

Capital Campaign Report Committee

Notes from Meeting on 7/13/17 – Considerations for Greenville County report

Attendance: Gina Blohm, Community Foundation; Laura Caligan, Graham Foundation; Jamie Inman, YMCA; George Maynard, Accordant Philanthropy; Kim Pitman, Greenville Humane Society; Sean Rusnak, Piedmont Health Foundation; Katy Smith, GPP; Susan Stall, FW Symmes Foundation

General thoughts and feedback from committee members

- Capital campaign report and related work are part of the larger effort to build capacity of nonprofits and funders
- Training for nonprofits would be beneficial – be sure they don't put the cart before the horse with a campaign
- Our community is known to have a strong propensity to give and volunteer, and this can be part of creating an *educated* community in doing so
- Nonprofit staff and boards – even seasoned ones – may go a whole career without doing a capital campaign, so it's to be expected that basic knowledge is needed
- Purpose of this project is primarily donor-centric, although will help nonprofits, too

Specific thoughts on capital campaign report attributes

- **Target audience** – while the report will be helpful to nonprofits, the consensus was that funders should be considered as the target audience.
- **Time Frame** - On-going. Committee felt it was important to have information as real-time as possible, so an online resource that could be updated as needed would be ideal. However, the process or system should also allow for information on time periods to be captured (e.g. what campaigns were underway in a particular year or quarter)
- **Participation** – there wasn't yet consensus on whether participation should be incentivized or required. If required, the enforcement would be through funders themselves (e.g. funders might require applicants to participate in report before they would consider an application). If incentivized, need to develop the “lever” for participation. Katy will consider this further and present options at next meeting.
- **Scope**
 - Geographic – focused on funders in Greenville County, so will consider things that they might give to, which would include nonprofits and churches located here as well as area universities and health care systems
 - Purpose – any non-recurring fundraising, such as building campaigns, scholarship, endowment, or program-launch

- **Fields** – potential fields include:
 - Org name, org type (arts, health, education, human services)
 - Agency operating budget
 - Campaign description
 - Area served
 - Goal
 - Campaign start date
 - Target end date
 - Raised as of (date)
 - Contact person
 - Campaign status (considering, silent, active, closed/completed)
 - Actual project costs
 - Whether project master plan exists
 - % to be pledged vs. debt
 - % goal to be reached before construction begins

- **Format** – interactive online report using Engenius template (same as will be used for funder directory)

- **Accessibility** – Free to all

- **Other**
 - Develop capital campaign readiness audit – require it of participants
 - Offer periodic capital campaign training for staff as well as board members or volunteer campaign leadership.
 - Whether and how to provide confidentiality to respondents (are all fields required? Is org name hidden during silent phase?)
 - How to develop and promote
 - Engage more nonprofits during this phase of consideration?
 - Roll out in an event or existing meeting such as NPA?
 - Pilot survey with current capital campaigns?

Next steps

- Staff will research capital campaign readiness audits and trainings from other communities and associations
- Staff will develop a potential approach for this process, including how to:
 - Identify potential campaign participants
 - Incentivize or require their participation
 - How to develop technical infrastructure
 - How to promote it to funders and engage their participation in incentivizing or requiring participation