



Teton Valley Aquatics
Campaign Assessment Report
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Introduction

Teton Valley Aquatics and the City of Driggs contracted with Pathfinder Philanthropy Advisors (PPA) in March 2017 to conduct a Campaign Assessment of its readiness to undertake an \$11.5 million capital campaign. The purpose of the Campaign Assessment was to assess the following factors that are critical to the success of a campaign.

- Vision for the Future
- Urgent and Compelling Case
- Available Prospects
- Volunteer Leadership
- Adequate Resources

Implementing the Campaign Assessment

1. Preliminary Case Statement: In early 2017 the Teton Valley Aquatics Board of Directors articulated the Preliminary Case Statement outlining a potential plan for an \$11.5 million Capital Campaign for a new aquatic center for Teton Valley, Idaho. The Preliminary Case Statement was used as the basis for discussion during the confidential interviews.
2. Study Participants: Teton Valley Aquatics identified a group of interview candidates for face-to-face or phone interviews.
3. Interviews: During the month of April and May 2017, Elaine Walsh Carney and Carter Cox conducted a series of 42 personal and confidential interviews. Of the 42 interviews, 16 were conducted face-to-face and 26 were conducted by phone. Elaine conducted 28 interviews and Carter conducted 14.

Results

The results of these confidential interviews have been statistically compiled, graphically presented and analyzed in this report. The observations and recommendations that are central to this report are driven by the data and reflect the thoughtful participation of those interviewed and the experience of PPA in directing successful capital campaigns.

CAMPAIGN ASSESSMENT QUESTIONS

1. How do you perceive Teton Valley Aquatics' image?
2. Do you understand Teton Valley Aquatics' need to raise funds as described in the Preliminary Case Statement?
3. Describe the strengths and weaknesses of the plan and objectives.
4. Do you believe the \$11.5 million goal is attainable?
5. Where would this project fit into your philanthropic priorities?
6. Will you personally consider making a gift in support of the objectives identified?
 - a. If so, at what level would you make a gift?
 - b. If not, why?
7. Will you consider assisting the organization as a volunteer in this campaign?
8. Who do you think is the best person/persons to lead this campaign?
9. How would you describe the fundraising ability of the Board?
10. How would you describe the fundraising ability of Kelly Sadauckas?
11. Do you believe that Teton Valley Aquatics' constituency will be receptive to this campaign?
12. How well does Teton Valley Aquatics communicate with its constituency?
13. Do you believe Teton Valley Aquatics should proceed with plans for a campaign in support of the objectives identified in the Need Statement?
14. Additional Questions or Comments?

SIGNIFICANT ISSUES

This study brought to the surface a number of issues, positive and negative, which will have an impact on the successful completion of an \$11.5 million Capital Campaign for Teton Valley Aquatics. These observations are a direct result of the information received through the interview process and help to shape the recommendations that follow.

- Teton Valley Aquatics enjoys a positive image among the study participants. They strongly believe in the organization's vision to provide an aquatic facility that will enhance the overall health, wellness, safety, recreational opportunities and quality of life for all Teton Valley residents and visitors. While TVA enjoys a solid reputation with their constituency, they are not well understood in the broader community.
- Ninety-five percent (95%) of interviewees understand the need to raise the funds to proceed with the pool facility. Some questioned the size and scope of the project, suggesting that the proposed facility would be more successful as a public/private partnership.
- Several participants emphasized the need to keep the messaging simple and to communicate how this facility will make Teton Valley and the surrounding communities a better place to live. TVA must tell a broader story in order to reach and inspire more of the community.
- Interviewees were impressed with the Preliminary Case Statement. Some individuals wanted to know if TVA is working on a "Plan B".
- An \$11.5 million campaign for TVA is considered to be a considerable challenge at this time. Respondents believe that an \$11.5 million campaign might be possible if there were several multiple 7 – figure donors to lead the campaign.
- Although some of the study participants are willing to make a gift to a campaign in support of the new facility, the levels of gifts that were self-identified during the study process were not enough to support an \$11.5 million campaign.
- The Board's fundraising potential is perceived to be unknown and likely limited. Interviewees believe that the \$11.5 million goal to be far above their ability.
- Kelly is well respected and is seen as a passionate and articulate spokesperson for TVA. While it is clear that Kelly is held in high regard among the study participants, her practical implementation ability in the fundraising context is unknown.
- Seventy-two percent (72.2%) of interviewees believe that the TVA's constituency will be receptive to a community pool. Whether that support would convert to financial support is unknown.
- Participants noted that TVA should broaden the message to better tell the "big picture story" in order to successfully reach the community beyond the current stakeholders.
- When asked if TVA should move forward with a campaign, the 51.3% of study participants said yes, stating that TVA should move forward with developing a new facility. 43.6% were unsure,

mostly due to the \$11.5 cost and questions around TVA's ability to raise those funds to support this project.

RECOMMENDATIONS

The following recommendations have been derived from an analysis of the statistics, a consideration of comments provided by the study participants and the experience of Elaine Walsh Carney and Carter Cox. These recommendations are specific to Teton Valley Aquatics.

1. Build organizational capacity to support, promote and implement the vision and mission of Teton Valley Aquatics.

- a. Hire an experienced and well-connected Executive Director;
- b. Develop a Strategic Plan that considers the results of this Assessment;
- c. Build Philanthropy Capacity of the TVA Board by including more members with experience in key strategic areas: especially business, fundraising and marketing skills;
- d. Implement swimming-related programs that directly benefit the Teton Valley Community this summer;
- e. Set goals for annual fundraising for the next three years which correspond with the Strategic Plan.

2. Convene a Development Committee to support the work of the Executive Director

To oversee and to assume ownership of this fundraising initiative, a Development Committee should be convened to include 5 -7 community members with enthusiasm for the project and major gift fundraising experience. The Development Committee will ideally be comprised of key members of the TVA community who are willing to support the implementation of the Strategic Plan. A local Development Committee must focus on building and implementing a team approach to both the fundraising and community outreach programs in order to meet the long-term goals of the organization.

The Development Committee will:

- Oversee the creation and implementation of the updated Strategic Plan;
- Assist in developing a simple, clear and compelling Case for Support;
- Initiate a peer review program to identify and qualify prospects;
- Provide assistance in the solicitation of key prospects;
- Identify, cultivate and enlist additional development volunteers;
- Provide initial commitments that will set the example for others to follow.

3. Offer programs to a cross section of the community and broaden Marketing and Community Outreach.

Develop a clear communications strategy that broadly outlines all areas of the TVA's work and articulates measureable results. In order to achieve the quickest success, TVA should develop a few programs this summer to raise the community's awareness of the organization. Include video and social media to further promote the work.

To heighten awareness between both the current donor base and potential prospects, a series of personal interactions must be planned. These can take many forms including one-on-one meetings, small group gatherings or large group cultivation events. It is recommended that these events be small and include the major gift prospects that participated in the study. As the annual fund fundraising effort progresses, cultivation can be broadened to be more public and reach more people.

In order for TVA to build a strong major gift fundraising program, the Development Committee and Staff Team must allocate time and staff resources to this effort. Special events are wonderful cultivation tools and are particularly helpful and effective when staff and Board follow up with donors after a successful event to solicit a major gift.

4. Focus on creating an organizational "Culture of Philanthropy" by making the work of the Development Committee a top priority for the Board.

Focus on increasing fundraising capacity on an ongoing annual basis. Donor cultivation and awareness, major gift success, an increase in annual support and the addition of a staff leadership position will result in a more effective and efficient fundraising system for TVA.

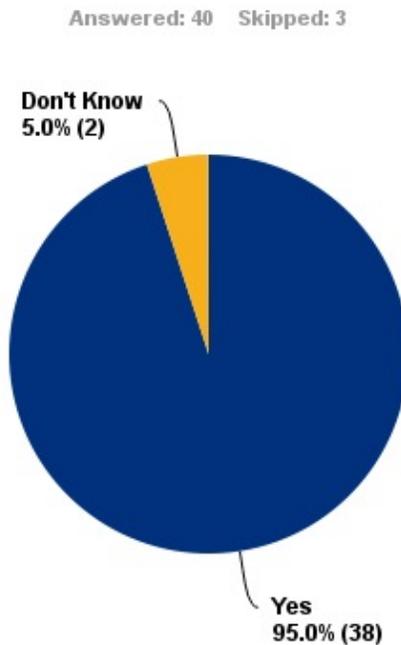
5. Consider partnering with an existing pool to facilitate year-round pool facility access at specified times.

How do you perceive Teton Valley Aquatics' Image?

Analysis

Overall, Teton Valley Aquatics (TVA) has a positive image amongst the interviewees. Several noted that much of the Teton Valley Community seems to be unaware that TVA exists. Individuals that are aware of TVA are supportive of a public, year-round pool. Some commented that public funding would be difficult to obtain, with the upcoming bond for the local public schools. Many also commented on the significant challenge a fundraising campaign of this size will be in Teton Valley, Idaho at this time. Many people commented that TVA could provide an essential facility to the community and has done a good job with the recent community survey, which has increased community awareness of the organization. Going forward, there is significant room for improvement with communication of the services and resulting benefits that a TVA facility will provide to the community. A clear message around public funding opportunities would also improve the community's understanding of the funding big picture.

Do you understand Teton Valley Aquatics' need to raise funds as described in the Statement of Need?



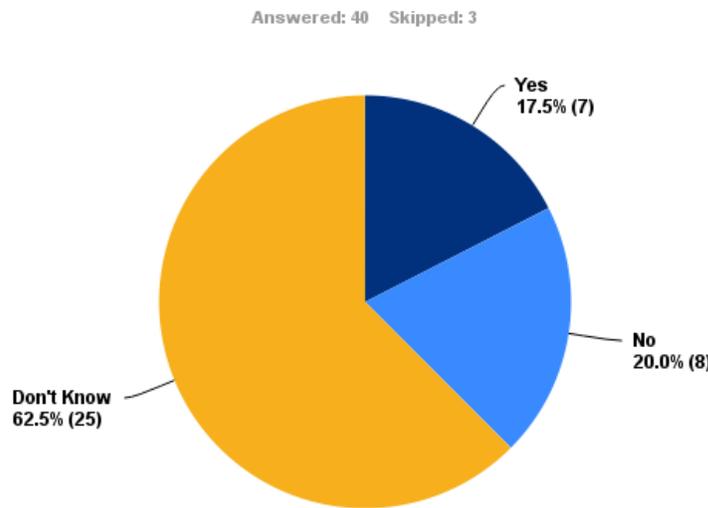
Analysis:

95% of individuals interviewed understand the need to raise the funds to support a facility for Teton Valley Aquatics. Generally, participants like the goals of the project and believe that a new facility will allow TVA to provide indoor, year round and healthy recreational opportunities to the community. Many question that this is possible with philanthropic funds.

Describe the strengths and weaknesses of the plan and objectives.

While there was significant theoretical support for a community pool, there was much hesitation and many unknowns around TVA's ability to raise the \$11.5 million proposed in the Preliminary Case Statement. Both TVA's ability to raise the capital to develop the proposed facility and concerns around projected operating costs of a completed facility were significant barriers to a potential pool facility in Teton Valley, Idaho at this time. While it is clear that many community members would likely use a future pool facility, few participants were confident that TVA could raise the philanthropic funds. Several participants mentioned the future possibility of a Recreation District to build the community pool facility with additional amenities such as a rock gym, a teen center and a bowling alley.

Do you believe the \$11.5 million goal is attainable?

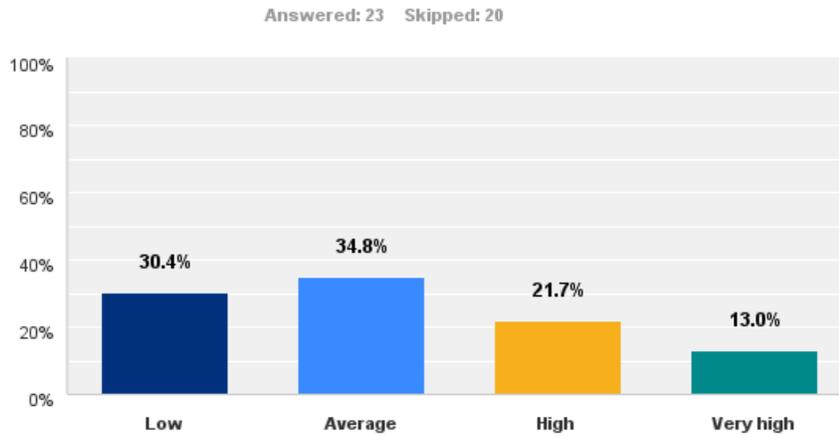


Analysis

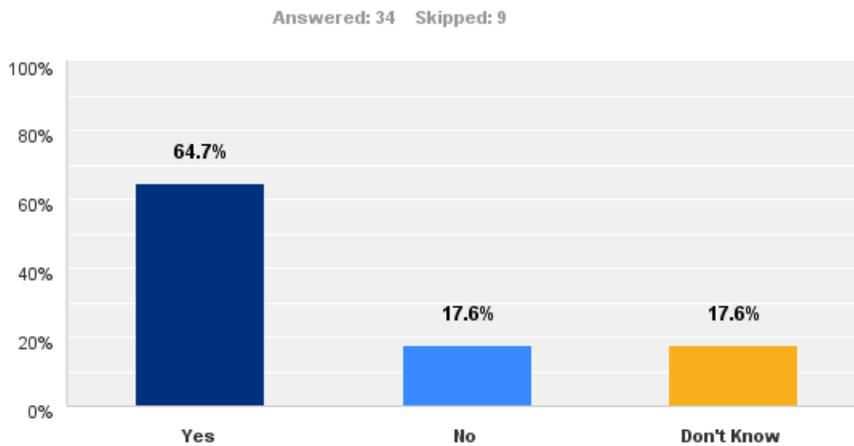
When asked if TVA is capable of successfully completing an \$11.5 million campaign, 20% of the participants said no and 62.5% of participants did not know if this goal could be achieved. There is a great deal of uncertainty regarding the attainability of gifts in the gift chart, particularly at the lead and major gift levels. The general sense is that while there could be prospects in the Teton Valley, Idaho community that have the capacity to make top and lead gifts to this campaign, but they are unsure if TVA has strong enough relationships with potential donors to encourage their participation.

Because the project will benefit the broader community, interviewees believe that some community philanthropists could be compelled to support TVA on a smaller level. Several participants mentioned that the majority of the funds would most likely come from a handful of major gifts, from known philanthropists and businesses in the community.

Where would this project fit into your philanthropic priorities?



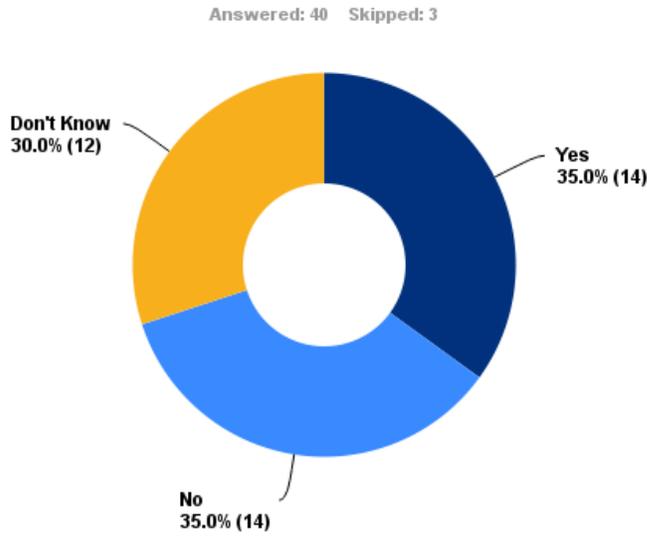
Will you personally consider making a gift in support of the objectives identified?



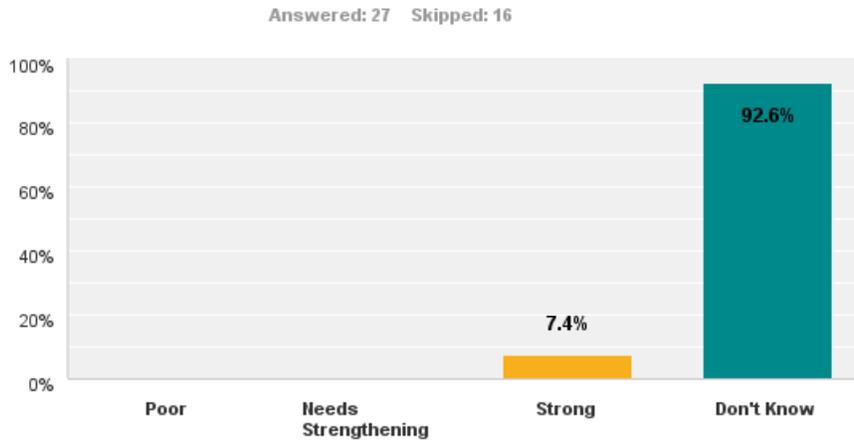
Analysis

Because of a lack of major gift fundraising in the past, coupled with a general lack of community capacity and awareness, TVA is not seen to be an organization with significant fundraising capacity. The recent survey process has raised TVA's community awareness, but TVA's capacity to raise significant philanthropic support is largely unknown at this time.

Will you consider assisting the organization as a volunteer in this campaign?



How would you describe the fundraising ability of the Board of Trustees?

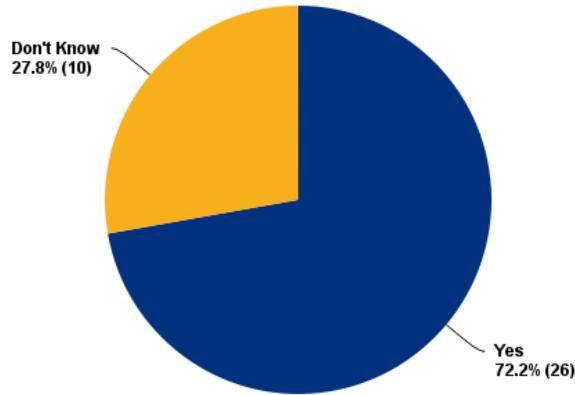


Analysis:

Due to the lack of a local volunteer board with previous activity in the fundraising context, these responses were not a surprise. TVA needs to convene a group of leaders to support TVA going forward and focus on raising community awareness through offering affordable pool activities to the community to build a larger base of supporters.

Do you believe that Teton Valley Aquatics' constituency will be receptive to this campaign?

Answered: 36 Skipped: 7

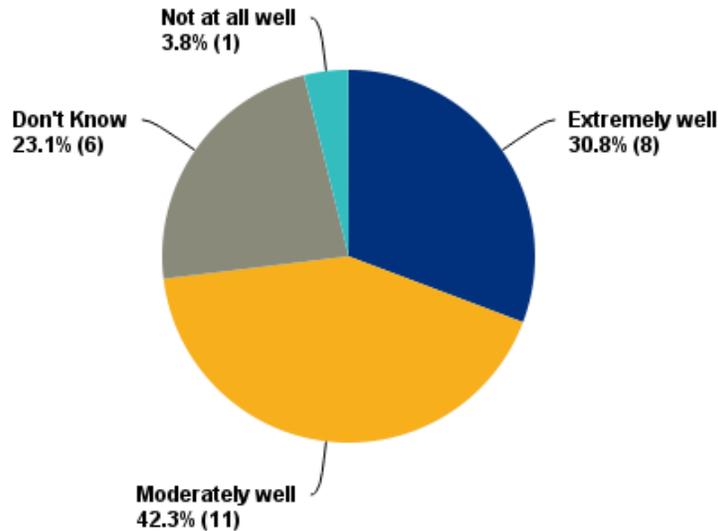


Analysis:

72.2% of participants felt that the community would be receptive to this effort, but there were many people that said that the community does not have the philanthropic capacity to support this project.

How well does Teton Valley Aquatics communicate with its constituency?

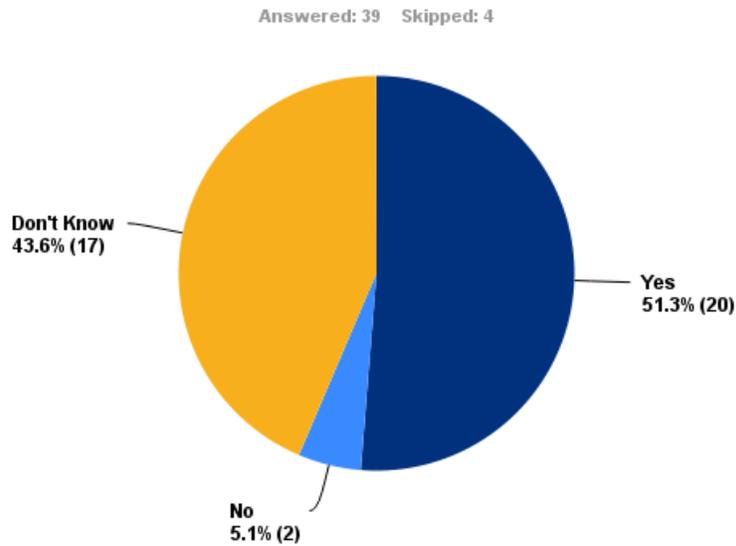
Answered: 26 Skipped: 17



Analysis:

Responses to this question were mixed, but generally people felt that TVA has done good job to date with the community survey and with communicating the basic information.

Do you believe Teton Valley Aquatics should proceed with plans for a campaign in support of the objectives identified in the Need Statement?



Analysis

51.3% of those interviewed believe that TVA should proceed with a campaign at this time and 43.6% are unsure. There is significant hesitancy among study participants regarding the organization’s ability to implement an \$11.5 million philanthropy campaign. Several people mentioned the need to pursue a public private partnership and pursue funding from the entire community for this facility, not just philanthropists. The broader community needs to participate in and invest in this facility.

A few respondents commented on the need for a compelling case for support that communicates the “high-level outcomes” of the campaign and emphasized the importance of telling the TVA story in a more holistic and inspiring way.