



INSPIRE

"INSPIRE NOW AND FOR ETERNITY"

A CAMPAIGN FOR COLLEGEDALE ACADEMY

Planning for the Future – Capital Campaigns

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Collegedale Academy



Collegedale Academy – A brief history

Collegedale Academy (CA) was founded in 1892 as the Graysville School in Graysville, TN. Later, the name was changed to Southern Training School, and in 1916 it was moved to its present location at Collegedale, Tennessee, where it reopened as Southern Junior College.

Collegedale Academy has a rich history with the constant focus of providing a strong Seventh-day Adventist Education serving the Chattanooga, Cleveland, and North Georgia areas for Early Childhood Education through 12th grade students.







Objective

Introduce and explain capital campaign fundraising in a way that is clear, useful, and engaging.

Theme for this week is *Navigating the Future, Fulfilling Mission* - Capital Campaigns fit perfectly into this theme. Today we will review how your organization can fulfill the mission through large gifts in a capital campaign.

➤ **Background:** After years of planning, Collegedale Academy is moving forward in faith and has initiated the *Inspire Now and for Eternity* capital campaign to build a new elementary building. The effort to raise millions for a new facility is a bold and visionary goal that will impact thousands of students over several decades.

Today, I am excited to share the process that our team is taking by implementing a Capital Campaign to meet this challenge. Ultimately to ensure that Collegedale Academy will continue to remain strong, responsive, and successful in the years to come.

How to Fund for Capital Improvements – Best Practices

- First and foremost, budget and fund depreciation expense annually
 - Operating Budget should cover an estimate of depreciation costs
 - Minimum – Furnishings/Equipment and Land Improvements
 - Optimal – Building Depreciation as well

- Transfer monthly depreciation expense from Operating Fund to Plant Fund
 - Institutional Discipline
 - Consider Allocating Transfer to specific uses
 - Technology
 - Renovations
 - Physical Plant – HVAC, Roofs, etc.

- Operating Surplus
 - Contingency



We have funded our depreciation but need to invest in a large capital project – what do we need to do?

Capital Campaigns are the answer!

➤ **A Capital Campaign is:**

- A periodic, carefully organized, highly structured fundraising program.
- It uses volunteers supported by staff and consultants to raise funds for *specific needs* to be met in a *specific time frame*, with a *specific dollar goal* that allows donors to pledge gifts to be paid over a period of years.



Types of Capital Campaigns



➤ Bricks & Mortar Campaign or Traditional Capital Campaign

- These campaigns raise money for a specific tangible project (new construction, renovation to existing facility, and/or equipment purchases)

➤ Endowment Campaign

- Funds raised create and/or add to the organizations “capital” investment fund from which income is earned to support programs designated by the policies of the governing board.

➤ Combined Campaign

- Brings together all the organization’s needs for buildings, equipment and endowment for a specified number of years under one fundraising umbrella.

➤ Comprehensive Campaign

- Combines the goals of a capital campaign with the goals of the annual campaign.





Six Essential Campaign Best Practices

1. **Sequential Solicitation** – largest gifts are solicited and committed before the smaller gifts.
2. **Volunteer Involvement** – Quality campaign volunteers are key in the success.
3. **Reliance on Lead Gifts** – Raise more than half of your goal from 10 – 15 donors. Without these gifts, the campaign will not succeed.

Six Essential Campaign Best Practices

4. **Quality over Quantity** – Gifts will come from loyal regular donors. Seldom do they come from uninvolved, new prospects.

5. **Face-to-Face Solicitation** – Major gifts are raised through face-to-face solicitations.

6. **Multi-Year Pledges** – Campaigns provide opportunities for people to make pledges over more than one year.

Campaign Phases

The anticipated **active** of CA's campaign period is about 24 months: October 2022 – December 2024. The campaign plan identifies five phases as below. A more detailed timeline with activities will follow:

- **Phase I** – Pre-Campaign Planning: 2019 - 2021
- **Phase II** – Campaign Planning/Cabinet/Cornerstone Gift: February 2022 – August 2022
- **Phase III** – Quiet Phase: October 2022 – August 2023
- **Phase IV** – Public Phase: August 2023 – December 2024
- **CELEBRATE!** December 2024 – We have accomplished our fundraising goal!
- **Phase V** – Finalize & Follow-Through – December 2024 – July 2025



Campaign Timeline and Flow

QUIET PHASE: Raising 60-80% of Goal

PUBLIC PHASE



Pre-Campaign Planning – Phase I

Planning takes place in two phases. Staff and key volunteers determine the basic elements needed to test the feasibility of the project, including:

1. Clarify Campaign Objectives
2. Estimate the Working Goal for Project
3. ID and engage prospects
4. Engage Leaders
5. Select Consultant (if applicable)
6. Conduct Feasibility Study to assess readiness by interviewing donors to achieve a recommended plan.
7. Draft Case for Support (example to follow)
8. Draft Gift Range Chart (example to follow)



SAMPLE Case For Support: Christian Education: One of our Greatest opportunity for Evangelism that our Church Offers

➤ Elementary school is the "Front Door" of our entire church and educational system. If we do not attract the families into our elementary school, they are less likely to attend and Adventist college or be active in a SDA church. This is where beliefs and habits are formed, developed, and set for eternity. **We must make the Front Door as welcoming as possible so that we reach as many families as possible.**

➤ John Wesley Taylor V, associate education director of the Seventh-day Adventist Church says, *"Adventist education is the longest and largest evangelistic event in the Seventh-day Adventist Church. [A young person] who does not attend an Adventist school is 13 times more likely never to join the church if he or she does not receive Adventist education."*

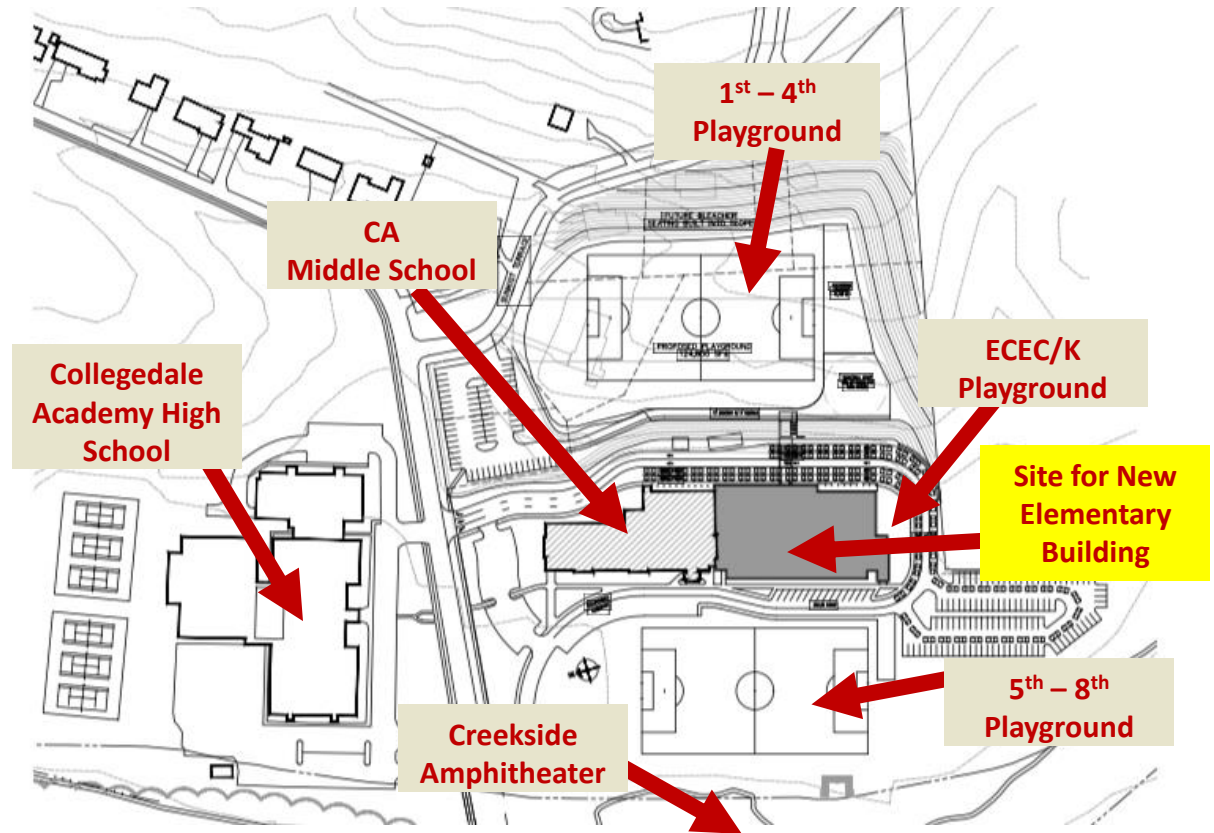
Source: presentation given to the General Conference Executive Committee (EXCOM) on April 14, 2021



SAMPLE Case for Support: Our Vision for the Elementary Facilities

First Phase of CA's Master Facility Plan: Construction of the Elementary Building – Multi-Million Investment

- This vision of a newly unified, single campus for our E-8 students will help further our mission for every student by allowing greater interaction between grade levels. This will bolster CA's continued commitment to excellence and innovation.
- Ultimately this plan enhances CA's ability to provide discipleship, academic rigor, and integrity to our students in a Christ-like and inspiring environment.



SAMPLE Case for Support: Join Us!

We believe this vision of a newly unified, single campus *will enhance our mission for every student. It will fortify CA's commitment to excellence.* A single campus will support our faculty and staff as they endeavor to provide an inspiring environment to advance student success.

To help fund this extraordinary advancement, Collegedale Academy now seeks substantial support in the form of gifts and pledges to the *Inspire Now and for Eternity* Campaign.

We invite you to join with us to help make the vision a reality.

- Philanthropic support is crucial to this project. It will provide a margin of excellence not otherwise possible.
- Gifts may be outright or paid over three to five years.
- Your commitment to the campaign will help ensure a future with the continued high-quality education our community, families, and children deserve.
- A leading gift from you will help inspire others to join in this vital cause.



SAMPLE Case for Support: Message from the Campaign Chair

Collegedale Academy (CA) is at the very heart of our community. Just as CA (previously Graysville School and the Southern Training School) preceded and provided the foundation on which Southern Adventist University is built, so today CA precedes and provides the foundation on which students build their future education and their contributions to society.

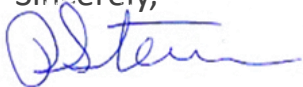
Our ECEC – 4th grade education is the crucial first stage of that building process. It is essential that this part of our education keeps up with technological change, provides the environment to capture the imagination, and inspires a hunger for learning and growth. With those building blocks CA attracts the best teachers as well as families who want the best education for their children.

Through the *Inspire* campaign we will be able to:

- Replace an aging building that is not efficient in energy or design;
- Avoid costly repairs and improve safety;
- Include important extras *i.e.* outdoor education, athletics, STEAM, and music;
- Provide healthy food service for growing kids.

Please join me and many others in creating this important foundation for our most precious assets – the children who will lead tomorrow.

Sincerely,



Rick Stern,
Campaign Chair



SAMPLE Gift Range Chart

Typically, lead gift should constitute at least ten to twenty percent of the goal. Forty to sixty-five percent of the goal from the ten to fifteen largest gifts. Forty to fifty percent from the next 100 – 150 gifts and Ten to twenty percent of the goal from all other gifts.

Fundraising GIFT RANGE CHART							
Gift Type	Total	# of Gifts Needed	Prospects	Row Total	Cumulative Total	Gift %	Cum. %
Cornerstone	\$5,000,000	1	4	\$5,000,000	\$5,000,000	20.00%	20.00%
	\$2,500,000	2	8	\$5,000,000	\$10,000,000	20.00%	40.00%
	\$1,000,000	8	32	\$8,000,000	\$18,000,000	32.00%	72.00%
		11	44			72.00%	
Leadership	\$500,000	5	15	\$2,500,000	\$20,500,000	10.00%	82.00%
	\$250,000	6	18	\$1,500,000	\$22,000,000	6.00%	88.00%
	\$100,000	10	30	\$1,000,000	\$23,000,000	4.00%	92.00%
		21	63			16.00%	
Major	\$50,000	11	33	\$550,000	\$23,550,000	2.20%	94.20%
	\$25,000	22	66	\$550,000	\$24,100,000	2.20%	96.40%
		33	99			24.40%	
General	\$10,000	30	90	\$300,000	\$24,400,000	1.20%	97.60%
Board, Faculty, General, Parent, Corp.	\$5,000	50	150	\$250,000	\$24,650,000	1.00%	98.60%
Alumni, Community, & Churches	Below \$5,000	many	1500	\$350,000	\$25,000,000	1.40%	100.00%
		195 +	1740			3.60%	
Total Gifts/Prospects		298+			\$25,000,000		100.00%



Campaign Planning – Phase II

The second phase of campaign planning takes place following a campaign feasibility study and establishes a complete written plan for the campaign.

1. Board approves campaign
2. Enlist campaign committee
3. Determine Working Goal – *This will adjust based upon your feedback from the feasibility study.*
4. Revise Case for Support based upon feasibility study.
5. Donor Recognition Plan
6. Campaign Policies
7. Solicitation Methods
8. Campaign Structure
9. Campaign Timetable
10. Gift tallying, record-keeping and billing
11. Campaign Budget
12. Campaign Reporting



Phase III – Quiet Phase

Building the Nucleus Fund – The Quiet Phase

- Secure funds from those closest to the organization before going public by soliciting top down/inside out:
 - Solicit Cornerstone Gift – largest gifts
 - Solicit campaign committee
 - Solicit Board
 - Solicit Faculty
 - Solicit Leadership - Pace-setting Gifts
- Plan Campaign Kick-off



Quiet Phase – Donor Activity (use your Gift Range Chart)

Cornerstone Gifts: April 2022 through January 2023

1. The solicitation of the single Cornerstone gift for commitment of \$5,000,000 plus \$2,50,000 (2x) and \$1,000,000 (8x).

Leadership Gifts Division: February 2023 through June 2023

1. The solicitation of 75+ leadership gift prospects for 20 gift commitments of \$500,000 (5x), \$250,000 (6x), and \$100,000 (10x).

Board Division: September 2022 through January 2023

1. The Solicitation of all members of the Board of Trustees
2. Participation Goal:100%

Faculty and Staff Division: February 2023 through April 2023

1. The Solicitation of all faculty and staff
2. Participation Goal: 60%



Phase IV - Public Phase

The Public Phase

➤ A campaign 'goes public' once the nucleus fund has been raised from lead gifts and after the organization's "family" has been solicited. Several elements must be in place prior to the public announcement:

- The lead gifts should be committed.
- The official campaign goal must be determined.
- The campaign brochure should be completed.
- The volunteer solicitors should be ready to make their calls.
- The project plan should be solidified.



Public Phase – Donor Activity

Major Gifts Division: April 2023 through June 2023

1. The Solicitation of Major gift prospects

Business/Corporate Division: May 2023 through August 2023

1. The solicitation of local and regional businesses capable of \$X

Parent Division: May 2023 through September 2023

1. The solicitation of current, past, and prospective parents of CA students

Alumni Division: April 2023 through September 2023

1. The solicitation of CA Alumni

Friends, Community, and Churches Division: October 2023 through December 2023

1. The invitation of community organizations and other friends of CA



It is all about the mission – our children

- Colgedale Academy's rich history has maintained a constant focus of providing strong Seventh-day Adventist Christian Education since 1892.
- Our goal is for each student to grow and achieve spiritual, intellectual, emotional, and mental excellence! **These building blocks motivate CA students toward a satisfying career choice that leads to Christ-centered leadership and eternity beyond.**

This is why CA's youth ministry is so relevant and important.





Voice of Support from the Georgia-Cumberland Conference

“ When it comes to Evangelism, our number one responsibility is our kids and youth as we want each of them in Heaven! With that comes the responsibility to have the best facilities possible where they can grow closer to Jesus AND become better equipped to serve their community!

The *Inspire Now and for Eternity* capital campaign is all about doing just that! David says in Psalms 127:3 that "*Children are a gift from the Lord; they are a reward from him.*" ***We want to take care of these gifts God has given us!***

-Gary Rustad, Conference President



Voice of Support from the Georgia-Cumberland Conference

"It is an honor to watch Ellen White counsel from the book Education chapter 13 followed at Collegedale Academy when she says, "True education is the harmonious development of the physical, the mental, and the spiritual powers. It prepares the student for the joy of service in this world and for the higher joy of wider service in the world to come." CA's pre-k -12 program does this by offering an unrivaled, well-balanced offering of spiritual, academic, music athletic, art and STEAM programming which positions it to sustain uniquely Seventh-day Adventist beliefs for generations to come."

- Kevin Kossick, Vice-President of Education



Consolidated Middle and Elementary School (Artist's Rendering)





E-8 Media Center/Library Concept





Music Suite Concept with Four Classrooms





Five lane drop-off and pick-up pattern & Overhead Bridge to Upper Playground





New Collegedale Academy Elementary School

