

PROPOSAL:

FEASIBILITY STUDY & FUNDRAISING CONSULTANT SERVICES FOR THE ASHE COUNTY RECREATION CENTER PROJECT



Submitted by:

Johnny Burleson

Principal, Mid-Atlantic

johnny@creativefundraisingadvisors.com

Date:

January 31, 2025

creativefundraisingadvisors.com



CREATIVE
FUNDRAISING ADVISORS



ABOUT CFA: COMPANY BACKGROUND

Creative Fundraising Advisors (CFA) provides strategic fundraising counsel and comprehensive philanthropic services to a wide range of nonprofit organizations throughout the United States. CFA prides itself on being a boutique, nimble, full-service consulting firm. We believe every Ashe County has its own set of strengths and challenges and deserves its own set of unique solutions. We see little value in offering generic, temporary, cookie-cutter solutions. Our goal is to be your partner throughout the process long-term and to serve as an invaluable member of your team.

We also believe that campaigns are about a big vision and a big idea. And we believe that donors don't give to what you do, they give to why you are doing it. Throughout our process, we will work with you to articulate that vision for your campaign – your “why” – so that you can achieve maximum fundraising success.

CFA's consulting practice focuses on four principal areas within the nonprofit sector: arts & culture, human services, education, and the environment. The core of our work is supporting mission-driven organizations to design, test, plan for, and ultimately execute major fundraising campaigns (including annual giving, capital, endowment, program expansion, and comprehensive campaigns) that fuel transformative change and allow those organizations we work with to have an even greater impact on the communities they serve. As a company, we value collaboration, transparency, integrity, creativity, and change.

CFA has engaged in several exciting and transformative projects at dynamic institutions throughout the country. These include:

Campaign planning and implementation counsel for the **North Carolina Museum of Art Foundation's** (Raleigh, NC) \$75 million *Reimagining the Possible* comprehensive campaign; a feasibility study and campaign counsel for **The Music Center of Los Angeles County** (Los Angeles) programmatic expansion and capital campaign; campaign counsel for the \$388 million campaign to build the new **Academy Museum of Motion Pictures** (Los Angeles); a feasibility study and campaign counsel for **St. John's College's** (Annapolis, MD and Santa Fe, NM) \$300 million *Freeing Minds* campaign; a campaign readiness and feasibility study for **Triangle Land Conservancy** (Durham, NC); a feasibility study for **The Nature Conservancy of Minnesota, North Dakota, and South Dakota's** \$100 million campaign; a campaign readiness and feasibility study for **The Science Museum of Minnesota's** (St. Paul) \$125 million *A Campaign for the Future of Minnesota* campaign; a development assessment and campaign counsel for **Lincoln Center Theater** (NYC); a development assessment and campaign counsel for **92NY's** (NYC) \$150 million *The Next 150* campaign; fundraising counsel for **The Nature Conservancy's** global campaign (District of Columbia); strategic planning, a feasibility study, and campaign counsel for **The Entertainment Community Fund's** (NYC and Los Angeles) \$160 million *Essential* campaign; a feasibility study and campaign counsel for **The Guthrie Theater's** (Minneapolis) \$80 million program and endowment campaign; campaign counsel for a \$350 million campaign for **Trinity Park Conservancy** (Dallas, TX) to build *Harold Simmons Park*; and many others.

A full list of Ashe County s may be viewed at: creativefundraisingadvisors.com.



PROJECT UNDERSTANDING

Ashe County, North Carolina, is embarking on an ambitious project to expand and enhance its Family Central recreation facility. This initiative, rooted in the county's commitment to improving community wellness and recreational opportunities, responds directly to citizen requests identified in multiple planning efforts, including the 2021 Ashe County Comprehensive Parks and Recreation Master Plan. **Led by Ashe County Parks and Recreation, this project aims to expand and build upon the wide range of quality wellness and recreational programs and facilities that enrich the quality of life for all citizens and visitors.**

The proposed expansion is substantial, involving the demolition of an existing structure and the construction of approximately 36,000 square feet of new space. The estimated cost for this building expansion is \$20 million. **The new facility will feature a variety of amenities designed to serve the diverse needs of the community, including workout facilities, a walking track, an aquatics center, and expanded childcare facilities.**

In addition to the indoor improvements, the project also encompasses significant outdoor recreational enhancements. These include the demolition of an old brick concession stand and the addition of a fitness course, court games, a picnic pavilion, a splash pad, and expanded playground space.

The need for this facility is well-supported by demographic data. As of 2019, 24.7% of Ashe County's population was over 65 years old, highlighting the importance of multi-generational facilities. The expansion plan is designed to be functional year-round, ensuring maximum utility and community benefit.

One notable aspect of the project is the inclusion of an aquatics center. Currently, the Ashe County High School Swim Team has to travel to neighboring Watauga and Alleghany counties for practice, underscoring the need for local swimming facilities. Overall, this project represents a significant investment in Ashe County's future, aiming to provide a comprehensive, multi-generational recreation facility that will serve the community for generations to come.

Ashe County is seeking proposals from qualified consultants to assess the feasibility of raising funds for the development of this new recreation center. **CFA's following proposal to support this exciting and important project includes the following key components:**

A comprehensive feasibility study will be conducted to evaluate the potential for fundraising. This study will analyze the county's current resources, identify gaps, and determine realistic financial goals. Additionally, the proposal includes identifying and planning to secure potential funding sources, along with developing a detailed fundraising strategy focused on private donors, grants, and public funding opportunities. Both short-term and long-term fundraising goals will be outlined to ensure a sustainable approach to financing the project.

A robust community engagement plan that includes proposed community listening sessions and focus groups will be developed. This strategy will involve local residents, potential donors, and stakeholders in supporting the recreation center initiative. Furthermore, this plan will address public outreach, communication strategies, and innovative ways to generate and maintain public interest in the project.

Finally, an implementation plan will be provided, featuring a clear timeline and action plan for executing a fundraising campaign. This will include specific recommendations on resource



allocation and detailed steps necessary to secure funds, ensuring a structured and efficient approach to achieving the project's financial objectives. The following outlines our methodology for this scope of work:

SCOPE OF WORK & METHODOLOGY

CFA firmly believes that each client deserves its own approach to determine the feasibility of a campaign. To support this, CFA has developed a breadth of strategies tailored to each client's unique situation and needs.

Internal Assessment & Yield Analysis

As a first step of the feasibility study, CFA will conduct a thorough assessment of the development potential with an eye to determining readiness for launching a campaign. This would include an audit of the project's supporting staff and their capability (including determining if staff is in place for a campaign in terms of both size and individual skill sets), and an assessment of volunteer fundraising committees and their ability to meaningfully assist with fundraising efforts.

As a part of our assessment, CFA may partner with DonorSearch to complete a customized wealth and philanthropic screening of any existing or identifiable database of potential donors. We will combine additional donor data with the screening to create a potential campaign yield analysis, a recommendation for a plan to support achieving that yield, and a theoretical range-of-gifts table for a proposed campaign. This will help Ashe County better understand both how to scale a potential campaign as well as where to place additional resources, as it will reveal current and potential major and annual support across the giving spectrum. Additionally, this information can be used to help develop and prioritize the list of potential interviewees for the study.

At the end of the internal assessment a written report will be delivered to staff leadership and others as deemed appropriate by the client.

Developing The Case Summary

In concert with an internal assessment, CFA will develop a Case Summary for the campaign. The importance of a strong vision presented in a compelling case summary cannot be overemphasized as a key tool to engage and lead prospective donors toward a successful campaign result.

The Case Summary is a draft document that articulates the vision driving the campaign, the priorities of the campaign and suggests a campaign goal. It is intentionally designed to stimulate discussion about the organization's plans for the proposed campaign. The document is meant to be a "draft for discussion." The interviewees should know from the start that Ashe County wants their feedback, that their input will ultimately determine the campaign priorities, and that their participation will shape a final Case for Support.

In advance of preparing the summary of the case for support, we propose that we conduct a series of "community listening sessions" to gather information from key Ashe County constituencies and community partners to better understand the perception of this Ashe County Parks and Recreation project and what various constituencies expect. Additionally, feedback will be gathered about how a transformational campaign might impact those whose lives and



organizations are most closely touched by the mission and activities of Ashe County Parks and Recreation. The ultimate purpose of these community listening sessions is to co-create the Recreation Center's case for support with its community.

From there, CFA will develop a case summary that incorporates this feedback and articulates a bold statement of the vision as well as the comprehensive transformational impact this campaign will have on Ashe County and its community members.

Conversations With Prospects

The Feasibility Study guides interviewees through a set of carefully crafted questions and will assess donor affinity for the project's proposed vision, priorities, and goals. The study will engage potential prospects in meaningful conversations about topics that are likely to have the most bearing on the success of the campaign:

- Prospects' level of enthusiasm for the proposed case;
- A general conversation about the interviewees' potential level of campaign participation and the factors influencing that decision;
- The prospects' interest in naming opportunities presented as part of the campaign;
- An assessment of the prospects' ability to give to the campaign;
- The prospects' level of enthusiasm for the current institutional leadership (both professional and volunteer);
- Name-gathering for who might be the most effective chairs for the campaign and members of a Campaign Committee;
- Other philanthropic priorities the donor prospects may have.

CFA expects to interview 30-40 campaign prospects who represent a diverse group of individuals with a philanthropic history connected to Ashe County or similar projects. These confidential interviews could include major donors, institutional partners (both foundations and government funding partners), newly identified major gift prospects, and others deemed necessary by Ashe County.

The interviews, which last between 30 and 60 minutes, are confidential and typically take place over Zoom or in person. CFA has conducted hundreds of feasibility study interviews via Zoom and has experienced a higher participation rate using this method compared to in-person interviews. However, given that the lead consultant for this project lives in Ashe County, most interviews will be conducted at a location of the prospect's choosing, including their homes or offices.

Focus Groups

Because CFA believes that campaigns should be looked at through both a lens of those who can provide transformational gifts, and also those for whom the campaign would have the greatest impact, in addition to and following the one-on-one interviews, CFA will also conduct a series of focus groups with various Ashe County community members and partners. The purpose of these focus groups is to both test the big ideas that are proposed in the case for the campaign in a more general way, and to get a better sense of how this Ashe County initiative is perceived by the philanthropic community. These focus groups are a good barometer of the enthusiasm for a new recreation facility, a gauge of civic pride for the effort, and to get a better



understanding of what motivates donors and future members to support this project.

Interim Report

Organizations are eager to learn how the proposed campaign is received in the community. Because the interview process can be somewhat protracted, mostly due to the availability of the interviewees, CFA will provide an interim report when approximately half of the interviews are completed.

Final Report: Creating A Path Forward

The final step of the Feasibility Study is to share the findings and recommendations with the organization's leadership. The report will be presented to the Feasibility Study Task Force, key community partners, and staff, and will include the following deliverables:

- A comprehensive potential campaign yield analysis based on donor data analytics;
- Topline impressions of Ashe County and the proposed campaign priorities held by Ashe County's best prospects;
- Identification of the top 10 (most likely and most significant) financial gifts among those interviewed;
- A recommendation for the most effective way to position the Case for Support;
- A recommendation for a working campaign goal and an associated range-of-gifts table;
- A recommendation for how the campaign should be organized in terms of key volunteer leadership and steps for recruitment;
- An assessment of other major campaigns either being planned or conducted in the community that would impact this effort and how those campaigns might impact a potential campaign;
- A timeline of key activities for a "quiet or leadership phase" and an overall timeline for the campaign (including potential campaign phasing, including lead gift solicitations);
- Recommendations for the internal capacity that will be needed (including staffing and systems) that will be needed to support the campaign;
- An assessment of internal campaign readiness and, if a campaign is being recommended, the necessary steps that need to be taken to ensure the organization is campaign ready;
- If a campaign is being recommended, recommendations for what actions need to be taken to plan for the launch of the leadership phase of the campaign.

Feasibility Study Task Force

We recommend that Ashe County form a small sub-committee (possibly including select campaign prospects) to oversee CFA's work throughout the process. This committee would approve the work plan, the draft Case Summary, the list of individuals invited to participate in the study, and the communications with those individuals. The committee will meet three to four times during the process: at the start of the study, approximately halfway through to hear the interim report, and to review the full report before its broader presentation.

Given the project's intensity and potential impact, we believe this level of engagement and accountability is crucial. Furthermore, the decision to proceed with a campaign ultimately rests



with the client. It will be important to have a sub-committee participate in the decision-making process who have been engaged throughout the study. Finally, the committee can serve as an important vehicle for cultivating key campaign prospects.

TEAM COMPOSITION

This project will be led by CFA's Principal Mid-Atlantic, Johnny Burleson and supported by Senior Manager of Data Solutions Dan Alberti and a member of CFA's Project Management team (TBD) (see Appendix A for staff bios).

PROPOSED TIMELINE

CFA anticipates the proposed scope of work will take approximately 6 months to complete. The anticipated timeline for the scope of work is as follows:

Months 1–2

- Orientation Meeting of a Feasibility Study Task Force
- Internal Assessment Begins

Months 2–3

- Development of the Summary of the Case for Support
- Second Meeting of Feasibility Study Task Force
- Approval of the Case for Support and Interview Materials
- Feasibility Study Interviews Begin

Month 4

- Interim Report and Delivery of Internal Campaign Readiness Assessment
- Third Meeting of Feasibility Study Task Force
- Interviews Continue

Month 5

- Interviews Completed
- Focus Groups

Month 6

- Fourth Meeting of Feasibility Study Task Force (Final Report Delivered)

The anticipated timeline is dependent on Ashe County 's timely response to and delivery of data and information as requested by CFA.



BUDGET, FEES & EXPENSES

The fee for executing the scope of work as proposed above is \$75,000.

In addition, CFA will bill Ashe County for all reasonable and necessary expenses related to CFA's delivery of the services, including airfare, hotel, transportation, parking, mileage, and related meals. Since the project lead lives in Ashe County, additional expenses will be minimal, if any.

It is CFA's experience that the flat fee model (as opposed to the billable hours model) is more suitable for our clients. Under the billable hours pay structure, it can be stressful for organizations to locate additional budgetary resources if unforeseen circumstances require more hours beyond the time originally anticipated to reach goals and objectives.

REFERENCES

Neighborhood House

Sarah Berger

Vice President of Advancement

sberger@neighborhoodhousemn.org

651-356-9129

Northside Achievement Zone

Karen Casanova

Chief Development Officer

kcasanova@the-naz.org

612-408-5072

Triangle Land Conservancy

Sandy Sweitzer

Executive Director

ssweitzer@triangleland.org

919-908-0051



APPENDIX A: PROJECT TEAM

Johnny Burleson

Principal, Mid-Atlantic

Johnny comes to CFA with over 20 years of nonprofit advancement experience in the arts and cultural, educational, and human services sectors. His proven track record of high-trust, high-performance leadership spans multiple areas of expertise, including campaign planning, major gifts, corporate and foundation relations, and government relations.

As Principal, Mid-Atlantic, Johnny oversees projects spanning CFA's suite of fundraising counsel services. Johnny believes in aligning donors' passions with innovative ideas, emphasizing the importance of promoting philanthropy through coalition-building and partnerships to achieve the greatest impact.

Prior to joining CFA, Johnny served as Chief Advancement Officer for North Carolina Museum of Art in Raleigh, where he successfully restructured development and membership operations and transitioned the organization from a transactional approach to an institution-wide culture of philanthropy. Johnny also oversaw the planning of the largest fundraising campaign in the museum's history.

Prior to his role at NCMA, Johnny held the position of Director of Strategic Partnerships with the Blue Cross and Blue Shield of North Carolina Foundation, playing a pivotal role in building and stewarding local, state, and national relationships to bring philanthropic and federal resources to North Carolina in support of stronger, healthier communities. Johnny's extensive career also includes 17 years in higher education philanthropy and advancement. He began at his alma mater, North Carolina State University, where he received a BS in Textiles with a focus on the Italian textile industry. Additionally, he held leadership positions at Appalachian State University and the University of North Carolina School of Government in Chapel Hill.

Johnny has volunteered as board member for several North Carolina nonprofits, including Preservation North Carolina, Triangle Land Conservancy, Lost Province Center for the Cultural Arts, Ashe County Chamber of Commerce, and Ashe County Arts Council. Outside of work, Johnny can be found on Old Orchard Creek, his blueberry farm located in Ashe County, NC. His farm is on the National Historic Register and is also protected by a conservation easement, reflecting his personal passion for the mountains, the arts, historic preservation, water, land, trails, local food, and sustainable agriculture.

Dan Alberti

Senior Manager, Data Solutions

Dan comes to CFA with over 15 years of experience in nonprofit management, community engagement, and corporate social responsibility.

As Senior Manager of Data Solutions, Dan leads all data analysis components of CFA projects and collaborates with Stephanie Brouwer, Senior Manager of Prospect Development, on assessing the specific data needs of each CFA client. Dan enjoys taking the complicated and making it simple, and showing how anyone can use data in their work.



Most recently, Dan served as Director of Impact Analytics at City Year Chicago, where he developed data strategies, analyzed student performance data, and trained young adults in how to read and utilize data.

Dan began his nonprofit career after serving in AmeriCorps*NCCC during Hurricane Katrina recovery efforts. After moving to Chicago, he started working for Chicago Cares as Director of the Corporate Volunteer Program, where he consulted with corporate partners on community engagement and employee engagement programs while overseeing Serve-a-thon, Chicago's largest day of service. Since then, Dan's career has given him the ability to work in a wide variety of areas such as education, environment, food security, veteran services, economic development, arts, and community services.

Dan earned his MPA from University of Illinois at Chicago with a focus in public policy and data analysis. His graduate research included statistical methodology to analyze property assessment data and measuring effective urban policies.

Dan pulls a diverse skill set and takes a multidisciplinary approach to any challenge. Dan has been an axe-throwing coach, private investigator, high school counselor, karaoke DJ, plumbing apprentice, community affairs in professional baseball, and amateur woodworker. He lives in Chicago with his wife, son and dog, Bones.