



Educational Area Grant Campaign Readiness Tips

Laying the Foundation for Success

Providing our collegiate members with a living environment which supports academic success, encourages leadership development and fosters our high ideals is the privilege of our house associations.

House associations may have a need to enhance, renovate or build a new living facility for the collegiate chapter. In many cases, reaching out to the alumnae of the chapter to assist with financing these important projects are necessary.

If your alumnae chapter and house association are considering a capital campaign to raise money for improvements to your chapter house, or for a new facility, you will benefit from reviewing the following items and identifying the areas you can enhance to increase the likelihood a capital campaign will be successful.

Evaluate House Association Efficiency

An efficient and effective house association is the essential building block of a successful capital campaign. As you begin to think about the chapter's housing needs and necessary improvements, take time to evaluate the house association's proficiency.

Here are some things you can do:

- Ensure the house association is in good standing with the state of incorporation and has filed all Forms 990 with the IRS.
- Review your governing documents. Make sure the following are up to date and in order:
 - IRS determination letter
 - Bylaws
- Compile at least five years of tax returns and financial statements for the financial packet you will submit to lenders.
- Develop an open line of communication with the Director of House Associations and your Regional Housing Coordinator. You can find their contact information on the Fraternity's website at alphagammadelta.org.

- Review your meeting dates. Are you holding meetings on a regular schedule? Is everyone invited?
- Ensure the collegiate chapter pays rent in full and on time.
- Review your budget. Do you have a budget to begin a capital campaign or a capital project? The Fraternity recommends the alumnae chapter and/or collegiate chapter bear the cost of fundraising.

Develop Alumnae Relations

How connected are your alumnae with the local chapter, alumnae chapter and house association? Your alumnae will serve on your Campaign Committee, be donors, solicit donations from other alumnae and volunteer in many capacities during this process. There are things you can do now to make it easier to ask for help from alumnae later.

- Contact International Headquarters and obtain a list of your chapter's alumnae. (Procedures are listed in the *Alumnae Leadership Manual*.) Begin finding those lost sisters! Build on your current alumnae involvement through positive outreach. Help alumnae become reconnected with each other.
- Be sure the alumnae chapter and house association contact information are available on the collegiate chapter's website.
- Visit AlphaGam Access for ideas to improve alumnae relations.
- Work quietly. Do not announce a potential capital campaign in your alumnae chapter newsletter. You'll be determining if a campaign is right for you and raising a significant portion of your campaign goal before you make a general announcement to your members. You may be limiting the size of your gifts by announcing too soon.

Even if you decide a building project or a capital campaign is not right for you at this time, you will have established new connections, renewed energy and increased dedication to the chapter among your alumnae members.

Develop a Compelling Case

You will need to clearly communicate a compelling case to your donors. Ask yourself:

- Why do you need to make capital improvements?
- Are your needs valid?
- Are they realistic?

Your alumnae need to see the project is necessary for the chapter. Begin developing a vision you can share with them to show how the chapter and alumnae will benefit.

Also assemble a list of any awards and accolades received by the collegiate chapter, alumnae chapter and house association.

Review your future budget. Once your new facility is built or renovated, can you afford the expenses, and can your members afford to live there?

Leadership

The pre-campaign planning period is the time to seriously evaluate your leadership's commitment to the campaign. Here are some questions to ask your house association board:

- Are all positions on the house association board filled?
- Do you have the right people in place?
- Who else should be involved?
- If they are not there already, how can you involve the right people in the house association's vision?
- Are involved volunteers ready to make a financial and time commitment to the project?
- Who might you ask to be "Class Chairs" representing a pledge class or range of pledge classes?

Research Your Project Team

Take time to research options for the professional assistance you will need for a successful project. Interview companies and check references. Begin investigating the following:

- Lender
- Architect
- General Contractor
- Fundraising Consultant

If there have been other renovation or construction projects on your campus, ask other house corporation officers for vendor recommendations. The Alpha Gamma Delta Foundation office has a list of fundraising consultants and other vendors who have supported house corporations in the renovation or construction of chapter houses on college and university campuses.

Conclusion

Taking time now to prepare for a capital campaign will increase your opportunity for success.

Once the time is right for a renovation, rebuild or purchase, the next step is hiring a professional fundraising firm to conduct a campaign feasibility study or a development audit. The items above should be accomplished before you conduct a campaign feasibility study.

For More Information

As a component of its commitment to education, the Alpha Gamma Delta Foundation assists universities in providing facilities and educational equipment which support academic success. It does so through its Educational Area Grant Program. While there are IRS restrictions, this program can serve as a significant and beneficial component of a local fundraising campaign in relation to donors for whom a tax benefit is important.

More information, can be found on the Foundation’s website or by contacting:

Alpha Gamma Delta Foundation
 8710 North Meridian Street
 Indianapolis, IN 46260
 317.663-4242

foundation@alphagammadeltafoundation.org

This sample timeline is provided as an overview of the capital campaign planning and execution process. Your house association may progress at a different pace through the timeline depending upon your needs and readiness. Each professional consulting firm will have a slightly different process and timeline for a feasibility study.

<p><i>Pre-Feasibility Study or Pre-Development Audit</i></p>	<input checked="" type="checkbox"/>	<p>2nd month</p>	Evaluate House Association Efficiency
	<input checked="" type="checkbox"/>		Develop Alumnae Relations
	<input checked="" type="checkbox"/>		Evaluate Your Leadership Develop a High-Quality Case Statement
	<input checked="" type="checkbox"/>		Begin identifying and interviewing vendors. Contact the Foundation office for recommendations.
	<input checked="" type="checkbox"/>		Commission a campaign feasibility study or a development audit.
<p><i>Feasibility Study</i></p>	<input checked="" type="checkbox"/>	13th month	Work with your chosen consulting firm to determine readiness for a capital campaign.
	<input checked="" type="checkbox"/>	18th month	Feasibility study, development audit, planning study conducted
	<input checked="" type="checkbox"/>	22nd–24th month	Review the results of the feasibility study. Determine house association next steps.

Campaign	☒	3rd year	<p>Leadership or Silent Phase of Campaign</p> <p>Finalize case statement and plans</p> <p>Train campaign volunteers</p> <p>Begin the leadership or silent phase of the campaign</p> <ul style="list-style-type: none"> • Have board members make their gifts • Begin solicitation of top prospects • Recruit and train Class Chairs <p>Reach 50-60% of your goal before your public phase</p>
	☒	Mid-3rd or 4th year	<p>Public Phase of Campaign</p> <ul style="list-style-type: none"> • Utilize mail and e-mail • Continue face-to-face solicitation • Utilize Class Chairs • Host larger, public events • Break ground • Process gifts and pledges
Stewardship	☒	5th -7th year	<p>Celebrate!</p> <p>Continue stewardship and fulfillment of pledges and gifts</p>