

**ROOSEVELT  
FOR  
GENERATIONS**

**AUGUST 3**

**CAMPAIGN CABINET MEETING**

*TRHS LIBRARY*

# ROOSEVELT FOR GENERATIONS

## AGENDA

- Welcome and Sharing
- Foundation Update
- The Campaign To-Date
- Moving the Campaign Forward
- Call Reports
- Next Steps



# ROOSEVELT FOR GENERATIONS

## FOUNDATION UPDATE

*ROSE GREEN*



# ROOSEVELT FOR GENERATIONS

## CAMPAIGN TO-DATE

*JACKIE NORRIS*

- **Total raised: \$1,844,269**
  - Track & Field restricted: \$873,700
  - Innovation Center restricted: \$135,000
  - Unrestricted: \$835,569



# ROOSEVELT FOR GENERATIONS

## CAMPAIGN TO-DATE

*JACKIE NORRIS*

- **Total raised: \$1,844,269**
- New commitments since last meeting:
  - MidAmerican: \$250,000
  - Dahl Trust: \$150,000
  - John Bucksbaum: \$100,000
  - Duncan Family: \$100,000
  - Fred & Charlotte Hubbell: \$35,000
  - Kay Bucksbaum: \$25,000
  - Beverly Blank Perry: \$25,000
  - Bruce & Susy Kelley: \$20,000
  - *Several under \$20,000*



# ROOSEVELT FOR GENERATIONS

## CAMPAIGN TO-DATE

*JANIE WINE, KAYE LOZIER & DIANE CALDBECK*

- Major donor cultivation event 6/29
- Duncan Field initiative



# ROOSEVELT FOR GENERATIONS

MOVING THE CAMPAIGN FORWARD

*ISC*



*ROOSEVELT FOR GENERATIONS*  
CAMPAIGN EVALUATION &  
RECOMMENDATION



# ROOSEVELT FOR GENERATIONS

## DISCUSSION OUTLINE

- Review background of campaign
- Share ISC recommendations for three campaign components
  - Campaign goal & projections
  - Campaign timeline
  - Project scope & construction timeline
- Answer questions & discuss next steps

# ROOSEVELT FOR GENERATIONS

## BACKGROUND

- Feasibility Study conducted with Renaissance Group in 2019
  - Recommended \$2.5 million campaign
- Planning committee approved \$5 million campaign goal
- Isaacson-Syverson Consulting Engaged in November 2019
- Paused efforts April – November 2020
- ISC recommended reduced goal & scope in November 2020
- Campaign cabinet activated in January 2021

ISAACSON//SYVERSON  
CONSULTING

# PREDICTORS OF CAMPAIGN SUCCESS

- Volunteer Leadership
- Case for Support
  - Is there a compelling reason for this project?
  - Vision & Impact: essential to today's campaigns & new generation of donors
- Giving Potential
  - How large, wealthy and passionate is the donor base?
- Organizational Strength
  - Is the organization financially sound; staffed appropriately and a “good cause”

## GIFT RANGE CHART // \$5 MILLION

<b>GIFT AMOUNT</b>	<b># NEEDED</b>	<b>TOTAL</b>
\$1,000,000	1	\$1,000,000
\$500,000	2	\$1,000,000
\$250,000	2	\$500,000
\$150,000	3	\$450,000
\$100,000	7	\$700,000
\$75,000	1	\$75,000
\$50,000	7	\$350,000
\$25,000	10	\$250,000
\$10,000	20	\$200,000
\$5,000	30	\$150,000
under \$5,000	many	

## GIFT RANGE CHART // TOTAL TO-DATE

GIFT LEVEL	GIFT AMOUNT	# NEEDED	# RECEIVED	TOTAL TO-DATE
<b>LEADERSHIP GIFTS</b>	\$1,000,000	1	0	\$0
	\$500,000	2	1	\$500,000
	\$250,000	2	1	\$250,000
	\$150,000	3	1	\$150,000
	\$100,000	7	4	\$400,000
<b>MAJOR GIFTS</b>	\$75,000	1	1	\$75,000
	\$50,000	7	2	\$100,000
	\$25,000	10	6	\$150,000
<b>SPECIAL GIFTS</b>	\$10,000	20	13	\$130,000
	\$5,000	30	12	\$60,000
	under \$5,000	many		\$30,000

**Amount raised to-date: \$1,844,269**

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## GIFT RANGE CHART // PROJECTED

GIFT AMOUNT	# NEEDED	# RECEIVED	TOTAL # PROJECTED	TOTAL AMOUNT
\$1,000,000	1	0	0	\$0
\$500,000	2	1	1	\$500,000
\$250,000	2	1	1	\$250,000
\$150,000	3	1	1	\$150,000
\$100,000	7	4	10	\$1,000,000
\$75,000	1	1	1	\$75,000
\$50,000	7	2	7	\$350,000
\$25,000	10	6	15	\$375,000
\$10,000	20	13	20	\$200,000
\$5,000	30	12	30	\$150,000
under \$5,000	many			\$150,000

**Total amount projected: \$3.2 million**

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## ISC CAMPAIGN RECOMMENDATION #1

- Reduce the campaign goal to \$3 million
  - Donor prospects at the remaining \$1 million, \$500,000, \$250,000 and \$150,000 levels have not been identified as viable
  - \$3 million goal better aligns with feasibility study
  - Probability of securing donations at top levels is not likely
  - 70% of campaign goal needs to come from top 15 gifts

## CAMPAIGN TIMELINE // PHASES

- Leadership and Major Gifts Phase – Quiet Phase, Personal Calls
  - Leadership Gifts - \$100,000 and above
  - Major Gifts - \$50,000 - \$99,999
- Special Gifts Phase – Personal Calls, Small Mailing with follow-up
  - \$10,000 - \$49,999
- Public Phase – Large Mailing and Community Activities Donations
  - Donations \$5,000 and less
  - Marketing and public relations component
  - Community and school activities to spur enthusiasm



## TIMELINE // ORIGINAL

- Campaign Reactivation // November - December 2020
- Leadership and Major Gifts // January 2021 – July 2021
- Special Gifts & Public Phase // August 2021 – December 2021
- Post-Campaign // December 2021 – January 2022

## ISC CAMPAIGN RECOMMENDATION #2

- Extend campaign timeline to June 2022
  - More time is needed to secure major and leadership gifts
  - Separating special gifts and public phases will lead to more success, and also be more manageable for campaign volunteers
  - ISC projects the campaign exceed \$2 million by end of 2021, but securing \$3 million by December will be difficult

## TIMELINE // PROPOSED UPDATES

- Campaign Reactivation // November – December 2020
- Leadership and Major Gifts // January – September 2021
- Special Gifts // October 2021 – January 2022
- Public Phase // February – May 2022
- Post-Campaign // June 2022

## PROJECT SCOPE & PRIORITIZATION

- Campaign projects currently total \$5 million
  - Track & Field: \$3.6 million
    - \$3 million from campaign; \$600,000 from DMPS
  - Library: \$1.5 million
  - Endowment: \$500,000
- Timeline for project completion not yet firm
  - Track & Field slated for Summer 2022
  - Library timeline has not yet been confirmed

## ISC CAMPAIGN RECOMMENDATION #3

- Revise project scope to reflect \$3 million campaign goal
- Prioritize for Track & Field projection completion in Summer 2022; with library to follow
  - Sense of urgency to get a new, *safe* track and field completed ASAP
  - Allows track & field project to move forward without the total campaign goal being met
  - Capitalize on DMPS financial commitment and early support of project (\$600,000 DMPS and \$873,000 individual donations)

## RECOMMENDATION PROS & CONS

### PROS

- Reducing goal allows campaign to succeed & sets realistic expectations
- Extended timeline is more manageable for volunteer-led campaign
- Track & field completion timeline of Summer 2022 allows for important project to move forward
- Staggered project construction supports school and volunteer management

## RECOMMENDATION PROS & CONS

### CONS

- Reducing campaign goal will require scope to be adjusted, requiring tough decisions to be made
- Campaign extension may require new volunteers or consultant re-evaluation
- Delaying library construction may dampen public/donor perception

## WHERE WE ARE TODAY

- \$1,840,000 raised to date
  - \$873,000 restricted to Duncan Field
  - \$135,000 restricted to Innovation and Learning Center
  - \$832,000 unrestricted



## NEXT STEPS

- Campaign Cabinet: Approve recommendations or develop new path forward
- Planning team: Prioritizes projects and updates plans consistent with \$ available
- Update materials, team, and donors accordingly

# ROOSEVELT FOR GENERATIONS

## PLANNING COMMITTEE COST ASSESSMENTS

*JACKIE NORRIS*



# ROOSEVELT FOR GENERATIONS

CALL REPORTS: *MAJOR-LEADERSHIP CALLS IN PROGRESS*

LAST NAME	FIRST NAME	CONTACT
Ghrist	Jo & family	Wine/Lozier/Betts
Cownie	Jim	Lozier
Krause	Kyle or Nan	Bone-Wheeler?
Langeness	Jim	Wheeler
Pappajohn	John	Caldbeck
Reichardt	Doug	Lozier/Caldbeck
Angrick	Bill	Leonard
Polk County		ISC
Betts	Chuck & Janet	Mead
Culver	Mari	Norris
Hansell	Jordan & Sylvia	Arnold
Lozier	Kristi, Charlotte & Laura	Caldbeck
Nish	Barb & Andy	Mead
Stuart	Kathy & Ted	Hemminger/Lozier/Caldbeck
Vernon	Chris & Rick	Wheeler



# ROOSEVELT FOR GENERATIONS

CALL REPORTS: *MAJOR-LEADERSHIP NEED ACTIVATION*

LAST NAME	FIRST NAME	CONTACT
Horner	Shari	Arnold/Caldbeck
Bucksbaum Scanlon	Mary	Caldbeck
Matthes	LaDonna & Rich	Lozier
Blank	Judy	Caldbeck
Gartner	Michael	Lozier/Caldbeck
Gordon	Andi & Jim	Caldbeck/Lozier
Hubbell	Rusty	Caldbeck
Lohmeier	Eric	Arnold/Gentry
Milligan	George & Deb	tbd
Rasmussen	Cindy & Steve	Lozier
Schoen	Don	Claypool
Sargent Family Foundation		Lozier



# ROOSEVELT FOR GENERATIONS

## NEXT STEPS & ADJOURN

*JACKIE NORRIS*

- Confirm direction
- Target \$2.4 million for track & field by January
- Leadership & Major Gift Solicitation: Now – Sept
- Special Gift Solicitation: Oct – Jan
- Public Phase: Feb – May

