

YMCA of Metropolitan Milwaukee

Summer/Fall 2018

Fundraising Feasibility Assessments



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YMCA Camp Minikani


Feasibility Study • Summer 2018

Feasibility Study Goals

- Image of the YMCA Metro Milwaukee & Camp Minikani
- Opinion of the proposed plans and projected goal
- Availability and potential of large gifts
- Availability of potential leadership for the campaign
- Timing, priority and strategy for the campaign



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Methodology & Scope of Work

Study Interviews

- 29 community leaders were interviewed in 26 face-to-face sessions. This list was vetted by staff and volunteers. Interviews tested the feasibility of raising \$8,000,000 to support facility replacements and expansions.
- In addition to Thom Peters or Robin Jordan from Donor By Design, Camp Minikani was represented by Jon McLaren, Executive Director of the camp in all interviews.

Key Questions

- How do you feel about Camp Minikani and the YMCA?
- How do you feel about the leadership of the Camp Minikani and the YMCA?
- How do you feel about the proposed capital campaign?
- How would you prioritize the projects?
- How do you feel about the goal?
- Where do think the top gifts will come from?
- Who do you think must be involved in the leadership for the campaign to be successful?
- Might you (personally) or your organization/company contribute to this effort?
- How do you feel about launching a major initiative at this time?



Study Materials



LAST YEAR AT CAMP MINIKANI:

More than 11,600 people participated at camp and experienced the Spirit of Minikani

- 1,563 children attended summer overnight camp
- 1,017 children attended summer day camp
- 156 teens participated in Leadership Training programs, building character and instilling a sense of community service
- 53 families bonded at Family Camp
- 8,840 individuals enjoyed the natural setting at camp for a conference or retreat

For All. Adoption Family Camp
Camp Soul: bereavement camp for children

CAMP FOR ALL

For the 2018 camp season, more than \$132,000 was awarded in camperships to ensure all children can experience the Spirit of Minikani, regardless of financial difficulties their families may be facing.



FOR THE NEXT 100 YEARS

Proposed improvements:

BREAK BREAD. MAKE MEMORIES. NEW DINING HALL.
Build a new Dining Hall to accommodate more campers. Create a new heartbeat of camp that carries on traditions and history.

POOL PARTY
Create social spaces and make pool an inviting place to gather and connect.

ENTRANCE AND PARKING
Create sense of arrival and improves drop-off and pick-up. Increases parking capacity.

NEW BATH-HOUSES
Offer comfort to campers and peace of mind to parents.

REPLACE EXPLORER YURTS
Build 6 cabins for our Explorer campers, providing year-round program and leadership opportunities.

UPGRADE SPORTS COURTS
Provide additional outdoor program space, while creating safer circulation for campers.

EQUESTRIAN CENTER
New Equestrian dormitory with kitchen will create and increase sense of community among equestrian campers



Study Materials



the **Y**

LEADING THE WAY

YMCA CAMP MINIKANI BOARD OF DIRECTORS

<p>Chris McArdle, Chair* Vice President MKE Benefits</p> <p>Anna Ballentine, Vice Chair VP of Communications Rogers Behavioral Health</p> <p>Scott Roecker, Immediate Past Chair* Straight Up Inc.</p> <p>John Bolger* Attorney Bolger Legal Group</p> <p>August Herschede* Realtor</p> <p>Jerry King President Pre-cast Engineering</p>	<p>Jill Kohli* Owner [m]pirik Health Solutions</p> <p>Pamela Kruse* Community Volunteer</p> <p>Drew Maxwell* MBA Professor & Owner Lightning Rod Studios</p> <p>Karl Schoendorf* Director LaCausa Crisis Nursery</p> <p>Greg Valde, PhD* Retired Professor UW-Whitewater</p> <p>David Weirdsma Owner Everything2go.com</p> <p><small>*Camp Minikani Alumni</small></p>
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YMCA CAMP MINIKANI
Celebrating 100 years

the **Y**

GETTING TO GOAL

▶ GIFTS NEEDED FOR AN \$8 MILLION CAMPAIGN

In order to achieve our campaign goal, we will need the support of donors from all walks of life. Lead gifts set the pace for the campaign and inspire the generosity of others. The following gift chart illustrates how we might attain our goal.

# of gifts	Amount	3 Annual Payments	Cumulative Total
1	\$1,500,000	\$500,000	\$1,500,000
1	\$1,000,000	\$333,333	\$2,500,000
3	\$500,000	\$166,667	\$4,000,000
5	\$250,000	\$83,333	\$5,250,000
7	\$100,000	\$33,333	\$5,950,000
10	\$75,000	\$25,000	\$6,700,000
13	\$50,000	\$16,667	\$7,350,000
15	\$25,000	\$8,333	\$7,725,000
15	\$10,000	\$3,333	\$7,875,000
20	\$5,000	\$1,667	\$7,975,000
25	\$1,000	\$333	\$8,000,000

YMCA CAMP MINIKANI
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the **Y**

ADDING IT UP

CAMPAIGN NEEDS SUMMARY

- ▶ NEW DINING HALL & SWIMMING POOL..... \$4,800,000
 - Dining Hall (\$3,100,000)
 - Pool (\$1,700,000)
- ▶ CAMP LIFE: \$1,828,000
 - Downtown Camp (\$348,000)
 - New Ropes Course (\$250,000)
 - New Bath Houses: (\$730,000)
 - Replace Explorer Yurts with 6 cabins (\$300,000)
 - Sports & Field Updates (\$200,000)
- ▶ PARKING/GATEWAY IMPROVEMENTS: \$500,000
 - Entrance procession and parking (\$200,000)
 - Relocate maintenance shop (\$300,000)
- ▶ EQUESTRIAN CENTER \$800,000
 - Equestrian Dormitory w/kitchen (\$750,000)
 - Storage for hay / jumps (\$50,000)

TOTAL TIER 1 NEEDS: \$7,928,000

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NEW POOL

- Pool locker rooms separate from dining hall
- Outdoor gathering/recreation space

NEW POOL \$1,700,000

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the Y

PARKING/GATEWAY IMPROVEMENTS

- Entrance procession and parking
 - Easier, safer, more intuitive camp drop-off/pick-up
 - Increased parking capacity
 - More inviting, tree-filled arrival
- Relocate maintenance shop

Celebrating 100 years

the Y

CAMP LIFE

- Downtown Camp
 - Gathering area, amphitheater
 - Replace Explorer Yurts with 6 cabins
 - Winterized cabins will provide for year-round programming
- Sports & Fields Updates
 - Updated activity center
 - Safer circulation for campers
- New Bathhouses
- High Ropes Course
- Ensure ADA Compliance throughout camp

Celebrating 100 years

the Y

EQUESTRIAN CENTER

- Equestrian Dormitory w/kitchen
 - Campers stay near center
 - Efficient meal service
- Storage for hay and jumps

Celebrating 100 years

the Y

NEW DINING HALL

- Accommodates all campers safely and comfortably
- Enhanced lake view
- Expanded, more functional kitchen
- Improved restrooms (handwashing stations)
- Serve as heartbeat of camp

the Y

ANNUAL SUPPORT

Provide financial assistance and scholarships to ensure all children have the opportunity to experience camp, regardless of their family's financial situation.

the Y

ENDOWMENT GROWTH

The costs of running quality programs and facilities as well as training great staff continue to rise. A strong Endowment will help ensure we don't pass these costs on to our camper parents. With a healthy endowment, we can:

- Ensure camp remains affordable for all families
- Help provide programs and scholarships
- Offset facility upkeep costs






Interview Findings & Observations



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Comparison Indicators

(based on similar projects)

-  **Top-tier** as compared to thousands of interviews;
no concerns
-  **Mid-tier** as compared to thousands of interviews;
need to be addressed to achieve desired
campaign goals
-  **Lowest-tier** as compared to thousands of interviews;
must be addressed prior to launching the
capital campaign

General Awareness and Community Support

Are you familiar with YMCA Camp Minikani, its programs and activities?

Very Much So	Yes	Somewhat	No
77%	23%	0%	0%

What is the most important benefit a community derives from the presence of YMCA Camp Minikani?

- Staff are positive role models
- Relationships
- Safe environment
- Life changing
- Character Values
- Great traditions
- Meeting kids who are different than you
- "Helped me be the person I am today"
- Light-hearted, fun, happy, silly place"

Image

What is the image of YMCA Camp Minikani in the community?


Very Good	Good	Fair	Poor	Don't Know
88%	12%	0%	0%	0%

Comments on image:

- Very good reputation
- Highly regarded
- Leadership
- "Alumni want their kids to go there"


Organizational Leadership

Do you know the members of the Camp & Executive Boards of directors?




Yes	No	Most	Some	One or Two
16%	0%	16%	29%	39%

Would you say these individuals have the ability to raise major gifts?



Yes	No	Most	Some	Not Sure
0%	0%	0%	50%	50%

 Is YMCA Camp Minikani & the YMCA of Metro Milwaukee viewed as well run and financially sound?

Most all felt strong with leadership but commented that they were concerned about the health of the Metro Y and that it could effect fund raising.

Proposed Projects

Do you think that YMCA Camp Minikani is on the right track with the projects outlined within this comprehensive campaign?

Yes	No	Not Sure
96%	0%	4%

Comments on Capital:

- Didn't realize there was so much year-round activity
- Dining hall is important
- Waterfront important – more than pool
- Be cautious not to change the character of camp
- "Seems extremely necessary"
- "Parking isn't sexy but can see security/safety issues"

Project Prioritization

➤ New Dining Hall

➤ Camp Life

➤ Pool

➤ Annual Campaign

➤ Endowment

➤ Parking/Gateway Improvements

➤ Equestrian Center


Project Prioritization

Comments on project ranking:


- Price tag: \$3M – on Dining Hall much more reasonable than previously
- Replacing yurts with your-round housing makes sense
- New bath houses that meet standards are important
- From day camper drop off perspective, can understand safety and security with new parking
- While equestrian not seen as priority, increasing capacity of housing can be – “what is the ROI?”

Feasibility

Do you believe that a comprehensive campaign of \$8,000,000 million is realistic and attainable over a 3-5 year period?



Yes	No	Not Sure
62%	0%	38%



Yes	No	Not Sure
85%	0%	15%

Are there individuals, businesses or foundations who have the ability to give these kinds of gifts over a 3-5 year period?

Comments on Goal and Area Capacity:

- Phase projects – dining hall first
- Case message will be important
- Will take a significant lead gift
- There is a strong alumni with resources

Feasibility and Campaign Leadership

Would you personally consider making a gift to the proposed campaign?

Yes	No	NA
88%	0%	12%

Yes	No	Maybe	DK/NA
21%	4%	4%	71%

Do you feel that your company/business would consider a gift to this project?

Would you be willing to take a leadership role, sit on a Campaign Leadership Cabinet or make a few key visits for the campaign?

Yes	Maybe	Don't Know	No	Not Asked
85%	0%	4%	0%	12%

Community Receptivity and Environment

How would you assess the economic condition of the surrounding area at this time?



Very Good	Good	Fair	Poor
4%	96%	0%	0%

Do you know organizations that are planning to conduct a campaign in the same time period?



Yes	No
33%	67%

Community Receptivity and Environment

Does now appear to be an appropriate time to begin this campaign?



Yes	No	Maybe
100%	0%	0%

Comments on Timing:

- Good timing with 100th anniversary
- Will need for donors to be comfortable with Milwaukee
- “Now is the time with camp full”
- “We have to; can’t keep it the way it is”

Recommendations

Based on our interviews and the findings of the study we believe that YMCA Camp Minikani has the capacity and community support to launch a major comprehensive campaign in the range of **\$5,000,000 – \$6,000,000.**

Donor engagement at this level is strategic. It takes time to secure six and seven-figure commitments. The majority of the top prospects identified in this study will need additional cultivation.

# of Gifts	Amount	3 Annual Payments	5 Annual Payments	Total
1	\$1,500,000	\$500,000	\$300,000	\$1,500,000
2	\$1,000,000	\$333,333	\$200,000	\$3,500,000
2	\$500,000	\$166,667	\$100,000	\$4,500,000
2	\$250,000	\$83,333	\$50,000	\$5,000,000
3	\$100,000	\$33,333	\$20,000	\$5,300,000
3	\$75,000	\$25,000	\$15,000	\$5,525,000
4	\$50,000	\$16,667	\$10,000	\$5,725,000
6	\$25,000	\$8,333	\$5,000	\$5,875,000
6	\$10,000	\$3,333	\$2,000	\$5,935,000
10	\$5,000	\$1,667	\$1,000	\$5,985,000
15	\$1,000	\$333	\$200	\$6,000,000

Recommendations

- **Case Development** – A strong and urgent case must be developed for each capital project. The case must focus on the **WHY** and the **So What**— why will this investment make a difference and what will change at camp as a result?
- **Leadership is Everything.** Consider Co-Chairs/Tri-Chairs for the campaign. Take time to engage well respected alumni & camp family leaders and secure their personal commitment to the project.
- The Y needs to recruit a strong and connected **Leadership Cabinet** which includes both alumni leaders and current board leaders. Consider pairing existing key leaders with emerging leaders as you develop the leadership team. Also consider geography and camp eras.

Recommendations

- Secure a **partnership** or **lead/challenge gift** for each project.
- **Project scope.** Make sure construction pricing and project scope is solid as you begin fundraising for these projects. There was some earlier concern on project pricing, so reassure costs.
- **Project priorities** should be developed and aligned to donor interests. The dining hall is clearly the lead, but there is interest in some of the camp life projects that could be connected to key prospects.
- **Assure confidence** that all funds will go to camp projects with donor contracts & restricted gifts. Use confidence in current leadership.

Recommendations

- A **communication campaign** must be developed and executed lifting up the life-changing work of the camp. Camp is in a strong position with enrollment, but this has also created some concern for next summer. The year-round work and expanded leadership opportunities should be highlighted.
- 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.

Recommendations

- Evaluate and ensure necessary **development infrastructure** to support a successful campaign.
- Develop a diverse and attractive list of **naming opportunities** for all capital projects.
- **Camp Endowment Case** – In addition to unrestricted endowment, consider endowment requests as part of a comprehensive approach to donors as appropriate.
- **Re-engage** key study participants with a “report to the community” document to review assessment findings, explore next steps in their engagement and communicate the camp’s plans to move forward.

Next Steps

- **Project scope and priorities:** Develop not just a list of priorities based on giving interest, but make sure cost expectations are clear.
- **Campaign Case:** There is a strong expressed need, not put together the impact projects will have with these needs.
- **Leadership:** Recruit Chairs and begin to identify leadership.
- Identify **Top 20/Next 30 prospects** and develop donor engagement strategies. Start cultivation with top gift prospects.
- Develop a **campaign plan and timeline.**



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YMCA of Metropolitan Milwaukee

Endowment Branch Projects • Fall 2018

Study Interviews

- 12 community leaders were interviewed in 10 face-to-face sessions. This list was vetted by staff and volunteers. Interviews tested the feasibility of raising \$5,800,000 for:

Northside	\$318,000
Rite-Hite	\$2,242,000
Endowment	\$3,000,000
Neighborhood Expansion	\$TBD

- In addition to Bruce Berglund from Donor By Design, the Y was represented by Carrie Wall, President / CEO.

Image

What is the image of YMCA Camp Minikani in the community?


Very Good	Good	Fair	Poor	Don't Know
0%	40%	60%	0%	0%

Comments on image:

- The Y has been invisible since bankruptcy
- The Y is no longer a philanthropic player in the city
- The Y is still well regarded from those it serves
- The Y's image is muddled and in transition
- The Y isn't telling its story
- The Y staff are well regarded
- The bankruptcy is more fresh for board members – old news for the community

Proposed Projects

Do you think that YMCA is on the right track with the projects outlined within this campaign?



Yes	No	Not Sure
80%	10%	10%

Comments on Capital:

- Don't shy away from capital needs
- Program for kids and families is stronger than the capital projects served up
- A realistic and small capital goal would be a good way to "walk" before you run back into major gift fundraising
- It's not the right time to talk about endowment development

Project Prioritization

➤ Rite Hite

➤ Northside

➤ Annual Campaign

➤ Neighborhood Expansion

➤ Endowment

Feasibility

Do you believe that a comprehensive campaign of \$5,800,000 million is realistic and attainable over a 3-5 year period?



Yes	No	Not Sure
40%	0%	60%



Yes	No	Not Sure
30%	0%	70%

Are there individuals, businesses or foundations who have the ability to give these kinds of gifts over a 3-5 year period?

Comments on Goal and Area Capacity:

- Consider \$3MM - \$3.5MM goal + camp campaign
- Endowment was ranked last by most of the interviews
- Annual campaign not connected to program needs

Feasibility and Campaign Leadership

Would you personally consider making a gift to the proposed campaign?

Yes	No	NA
60%	0%	40%

Yes	No	Maybe	DK/NA
33%	11%	34%	22%

Do you feel that your company/business would consider a gift to this project?

Would you be willing to take a leadership role, sit on a Campaign Leadership Cabinet or make a few key visits for the campaign?

Yes	Maybe	Don't Know	No
10%	60%	10%	20%

Recommendations

Based on our interviews and the findings of the study we believe that the YMCA of Metropolitan Milwaukee has the capacity to raise **\$3,000,000 – \$3,500,000** for the projects tested.

Based on our interviews, we would recommend not launching an endowment initiative at this time.



**Comprehensive
Campaign**

Recommendations

- **Comprehensive Campaign** – considering the results of both studies: launch a \$10,000,000 comprehensive campaign to support:
 - YMCA Camp Minikani
 - Rite Hite YMCA
 - Northside YMCA/Early Childhood Education Expansion
 - Neighborhood Expansion
- **Leadership** – It's recommended that Camp have a traditional Leadership Cabinet. Conversely, the Association Campaign have 6-8 key volunteers who will make 20 key asks.

Recommendations

- **Positioning.** The YMCA of Metropolitan Milwaukee needs to start telling its story again. Camp should be part of this wonderful story. Celebrate the 160th Anniversary over the next 12 months.
- Specific **donor engagement plans** must be developed for those who may be combined asks for both camp and association projects. Engagement and solicitation must be coordinated.



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Questions?

