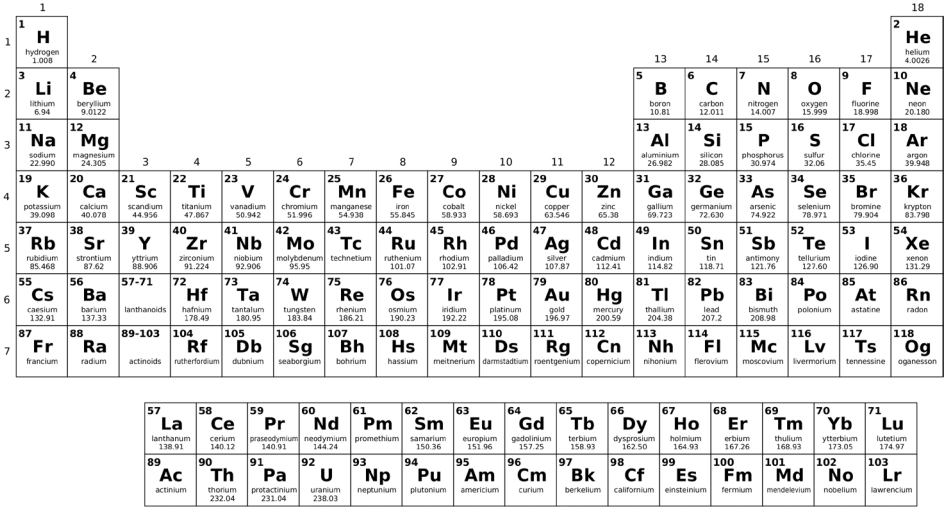
Element 5: Systems and Staffing



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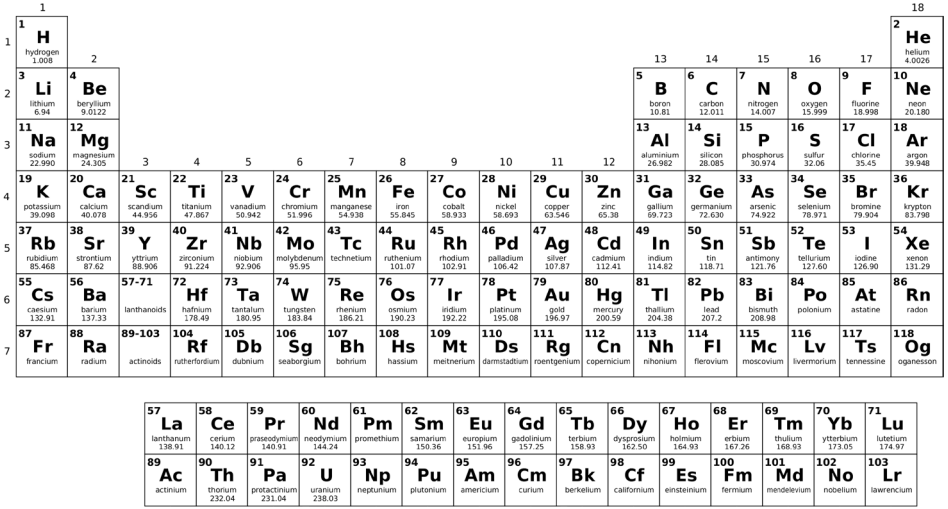
Systems – What is needed?



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Element 5: Systems and Staffing

Systems

- Fundraising database actively managed; gift tracking
- Monthly reconciliation between gift income and finance data
- Gift acceptance and donor recognition policies
- Gift agreement letter
- Time management
- Task management
- Development office and organization communication systems
- Culture of philanthropy

Element 5: Systems and Staffing

Monthly/Annual Metrics

SAMPLE MONTHLY METRICS																
FUNDRAISING MEETINGS*													**ANNUAL TOTAL MTGS**	**# SOLICITS ANNUAL**	**# GIFTS ANNUAL**	**$ ESTIMATE ***
YEAR 1	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC				
Modest Effort	0	0	0	0	4	4	4	4	4	4	4	4	32	11	5	$50,000
Energetic Effort	0	0	0	0	8	8	8	8	8	8	8	8	64	21	11	$150,000
Dedicated Staff	0	0	0	0	4	4	4	4	13	13	13	13	68	23	12	$160,000
YEAR 2	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC				
Modest	4	4	4	4	4	4	4	4	4	4	4	4	48	24	12	$150,000
Energetic	8	8	8	8	8	8	8	8	8	8	8	8	96	48	24	$320,000
Dedicated Staff	13	13	13	13	13	13	13	13	13	13	13	13	156	78	39	$450,000
YEAR 3	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC				
Modest	4	4	4	4	4	4	4	4	4	4	4	4	48	24	12	$200,000
Energetic	8	8	8	8	8	8	8	8	8	8	8	8	96	48	24	$450,000
Dedicated Staff	13	13	13	13	13	13	13	13	13	13	13	13	156	78	39	$600,000

** Gift amounts in the first year are $10,000. In the 2nd & 3rd years, a combination of $10,000, $25,000, $50,000 and $100,000.*

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Element 5: Systems and Staffing

Staffing

- Is there ever enough?
- What's the current fundraising staffing?
- What's needed for a successful campaign?

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Poll Question 2

Can fundraising costs be capitalized?

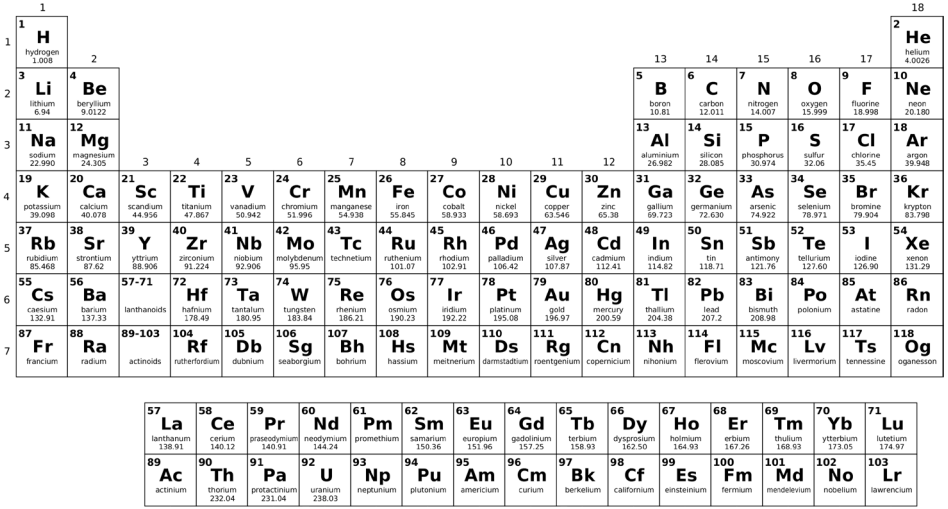
- Yes
- No

Accounting For Your Campaign

- Donation tracking
  - Restrictions
  - Inkind
- Pledge commitments discount
- Capitalization of costs
  - Construction
  - Interest
  - Overhead
- Release of restriction

Six Elements of a Successful Campaign

Element 6: Timing



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Element 6: Timing

What factors do I need to consider regarding timing?

- Renovation needs?
- Property purchase?
- Urgent program needs?
- Other?

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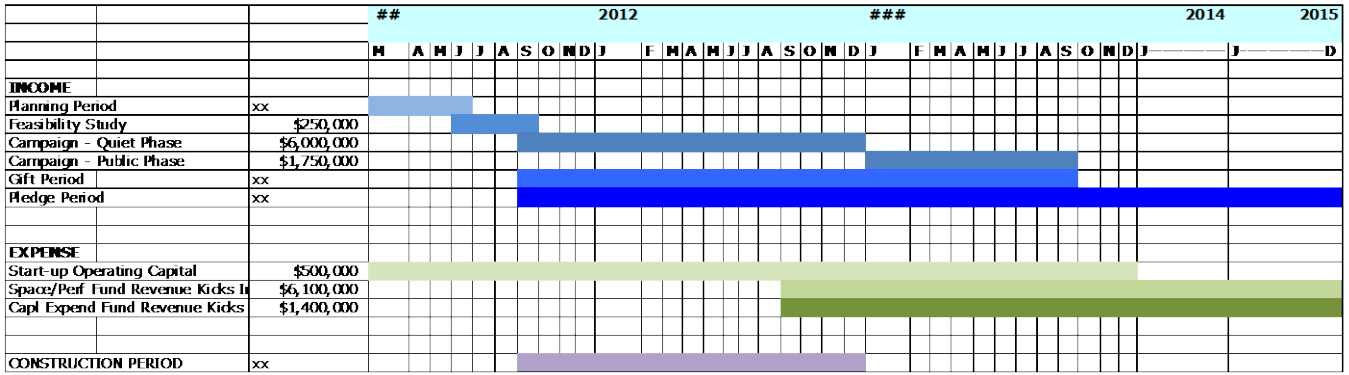
Element 6: Timing



		##	2012	###	2014	2015
		M A M J J A S O N D	J F M A M J J A S O N D J	F M A M J J A S O N D J	J	D
INCOME						
Planning Period	xx					
Feasibility Study	$250,000					
Campaign - Quiet Phase	$6,000,000					
Campaign - Public Phase	$1,750,000					
Gift Period	xx					
Pledge Period	xx					
EXPENSE						
Start-up Operating Capital	$500,000					
Space/Perf Fund Revenue Kicks In	$6,100,000					
Capl Expend Fund Revenue Kicks	$1,400,000					
CONSTRUCTION PERIOD	xx					

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Cash flow

- Set goal of funds to be raised prior to groundbreaking (if campaign is for new building)
- Debt considerations
  - Timing of pledge payments
  - Funding of project through debt
    - Likely will need projections for bankers

Poll Question 3

- Do you have the resources and skills on your finance team to support a capital campaign?
  - Yes
  - No
  - Maybe

The Capital Campaign Feasibility Study

or

“Planning Study”

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The Capital Campaign Feasibility Study

Why do it?

- Determine how much money can be raised
- Determine community and donor interest in project
- Build and test a strong case for support
- Begin cultivation of top donors
- Determine when to start your campaign, how much it will cost and required staffing
- Get fundraising campaign engine in working order

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The Capital Campaign Feasibility Study

Outcomes

- 15-60 interviews
- Lots of notes on the Case
- Reality check on $$
- Reality check on excitement factor
- Report to the board on findings, recommendations and next steps

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Poll Question 4

Did you find the information in this CLA webinar helpful to you and your organization or business?

- Yes
- No

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Thank you!

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