

RECOMMENDATIONS

The following recommendations are based on the qualitative and quantitative responses from the interviews, an analysis of real-time conditions within the organization and Donor By Design's professional judgment.

CAMPAIGN GOAL

While the full scope and scale of the YMCA's capital plans do not appear feasible at this time, leadership is encouraged to develop a plan of **modified facility improvements and renovations** that can address the most pressing needs and result in the greatest ROI. Funding for future phases will be based on the Y's ability to demonstrate its ability to raise significant capital funds and responsibly utilize those funds that will make a significant impact in the community.

Once the modified capital plans have been finalized, the Y will need to be certain that construction pricing, project scope and permitting is solid as they begin fundraising for these projects. Providing attractive naming opportunities for areas of the facility which are slated for refreshment or renovation may help inspire donors to consider larger contributions.

LEADERSHIP

The study uncovered a number of key community leaders who expressed a willingness to serve in leadership roles for a potential campaign. These key leaders should be recruited to serve on a **"blue ribbon" advisory council** to support and advise the CEO as she continues to elevate the YMCA's image and future roll in the community.

Re-engage key study participants with the "report to the community" document to review assessment findings, explore next steps in their engagement and communicate the Y's plans to move forward.

Other key community leaders can be engaged by serving on a committee to explore options for the Y's long-term plan for operation of the **residence program** and identify potential future use for the space.

BOARD DEVELOPMENT AND INVOLVEMENT

While a number of current board members were recognized and appreciated for their commitment to the Y and to the community, **ongoing board development** will be important to expand the organization's sphere of influence in the greater community.

The success of any capital fund raising effort hinges greatly on the level of involvement of the volunteer Board of Directors. Board and community volunteers must understand and commit to the highest levels of engagement. In addition to **100% financial support from the Board (at personal stretch levels)**, these volunteers must be willing to identify, cultivate and engage potential donors at the highest levels. Volunteers will be expected to leverage personal and professional relationships and serve as tireless advocates for the Y and the project. To be clear, a capital campaign is not a spectator sport.

COMMUNICATIONS/POSITIONING

A **positioning campaign** must be developed and executed lifting up the life-changing mission of the Y. Highlight the Y's vital role in the long-term health of the community including its outreach efforts and community partnerships. Utilize a range of communication tools including social media, and print and electronic media to reach the widest possible span of people. This plan needs to be coordinated with UMMC so that the community is hearing the same thing from both sources.

In addition to the positioning campaign, develop a comprehensive year-long **education and stewardship** plan for top donors, prospects, businesses, foundations and leadership volunteers. Use stewardship to **reconnect and reengage** past annual and capital donors.

CASE STATEMENT

Regardless of the scope and scale of the project, a strong and urgent case must be developed for all proposed capital improvements. The case must focus on the WHY and the So What— why will this investment make a difference and what will change/improve for members and the community as a result.

The case for support must link to the broader context of community needs and positive impact on the lives of those who live and work in the area. The case must have a strong emotional appeal and still be rooted in solid research, outcomes, impacts and goals. It should link to the Middlesex YMCA's strategic plan.

The case must communicate how capital investment translates into social investment in the community. ***It's not about a building, it's about building people.*** The case should also

leverage the long history of the YMCA in Northern Middlesex County to share the organization's deeply rooted commitment to the community and its role in inclusion for all.

A case statement, according to the Association of Fundraising Professionals, is "The centralization or documentation of all information describing the organization, including: needs, goals, objectives, strategies, tasks, facilities, budget, institutional plans, financial history, personnel and staff competence to serve the mission or the cause the organization represents. It is the data base."

A comprehensive case statement/document, expanded beyond that used for the feasibility study, needs to be written and should include the following:

1. The master plan of what the project is going to accomplish, the reasons for embarking upon this project and how it will meet the needs of the Y and community. Included should be the facts and statistics of the growth and needs in the service area of the Y.
2. A presentation of the community's needs and how the proposal will meet those human social concerns. In other words, what are the problems and concerns of the community and how is the campaign going to address them?
3. A statement that the Y is for everyone. No one is ever turned away due to the inability to pay.
4. The fact that the Y is strong financially and managed efficiently.
5. The statistical impact of the Y in terms of individuals and families served, as well as the number of programs and why they are essential.
6. Current collaborative ventures; in what partnerships is the Y engaged?

CULTIVATION

To achieve short-term as well as long-term capital fundraising goals, the Y must develop a well-organized cultivation plan. Identifying and involving past donors as well as new major donors will be the key to success. It will require a disciplined and strategic approach to cultivation. It also requires a high level of patience. Major gift development for a capital campaign is a very different process than solicitation of community gifts for the annual campaign. While the fundamental values are the same, the time and strategies required for higher level gifts are much more involved.

Make use of the recent wealth screening data to identify potential major donor prospects. Specific **donor engagement plans** must be developed for your **Top 20/Next 30** prospects. Donor cultivation is needed—speed dating doesn't work in major gift fund development. This process should include frequent mailings, "distinguished visitor tours," invitations to special events and personal/group presentations.

In addition, develop a strategy to build relationships and **cultivate top foundation** prospects as identified in the foundation scan.

Continue to utilize the **feasibility study case materials** to engage and educate key leaders about the true mission of the YMCA and to test a revised plan for capital investment.

Maintain efforts to strengthen the **Y's Annual Campaign**, engaging more donors and encouraging current donors to increase their gifts. Support volunteers to increase their roles in soliciting gifts and donor stewardship. Commit to monitor key metrics to assure healthy growth and execution.

Considering the significant and growing senior population in the community and membership, put in place the tools, policies and communications to promote the **endowment fund** for the YMCA.

COLLABORATION

Based on our interviews, there was very positive response to the Y's current and proposed collaboration with area schools, medical entities and other organizations. To strengthen its charitable message, **the Y must continue to explore opportunities to partner with others** to serve the needs of the community. A special effort should be made to explore a potential **health care partnership** which could result in external investment in facility improvements and program delivery.

STAFF TRAINING AND INVOLVEMENT

It will be important for staff to have the opportunity to provide feedback, ask questions and to fully understand the modified facility plans and why they are being undertaken. The **front-line staff will play a critical role in the campaign**, interpreting the project to members and assisting with prospect development and donor cultivation. All staff should be trained in articulating the key points of the project, identifying prospects and engaging members in the project. We recommend dedicating a half-day combined retreat to focus on the staff's important role in the capital campaign process. The time spent training staff and honing their development / member involvement skills will bring returns not only with the capital campaign but also in the annual campaign and in member retention. The staff is also an important donor group to cultivate for the campaign.