

## AMSA Capital Campaign

### Training Meeting – June 23, 2022

#### Objective:

- Outline steps and key ingredients of a successful capital campaign
- Outline strategy for AMSA \$2M fundraising initiative
- How can volunteers help?

#### Outline steps and key ingredients of a successful capital campaign

To start, AMSA had a limited formal development program in place. There is a donor database, a corporate prospect list and solicitation/acknowledgement program, an annual golf tournament and some annual individual giving. The Board has a designated Development Committee and there is a Foundation to support the school.

Conversely, the school has assets for fundraising:

- AMSA has excellent reviews and standing among charter schools,
- AMSA is located in a community of corporations that have a STEM focus,
- Foundations are – to some extent – focused on STEM initiatives,
- AMSA serves a diverse audience of students which is an important consideration for foundation and corporate funding, and
- Capital projects are often of interest to donors and/or present strong recognition opportunities that can draw new donors

*Volunteers are critical to a campaign. They are required to steer the fund drive, be ambassadors for the School, reach out to prospective supporters, and deliver the message of the importance of the capital improvements. It is suggested that AMSA have a minimum of six highly engaged, committed volunteers.*

The role of a campaign committee member or development volunteer is to:

- Be a chief booster for the campaign
- Review prospect lists, identify people, corporations, foundations to which they might make an introduction
- Attend events and talk about the campaign

Staff are instrumental to a campaign and provide tremendous leadership and support, but it is essential that staff be accompanied by volunteers when building relationships and making solicitations for support. Additionally, staff will exhaust their networks and established relationships and volunteers extend the reach of the School in connecting to new prospects.

*Staffing:* A successful campaign is driven collaboratively by the Board, Campaign Committee, Chief Executive/Staff team. The Chief Executive is critical to outreach to prospective supporters of all types – individuals, corporations, foundations. She is the face of AMSA and donors will expect to

hear from her about the project. To be successful, she requires collaboration from Trustees and Committee members. It is recommended that a Chief Executive identify responsibilities that can be delegated so that they are able to have sufficient time to invest in the campaign.

The campaign requires a staff person dedicated to managing data and assisting in supporting events, donor/prospect visits and the Chief Executive. A campaign consultant will manage the prospect pipeline, prepare grants or proposals, conduct prospect research, prepare for, and follow up on Capital Campaign Committee meetings, and support solicitors and the Chief Executive. It is important to have someone on-site who has campaign materials at the ready, can run a gift report and/or greet a visiting donor.

AMSA is fortunate to have staff already engaged in development and communications, including a grant writer, a corporate relations manager, and a public relations manager. Therefore, there is a knowledge base in place, as well as existing grant materials, corporate solicitations, and communications channels. These resources are all campaign assets to be built upon.

### **Outline strategy for AMSA \$2M fundraising initiative**

*Individuals:* The School has a substantial parent population and a growing alumni group (though young and only recently graduated (<10 years out). It has not historically had a robust fundraising program among individuals. However, parent (and alumni) populations are traditionally highly invested groups in the life of a school. It is expected that AMSA would enjoy strong support from parents and find connections and support from alumni or alumni parents. Further, as AMSA has not done a major fund drive – or even annual or major gift efforts – people have not already given “stretch gifts” to other initiatives. Therefore, there is not donor fatigue.

*Foundations:* A preliminary screening has been done to identify potential foundations that will support charter schools. There is a good size group of funders interested in charters and in STEM particularly. Programming is the primary interest, though there are some funders that are interested in/willing to fund capital improvements. The list of prospective funders includes program funders too and can be added to the grant writer’s list if they are not already aware of them. This foundation research process is dynamic, and the list is continually being built out. Volunteers have been asked to review decisionmakers at foundations to see if there are any relationships they might leverage to make an introduction for AMSA.

*Corporations:* AMSA has a strong history of engaging area corporations – particularly those engaged in the STEM field and those that are neighbors to the School. Mark Vital provided an initial list of companies with which AMSA has relationships. There was not a history of major donations to date from corporate partners nor had they been requested at those levels. A review of the corporate neighbors has been conducted. These companies are highly dedicated to STEM and STEAM programs, largely do not list capital funding as an area of interest and, often do not have a direct process for application which will require further relationship building.

With those caveats, we are approaching corporate prospects to see if they may take an interest in the facility renovations as they offer ample opportunities for recognition of supporters or, if they’d like to support AMSA’s equipment needs.

Gift Table

Gift Size	Number of Gifts Needed	Total to be Raised	Raised to Date
\$250,000	4	\$1,000,000	
\$100,000	2	\$200,000	
\$50,000	5	\$250,000****	\$50,000 - Sunovion
\$25,000	7	\$300,000	\$40,000 – 2 years' golf proceeds pledged
\$10,000 – 24,999	Many	\$150,000	\$23,000 – Beckman Colter w/ in kind \$15,000 Mifflin Fund
< \$9,999	Many	\$100,000	\$2,818.25
Total			\$130,818.25

\*\*\*\*Grants pending: 4 proposals pending @ \$50,000 each

**How can volunteers help?**

- Providing strategic direction for resource development for capital improvements
- Providing guidance on approaching potential friends, supporters of AMSA and helping to facilitate introductions
- Participating, with staff or fellow Committee members or Board members, in visits to prospective donors or supporters of the drive for capital support
- Assisting with promotion of AMSA via events and facilitation of small gatherings or meetings on behalf of AMSA
- Providing feedback on events and programs to help AMSA gain additional visibility and prominence
- Serving as a sounding board for external relations matters in which AMSA engages related to generating funds for capital improvements

**Sample assistance provided by volunteers to date:**

- Outreach to a colleague at a financial services firm that manages the investments of a foundation to which AMSA had applied, to put in a good word
- Preparation, by two different parents of grant applications to their places of business that have community giving programs
- Outreach to existing corporate partners to discuss the project
- Outreach to a corporate contact to put in a good word at a corporate foundation for a pending AMSA proposal
- Outreach to a neighbor, AMSA parent, who has considerable fundraising experience and contacts to ask for help