



Robert and Dorothy Ludwig

SCHENECTADY JCC

on the Golub Family Campus

Campaign Study Committee

Final Report

August 2, 2021 | 6:00 p.m.

<https://us02web.zoom.us/j/82314468392>



Robert and Dorothy Ludwig
Schenectady JCC
GOLUB FAMILY CAMPUS
For you, your family and your community

CCS
FUNDRAISING

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EXECUTIVE SUMMARY

Tom Kissane
Principal and Managing Partner, CCS Fundraising



THE SJCC IS POSITIONED TO MOVE FORWARD

OVERALL PERCEPTIONS

1. **The SJCC is well-positioned:** There is clarity the organization can move forward with the planning phase of a capital campaign.
2. **There is admiration for the SJCC's programming and staff. Interviewees share a vision for modernization:** Staff and leadership were endorsed by participants and potential for campaigning is rooted in the study respondents' deep admiration for programming, particularly that of the Early Childhood Programs, and its value as a cherished asset of the community. Interviewees identified the pressing need to modernize facilities.
3. **The SJCC faces unique challenges:** The special challenges identified include the retention of families as children age-out of programming, the ability to appeal to a diverse group of members, and the need for accessible and ADA-compliant facilities.

CASE FOR SUPPORT

4. **A case for support focused on Ensuring the Well-Being of Children and Families and attention to facility upgrades will provide a strong platform:** The case should focus on Early Childhood Programming and significant capital improvements, as these initiatives are viewed by respondents as the most-pressing. These priorities are offer the best opportunity for increased membership.
5. **Provide clarity surrounding the SJCC's place as a resource for the Jewish community:** The case should define the Center's mission and strengthen the balance between the SJCC as a place that embraces and upholds Jewish values and one that provides an open door for a diverse community.



CLEAR PLANNING AND MESSAGING PROVIDE A ROADMAP

GOAL SETTING

6. **Consider a working goal of \$3-3.5 million and determine the final goal only after receipt of the first 15 gifts:** The working goal should remain through the silent phase of the campaign, at which point it will be reassessed to determine the formal campaign announcement.

TIMELINE

7. **Develop a timeline over two years and execute along parallel tracks of activity:** To maximize philanthropic potential, the campaign will likely take upwards of two years to facilitate (with pledges paid over a five-year period). CCS recommends an expansion of the Study Task Force into a Campaign Executive Committee, while working to secure the first fifteen leadership gifts over the next nine months.

CAMPAIGN LEADERSHIP

8. **Formalize a Campaign Committee structure:** Transition the Study Task Force towards a formalized Campaign Executive Committee tasked with campaign design and prospect identification.

PROSPECT READINESS AND ENGAGEMENT

9. **Deploy the SJCC team to cultivate and solicit cohorts of donors to drive activity:** In the coming months, leadership should prioritize introductions with top prospects and make-up for cultivation unable to be performed due to the COVID-19 pandemic.

RESOURCE THE CAMPAIGN

10. **Determine an appropriate campaign budget:** The budget should be governed by industry standards and best practices, and take into consideration the role of the staff, leaders, and campaign counsel.



CORE INTERVIEW FINDINGS

Tom Kissane

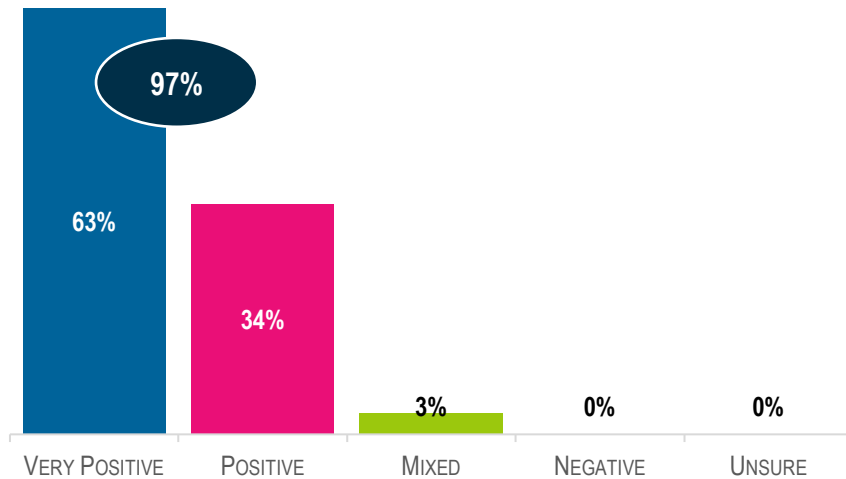


JEWISH COMMUNITY CENTER OF SCHENECTADY

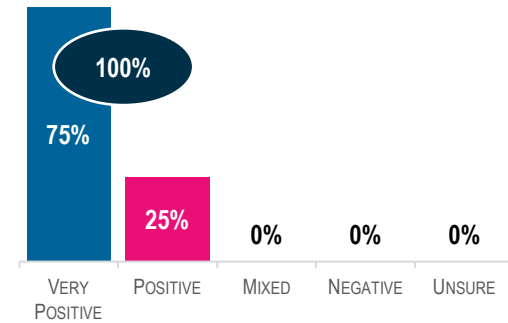
THE SJCC IS HIGHLY REGARDED AND WIDELY VIEWED AS A COMMUNITY ASSET

What is your overall perception of the Schenectady JCC?

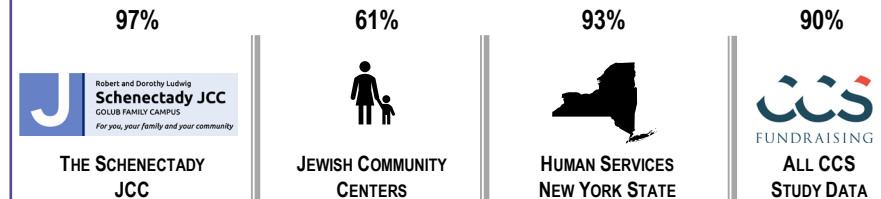
97% of those who responded expressed a “very positive” or “positive” perception of the SJCC.



SJCC BOARD OF DIRECTORS

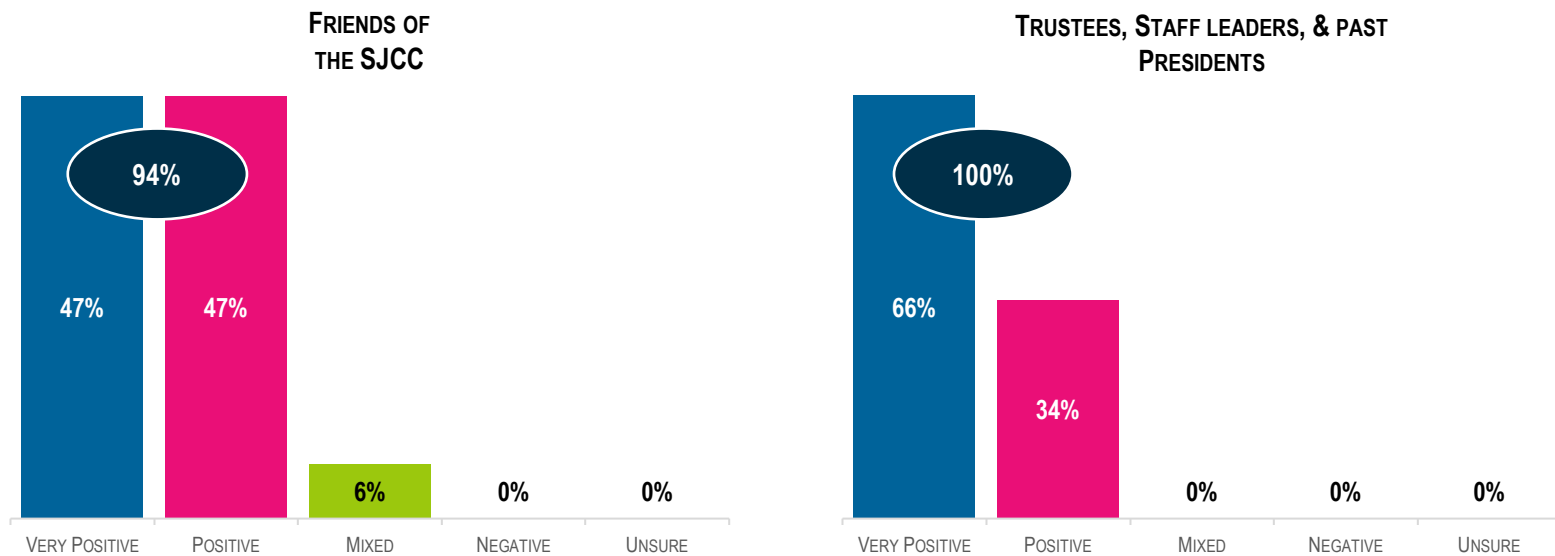


OVERALL PERCEPTION OF INSTITUTION



THE SJCC IS HIGHLY REGARDED AND WIDELY VIEWED AS A COMMUNITY ASSET

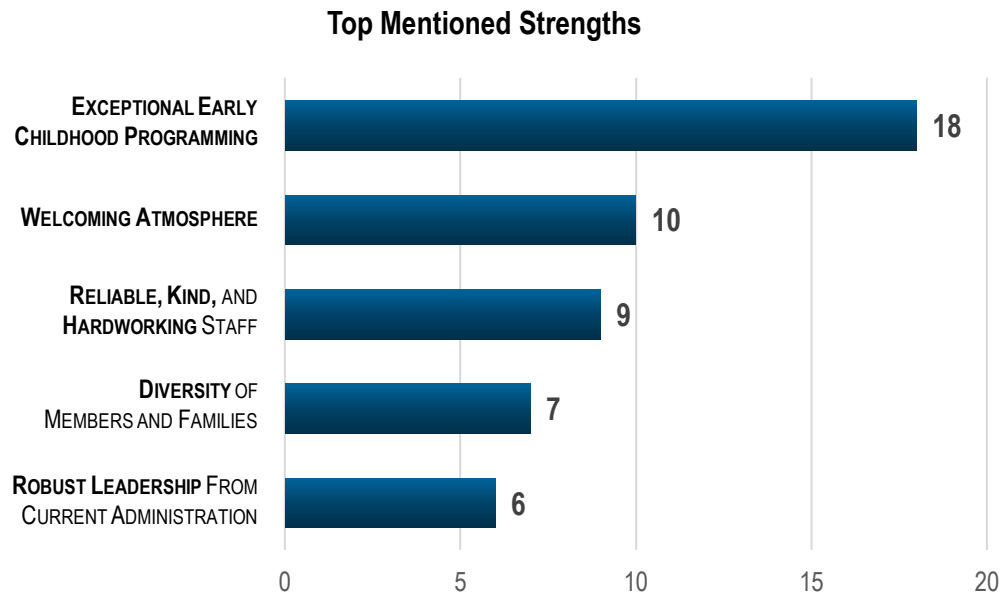
Overall perceptions can be divided out by constituency.



THE SJCC IS KNOWN FOR A WELCOMING ATMOSPHERE AND EXCEPTIONAL EARLY CHILDHOOD PROGRAMMING

What are the top strengths of the Schenectady JCC?

Respondents are impressed with various components of the Center's offerings and were particularly impressed by its **Early Childhood Programming** and the **welcoming atmosphere** perceived by a wide variety of community members.



Representative Quotes

"The word 'community' is what the Center is all about."

- Friend of the SJCC

"The Campus Director has been a wonderful and amazing constant."

- Friend of the SJCC

"The daycare was flexible for my family when I needed them to be."

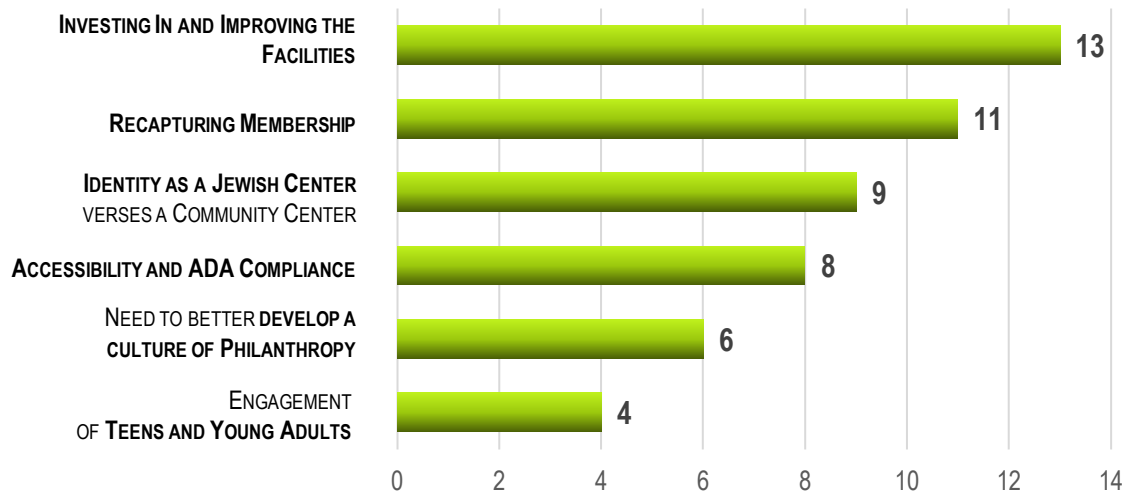
- Board Member



INVESTING IN INFRASTRUCTURE AND MEMBERSHIP ARE CONCERNS

Interviewees noted **membership recruitment and greatly needed upgrades to infrastructure and facilities as the primary challenges.** Furthermore, participants encouraged the Center to clearly define its mission as a Jewish Community Center and reassess the accessibility of the campus.

Top Mentioned Challenges



Representative Quotes

"Health and wellness programs or a speaker series could draw members in."

- Board Member

"It worries that someday I may not be able to enjoy the place that I love due to physical accessibility needs."

- Friend of the SJCC

"The JCC is so well-positioned to bring the youth of the community together."

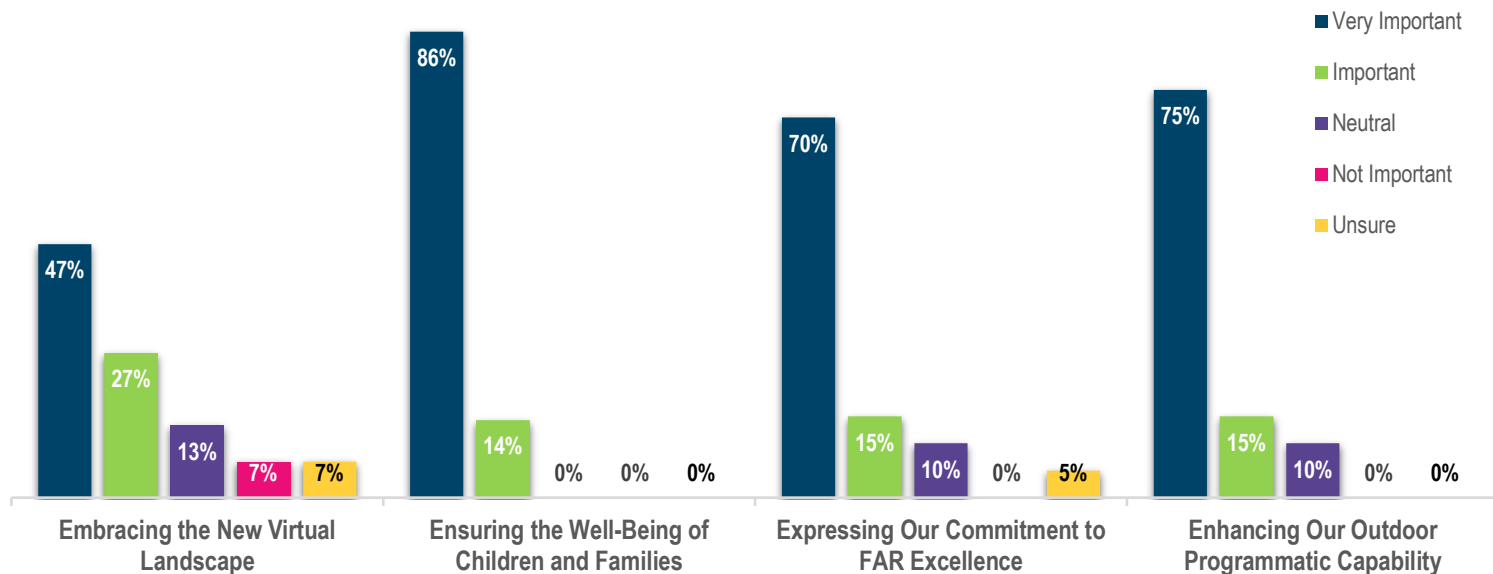
- Friend of the SJCC



THE CASE RESONATES WITH INTERVIEWEES

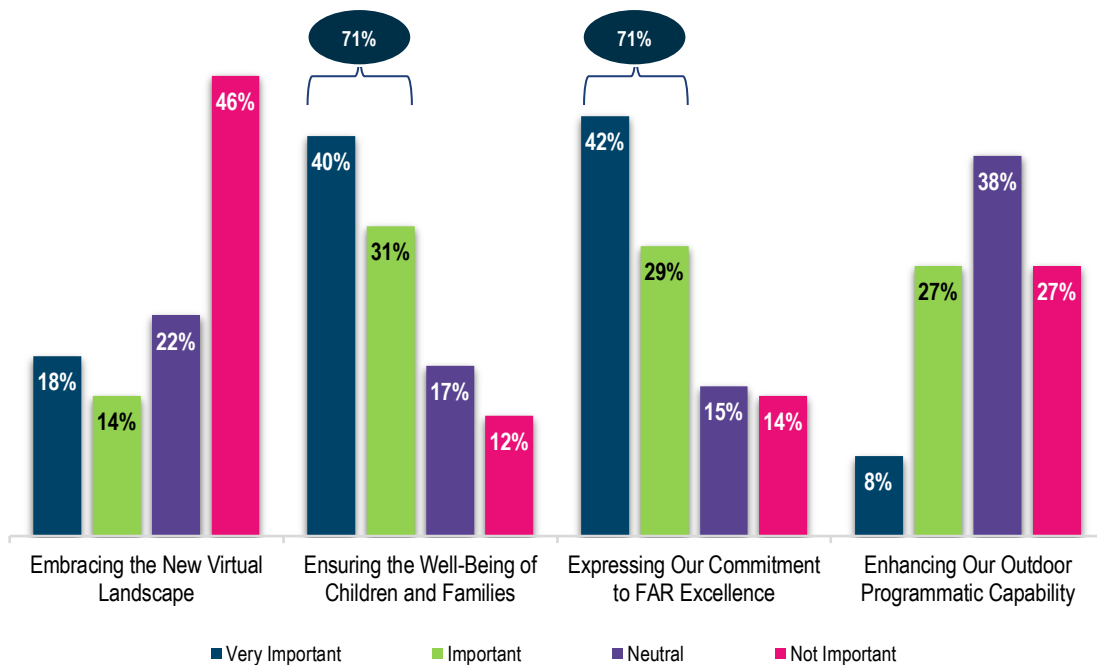
Interviewees view the case as the correct current priorities.

1. Interviewees endorsed **the case components as pragmatic and reflect the desire for growth of membership.**
2. Additionally, interviewees indicated the case elements are targeted to the correct priorities. Specifically, **Ensuring the Well-Being of Children and Families was seen as most compelling and ranked highest (most important)** across all constituencies.
3. **Embracing the New Virtual Landscape and Expressing Our Commitment to Fitness, Aquatics, and Recreation (FAR) Excellence** will likely require the most clarity when the case is finalized.



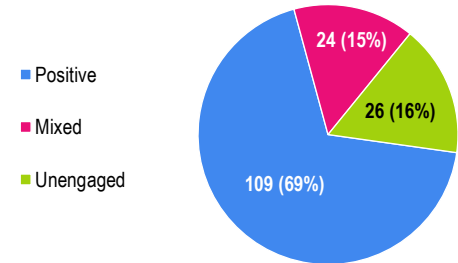
E-SURVEY RESPONSES REINFORCED INTERVIEWEES' PERCEPTIONS OF THE CASE AND THE SJCC

Responses to the e-survey were generally in-line with interview results, with fitness programming testing similarly to childhood programming. In total, **232 individuals responded, a 5.4% response rate.**

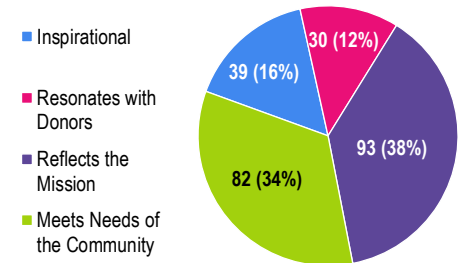


Note: E-Survey Respondents ranked the case components on a scale of 1 to 4 (1 being the most important), while Interviewees could express a “very important” reaction to multiple components.

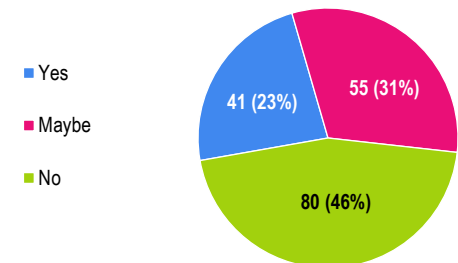
Overall Perception of the SJCC



Perception of the Background Statement



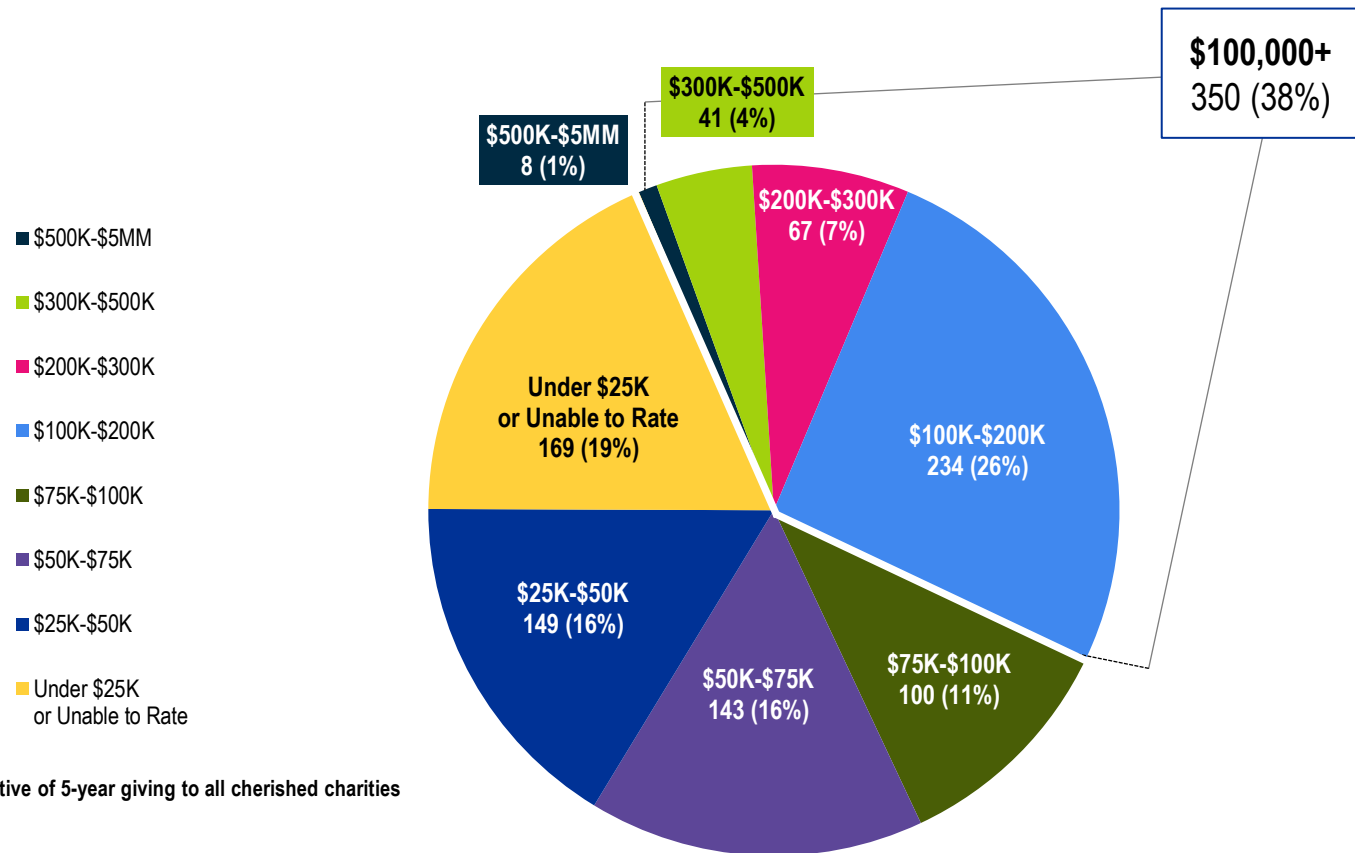
Willingness to Volunteer



38% OF PROSPECTS HAVE GIFT CAPACITY OF \$100K OR ABOVE

According to WealthEngine, there are 742 SJCC prospects (81%) with a gift capacity rating of \$25,000+.

350 prospects have a gift capacity rating of \$100,000+.



THE SJCC IS WELL-POSITIONED TO LAUNCH A CAMPAIGN

#	FINDING	DETAILS
1	The SJCC's positive perceived value is the foundation on which a successful campaign will be built	<p>97% of participants have a very positive or positive impression of the center citing the following key strengths:</p> <ul style="list-style-type: none"> a) The SJCC is a well-respected entity of the community, and a place that welcomes all who comes through its doors b) The center boasts a dedicated leadership team and staff who are reliable, kind, and hard-working. c) The SJCC is the go-to place for childcare and has maintained this reputation for decades.
2	The case addressed the center's most pressing needs, but a reallocation of philanthropic funding would be beneficial	<p>Participants responded positively to all four (4) case pillars:</p> <ul style="list-style-type: none"> a) Ensuring the Well-Being of Children and Families is most compelling: 100% of respondents indicated that the childcare programming is "very important" or "important" and is seen as an immense strength and revenue driver b) Attention to facility upgrades also received wide support. When refining the case for support, participants requested specificity on capital projects and a reassessment of center accessibility features c) Participants expressed a need to re-examine the funding models, and agree that philanthropic priority should be directed towards ECE and Youth Programming
3	The timing is right to move forward	95% encourage SJCC to proceed now with a campaign , which is in line with other human services data from studies conducted by CCS
4	The goal will need to be adjusted	<p>31% of those who responded stated that a goal of \$5 million was realistic:</p> <ul style="list-style-type: none"> a) Philanthropic goals should be re-tailored to new, diverse membership.



INTERVIEWEES WILL BE ACTIVE IN A CAMPAIGN

#	Finding	Details
5	Untapped giving potential is present	<p>CCS performed a comprehensive review of historical fundraising at the SJCC, and wealth screened the entire database while performing a predictive modelling exercise.</p> <ul style="list-style-type: none"> a) 911 households were identified for wealth screening b) Of these 911 total households, 350 households returned a gift capacity rating of \$100,000 or more c) This is a positive indicator of philanthropic potential of the wider SJCC community
6	There is an openness to give	<p>94% of participants are willing to consider making a gift to the campaign.</p> <ul style="list-style-type: none"> • This a positive response, as this indication is above CCS's human services benchmark (90%)
7	There is a willingness to serve, but a hesitancy to solicit	<p>There is a strong willingness to provide leadership to a campaign by the SJCC community. Willingness to "serve as a leader" (74%) and "join a committee" (77%) were well above CCS's comparative benchmarking data. However, willingness to "open doors" (30%) or "solicit gifts" (59%) was lacking.</p>
8	Personal gift indications demonstrate a wider pool of donors must be considered	<p>67% of the interviewees offered a specific gift consideration and the total ranges valued \$1,196,000 to \$1,331,000</p> <ul style="list-style-type: none"> • 7 gift considerations have been received so far of \$25,000 or greater • The average high consideration is \$13,792 (excluding the outlier \$1 million gift) • Additionally, a further 117 e-survey respondents (50% of total) indicated a specific gift consideration, totaling an additional \$647,500 • Including e-survey results, there were indications totaling between \$1,843,500 and \$1,978,500



PRELIMINARY GIFT CONSIDERATIONS ARE PROMISING BUT DO NOT SUPPORT A GOAL OF \$5 MILLION FOR THE CASE PRIORITIES

*Of the 37 interviewees, **31 interviewees said they would give to the campaign**. Of these 31, **25 offered a gift consideration**, including **one confirmed gift at \$1 million**. An additional 117 e-survey respondents gave specific indications totaling \$647,500. These considerations are reflected in the table below.

	Gift Value	# Gift Considerations	Value of Gift Considerations (Low Range)	Value of Gift Considerations (High Range)	Cumulative Value
A	\$1,000,000	1*	\$1,000,000*	\$1,000,000*	
	"A" SUB-TOTAL	1	\$1,000,000	\$1,000,000	\$1,000,000
B	\$500,000	0	\$-	\$-	
C	\$250,000	0	\$-	\$-	
D	\$100,000	0	\$-	\$-	
E	\$50,000	1	\$-	\$50,000	
F	\$25,000	5	\$75,000	\$125,000	
	"B – F" SUB-TOTAL	6	\$75,000	\$175,000	\$1,175,000
G	\$15,000	4	\$30,000	\$60,000	
H	\$10,000 AND BELOW	14	\$91,000	\$96,000	
	"G – H" SUB-TOTAL	18	\$121,000	\$156,000	\$1,331,000
	INDICATIONS FROM "B – H"	24	\$196,000	\$331,000	
	INDICATIONS FROM E-SURVEY	117	\$647,500	\$647,500	\$1,978,500
	TOTAL	142	\$1,843,500	\$1,978,500	\$1,978,500

*A gift at this level has already been received

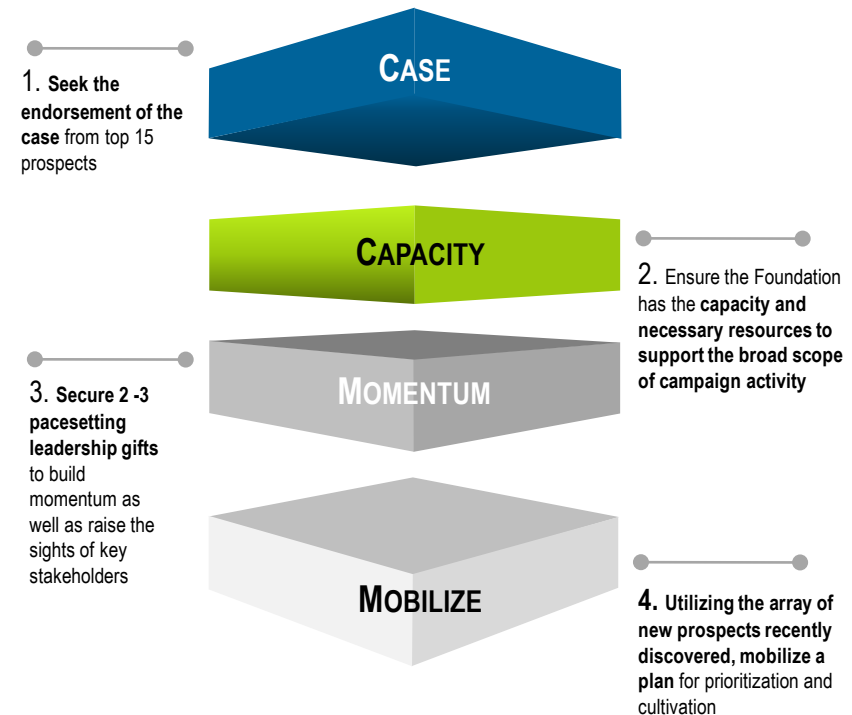


THE SJCC IS READY FOR A CAMPAIGN WITH A MODIFIED GOAL

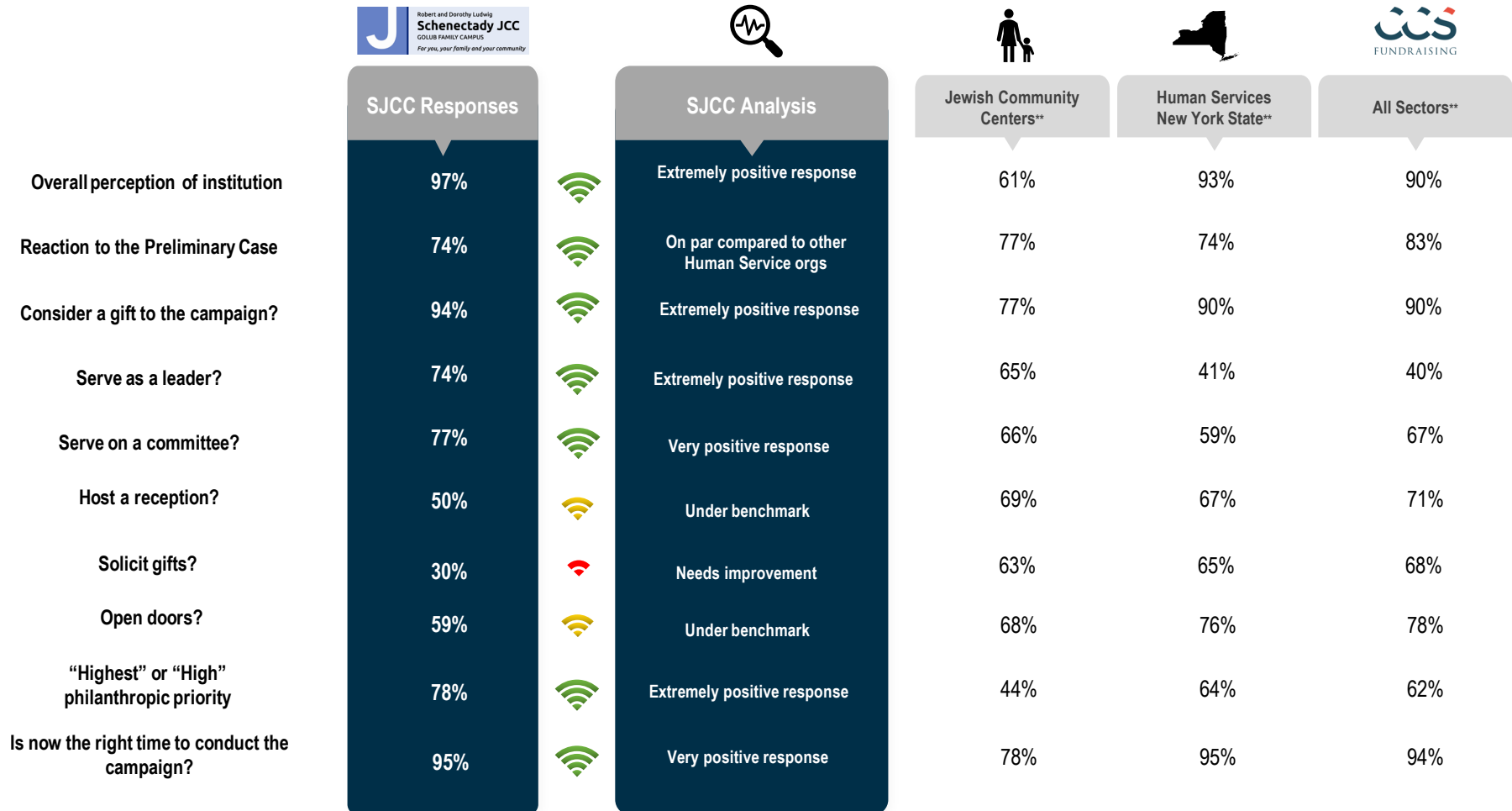
Based upon the following key indicators, CCS believes the SJCC is well positioned for a modified campaign

#	Key Marker	Current Condition
1	The SJCC possesses a positive brand and reputation	 IN PLACE
2	There is confidence in leadership	 IN PLACE
3	A compelling case is evident	 IN PLACE/ EMERGING
4	Interviewees expressed an interest in participating in a defined volunteer role	 IN PLACE
5	There is a willingness to take a defined leadership role	 IN PLACE/ EMERGING
6	The Board of Directors will provide financial support	 REQUIRES IMPROVEMENT
7	Interviewees expressed a willingness to make introductions	 REQUIRES IMPROVEMENT
8	There is a realistic sense of fundraising potential	 IN PLACE
9	Key prospects rate the center as a top philanthropic priority	 IN PLACE
10	There is a willingness to make a gift to support the campaign	 IN PLACE

Immediate Priorities (First 60 – 90 days)



THE SJCC COMMUNITY IS WILLING TO PROVIDE COMMITTEE LEADERSHIP, YET LACKS WILLINGNESS TO SOLICIT GIFTS



*Includes "yes" and "maybe" responses or "very positive" and "positive" responses.

**Based on CCS data from feasibility and planning studies.



CORE RECOMMENDATIONS

Carl Cervi
Senior Vice President, CCS Fundraising



INITIATE A PLANNING PHASE IMMEDIATELY

#	RECOMMENDATION	DETAILS
1	Proceed with a Capital Campaign	Move forward with the planning and silent phase of a campaign where the first nine months are focused on securing leadership (\$100,000+) and major (\$25,000+) gift commitments.
2	Consider an initial working goal of \$3-3.5 million* to be fulfilled over a 5-year pledge payment period	<p>Based on the receipt of pace-setting gifts during the first nine months of the campaign, a final determination should be made regarding the goal; criteria for this determination should include:</p> <ul style="list-style-type: none"> a) The outcome of the initial 15+ lead gifts to raise an additional \$1,500,000; b) The portfolio of the remaining six and high five-figure prospects; and c) Evaluation of overall fundraising activity during the major gift phase <p>*If these goals are not surpassed, the working goal may be reconsidered.</p>
3	Recruit and convene a Campaign Executive Committee from October 2021 to April 2023	<p>Engage a Campaign Executive Committee with the responsibility of overseeing the Campaign, including:</p> <ul style="list-style-type: none"> a) Refinement of the case for support; b) Development of the campaign plan, naming opportunities, and policies; c) Prioritization of top 50 prospects; and d) Identification and recruitment of volunteers <p>These leaders will spearhead the activity of the major gift phase, as well as specific divisional sub-committees. The CEC should convene for its first meeting in October 2021.</p>



REFINE MESSAGING AND DEVELOP A FORMAL CASE FOR SUPPORT AND OTHER CAMPAIGN COLLATERAL

#	Recommendation	Details
4	Refine the Case for Support	<p>Develop a formal, case for support and refine messaging based upon feedback gleaned from the study:</p> <ul style="list-style-type: none"> a) Align the case with a modified allocation of \$3-3.5 million towards the case components, realigning the pillars to reflect need for childcare programming, facility renovation, and accessibility b) Offer specific details on the capital projects, in particular renderings, construction timeline, and the overall benefits the projects will have for the community c) Demonstrate the role of the annual fund and educate donors on the distinction between annual versus extraordinary (capital) giving
5	Ensure a phase-by-phase approach	<p>CCS recommends the SJCC conduct the planning and quiet phase of the campaign over the next nine months until April 2022. Based on the campaign's traction, the public phase can commence in April 2022, ending in April 2023. The two-year campaign would culminate in a five-month wrap-up phase until August 2023.</p>
6	Create a request prospectus to garner early lead commitments as well as other communication materials to assist in educating and soliciting the wider community	<p>Based on the messaging of the Case for Support, develop a proposal to be used during early gift conversations with potential lead donors in line with priority prospects, rated, and sequenced in a moves management system. Create a robust list of recognition opportunities to encourage prospective donors to make stretch gifts and commitments to the campaign.</p>



IDENTIFY, RECRUIT, AND MOBILIZE LEADERSHIP WHILE MAKING NECESSARY INVESTMENTS IN CAPACITY BUILDING

#	Recommendation	Details
7	Build a Directorial Staff Subcommittee to identify grateful members and families	CCS recommends engaging staff leaders to assist in the campaign effort . This group would assist in the identification of potential grateful families, members, and community leaders, and assist in select solicitations when appropriate. Furthermore, this committee would oversee a brief “directorial staff” division of the campaign to encourage participation among JCC insiders .
8	Make the Campaign an organizational priority with the creation of a detailed timeline	SJCC leadership will need to invest the requisite time for this campaign to succeed . The Board of Directors, David Posner, Jessica Kilmade, and senior leadership will all be asked to dedicate significant time to this endeavor in the engagement of potential donors to make this a successful grassroots effort.
9	Establish a campaign budget	Set a campaign budget that considers the three main priorities, which are operational cost, personnel cost, and professional services to support all expenditures and activities required for success.
10	Invest in resources and capacity to appropriately equip the staff to run a successful campaign	A successful effort will require investments in staff, systems, professional counsel, branding, marketing, and communications .



PROCEED WITH A CAPITAL CAMPAIGN WITH AN INITIAL WORKING GOAL OF \$3-3.5 MILLION

A. The Schenectady JCC should proceed with an initial working goal of \$3-3.5 million.

i. The final goal should be determined based upon the receipt of the first 15 major gifts to the campaign.

B. A revised table of gifts to reflect a working goal of \$3.5 million appears as follows:

PLEDGE LEVEL	PROSPECTS NEEDED	GIFTS REQUIRED	PROVIDING	CUMULATIVE TOTAL
\$1,000,000	1*	1*	\$1,000,000*	\$1,000,000*
Sub-Total	1	1	\$1,000,000	\$1,000,000
\$250,000	5	3	\$750,000	\$1,750,000
\$100,000	15	5	\$500,000	\$2,250,000
Sub-Total	20	8	\$1,250,000	\$2,250,000
\$50,000	20	8	\$400,000	\$2,650,000
\$25,000	50	20	\$500,000	\$3,150,000
Sub-Total	70	28	\$900,000	\$3,150,000
Under \$25,000	200	100	\$350,000	\$3,500,000
Sub-Total	200	100	\$350,000	\$3,500,000
Total	291	137	\$3,500,000	\$3,500,000

*A gift at this level has already been confirmed



NEXT STEPS

Carl Cervi



NEXT STEPS

CCS recommends the SJCC moves immediately into a Campaign Planning Phase and considers the following next steps in the next three-to-four months:

1. **Refine the Case for Support**
2. Form a working group to **oversee case production and develop design of programs and build**
3. Identify and **recruit a Campaign Executive Committee**
4. Sequence **top 15 campaign prospects**

1. **Convene the Campaign Executive Committee for its first meeting**
2. Build Donor Cultivation, Engagement, and Solicitation Strategies:
3. **Catalog all naming opportunities.**
4. Determine **Campaign brand, title, and logo**
5. Initiate **key strategic solicitations**

AUGUST

SEPTEMBER-OCTOBER

OCTOBER-NOVEMBER

1. Craft **gift proposals**, solicitation letters and scripts
2. Create and draft a fundraising timeline with key financial markers and activity benchmarks
3. Devise **gift tables, leadership gift plans, giving policies, gift agreements, and overall policies on gift recognition and acceptance**



APPENDIX



ACKNOWLEDGEMENTS



ACKNOWLEDGEMENTS

CCS is grateful to the Schenectady JCC for the opportunity to conduct this Planning Study in preparation for a capital campaign. We thank David Posner, CEO, for his thoughtful leadership and support.

We extend our gratitude to the Study Task Force for their guidance and participation:

- Jack Gold
- Bryan Goldberger
- Aviva Hallenstein
- Steve Harding
- Amy Landauer-Ruder
- Jenn Lean
- Kathy Levy
- Richard Toll
- Barbara Walton

A special thanks to CEO Assistant and Board Liaison, Jessica Kilmade, for her efforts to support the planning study process and schedule all interviews.

THE CCS TEAM

Thomas Kissane

Principal and Managing Partner

Carl Cervi

Senior Vice President

Gina Borden

Director

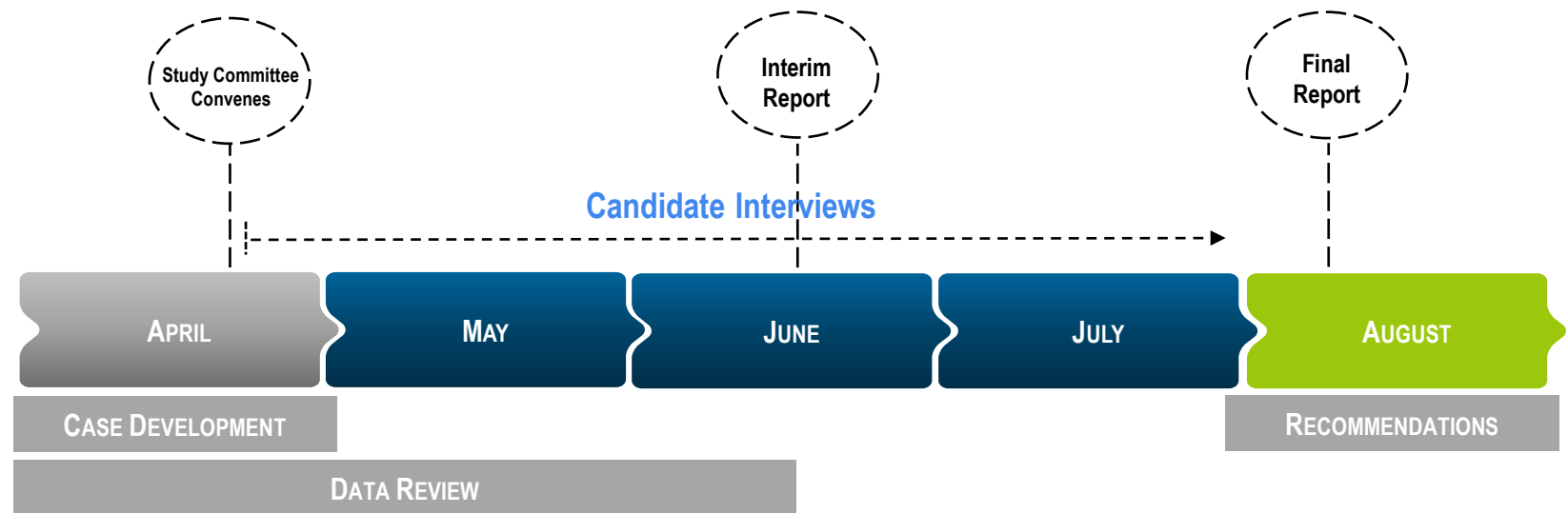


STUDY BACKGROUND AND PROCESS



PROJECT SCOPE

In April 2021, the Schenectady JCC retained CCS Fundraising to assess readiness, messaging, and community support for a capital campaign, and launch early engagement efforts to achieve a proposed \$5 million goal. The project was staged as below:



1: PREPARATION

Gather and analyze historic giving data to identify prospective supporters and develop preliminary case statement to test with key stakeholders.

2: ENGAGEMENT

Conduct conversations with key community leaders addressing perceptions about the center; rationale for a campaign; advice on goal; potential leaders, donors, and engagement strategies; and indications of personal involvement.

3: REPORTING

Deliver recommendations for executing the campaign and strengthening overall giving program, based on findings from stakeholder interviews and review of SJCC data.



OBJECTIVES AND OPERATIONAL TOOLS

The planning study sought to:

1. **Inform leaders and stakeholders** of the proposed plans and **test** a goal of \$5M during a 5-year period
2. **Seek feedback and advice** to effectively convey an inspirational campaign message
3. **Ascertain philanthropic interest of top donors** to support the campaign
4. **Invite donors to take a leadership role** in the campaign
5. **Accelerate donor cultivation** to position prospects to consider support
6. **Determine solicitation sequence** of the top 15 prospects

STUDY TOOLS PRODUCED

A. Preliminary Case Statement

B. Interview Questionnaire

C. Interview Request Letter

D. \$5 Million Gift Table

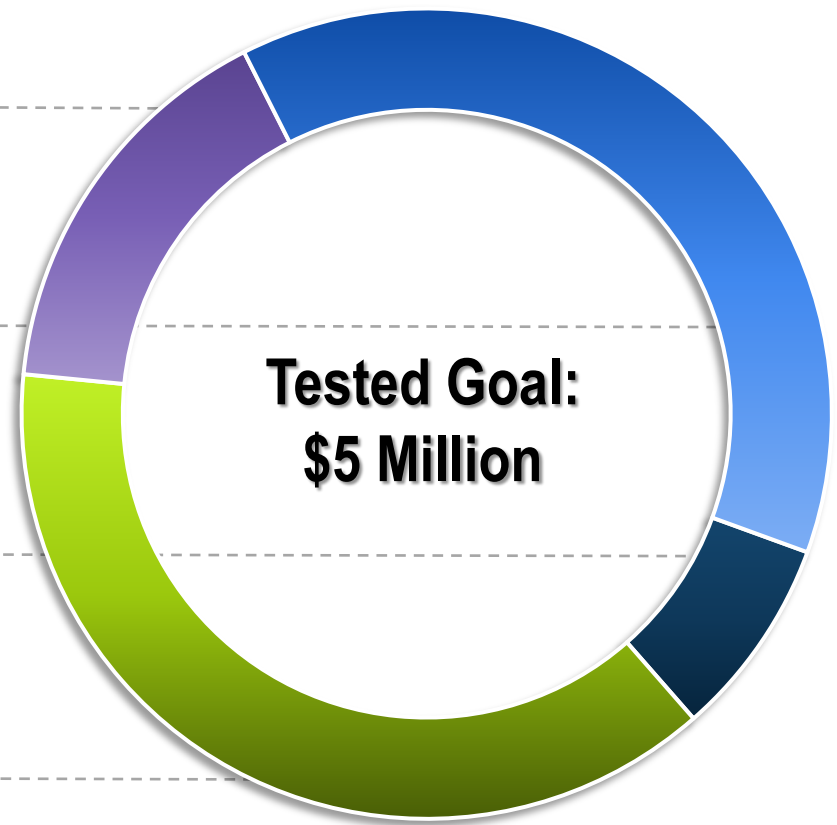
E. Interview Candidate List



PRELIMINARY CAMPAIGN CASE ELEMENTS

Conversations were used to test the feasibility of a major fundraising campaign – a \$5 million goal to achieve the following:

- **ENSURING THE WELL-BEING OF CHILDREN AND FAMILIES**
\$800,000 (IN PHILANTHROPY)
- **ENHANCING OUR OUTDOOR PROGRAMMATIC CAPABILITY**
\$1,900,000 (IN PHILANTHROPY)
- **EMBRACING THE NEW VIRTUAL LANDSCAPE**
\$400,000 (IN PHILANTHROPY)
- **EXPRESSING OUR COMMITMENT TO FAR EXCELLENCE**
\$1,900,000 (IN PHILANTHROPY)



THE FOLLOWING 37 INDIVIDUALS PARTICIPATED IN AN INTERVIEW:

Friends of the SJCC (16)

1. Cristine Cioffi
2. Debra Geer
3. Eileen Handelman
4. Mark and Barrie Handelman
5. Mindy Holland
6. Kati Illouz
7. Andrew Katz
8. Gerry Magnes
9. Eileen Michaels
10. Michelle Ostrelich
11. Allan Pearlman
12. Susan Romanoski
13. Arnold Rotenberg
14. Jeanne Sosnow
15. Sam and Este Sylvetsky
16. Gordon Zuckerman

Members of the Board of Directors (11)

17. Lindsey Boyle
18. Sharon and Rabbi Matt Cutler
19. Jack Gold
20. Bryan Goldberger
21. Amy Landauer-Ruder
22. Jenn Lean
23. Kathy and James Levy
24. Jill Polk
25. Richard Toll
26. Barbara Walton
27. Ruth Yorker

Trustees (4)

28. Andrea Golub
29. Neil Golub
30. Neal Packer
31. Roberta Steiner

Past Presidents (3)

32. Deborah Goldstein
33. Harlan Harrison
34. Eric Kerness

Prospects (1)

35. Dr. Steven Jarret

Rabbis (1)

36. Rabbi Rafi Spitzer & Rachel Besser

Staff Leaders (1)

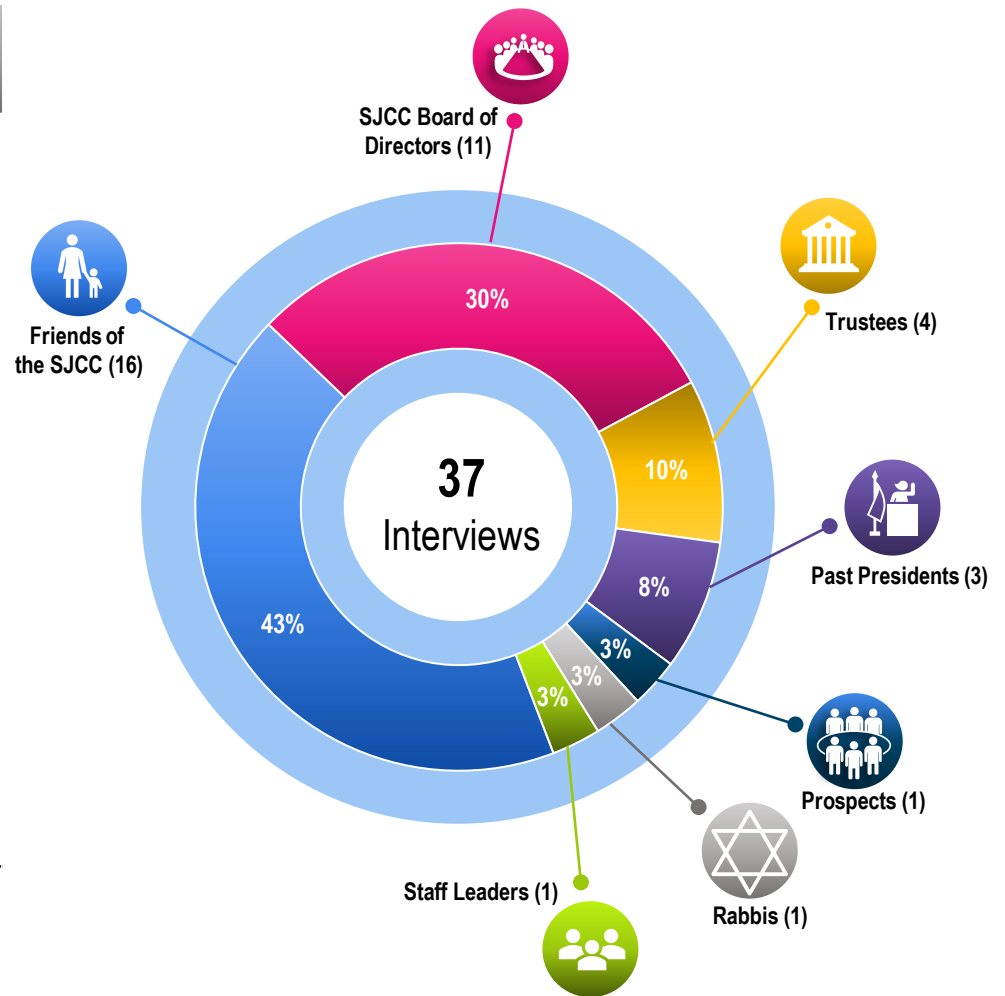
37. Alex Hallenstein



ENGAGEMENT AND PARTICIPATION

Interviewees by Constituency

Friends of the SJCC	16 (43%)
SJCC Board of Directors	11 (30%)
Trustees	4 (10%)
Past Presidents	3 (8%)
Prospects	1 (3%)
Rabbis	1 (3%)
Staff Leaders	1 (3%)
Total	37 (100%)



DETAILED RECOMMENDATIONS



MOVE AHEAD WITH A CAMPAIGN TO ACHIEVE THE SJCC'S VISION

A. Respondents are overwhelmingly in favor of beginning a campaign immediately.

- i. There is a clear need for improved facilities at the SJCC, in addition to a demand for programming that would increase membership.
- ii. The Center should capitalize on reverence and revenue-driving capability of the Early Childhood Programming, which were all brought up by a broad cross section of the interviewees.

B. Key insiders have been alerted to a potential campaign through the campaign feasibility study.

- i. Participating in these strategic discussions has helped cultivate interest and expectation and signaled to key supporters of the SJCC that a request for support could be forthcoming.
- ii. The opportunity to capitalize on this momentum is time sensitive, especially in light of total dollars currently projected to attain from a capital campaign, so the SJCC should follow-up with these individuals in the short to medium term.
- iii. Considering this, the first nine months of the campaign should focus on securing leadership gifts of \$25,000 and above.

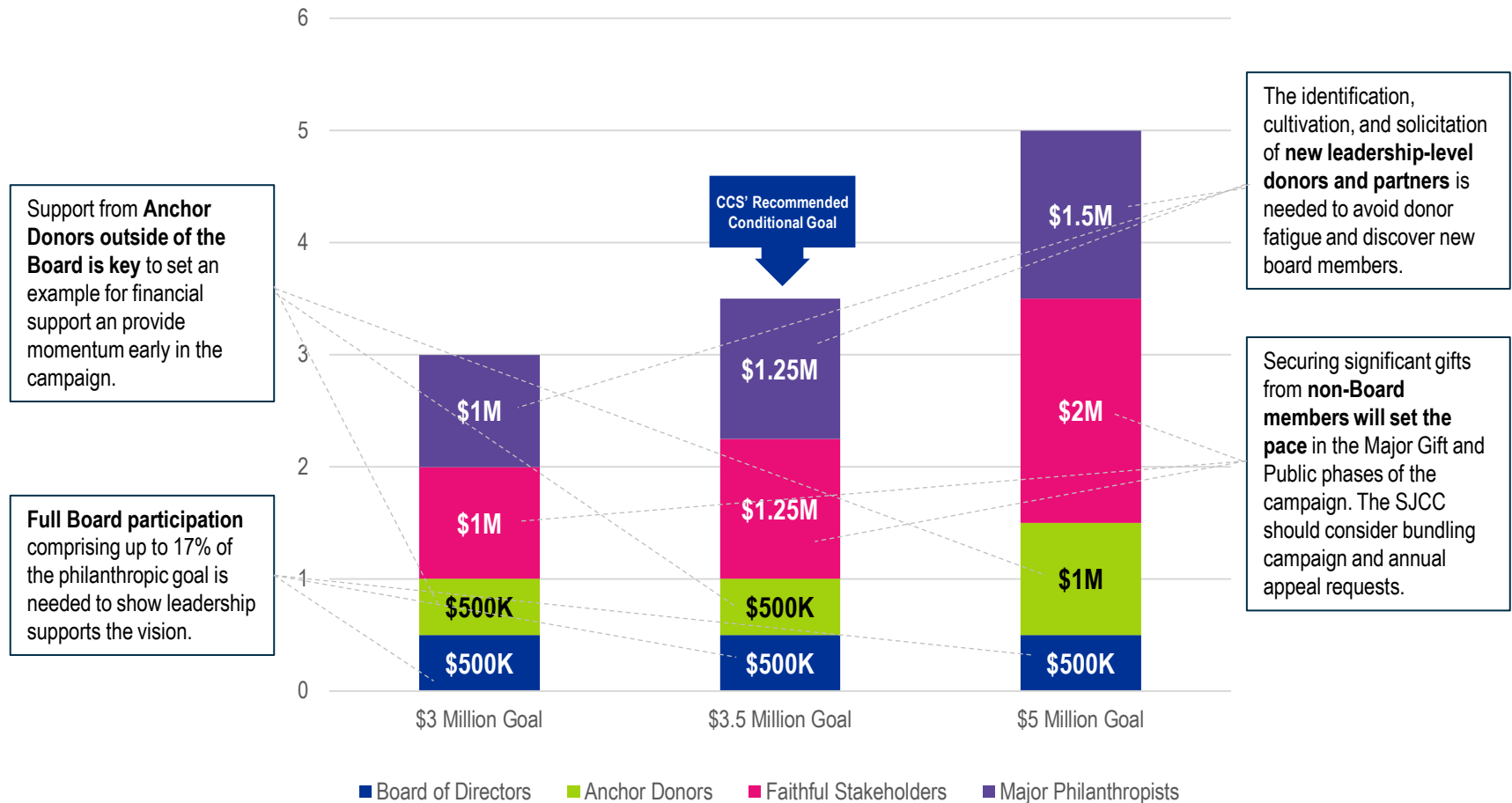
C. There is a general willingness to participate in the campaign.

- i. A number of individuals expressed an interest in being part of a campaign committee or serving as a volunteer leader.
- ii. As we proceed with volunteer recruitment, constituents will confirm their interest, and this will help us to identify additional volunteer needs as the campaign progresses.
- iii. Special efforts should be taken to help volunteers feel comfortable with soliciting gifts to bring the SJCC on par with other benchmarked human service organizations.



CONDITIONAL CAMPAIGN GOAL

The conditional goal is directly impacted by the engagement of four key constituencies:

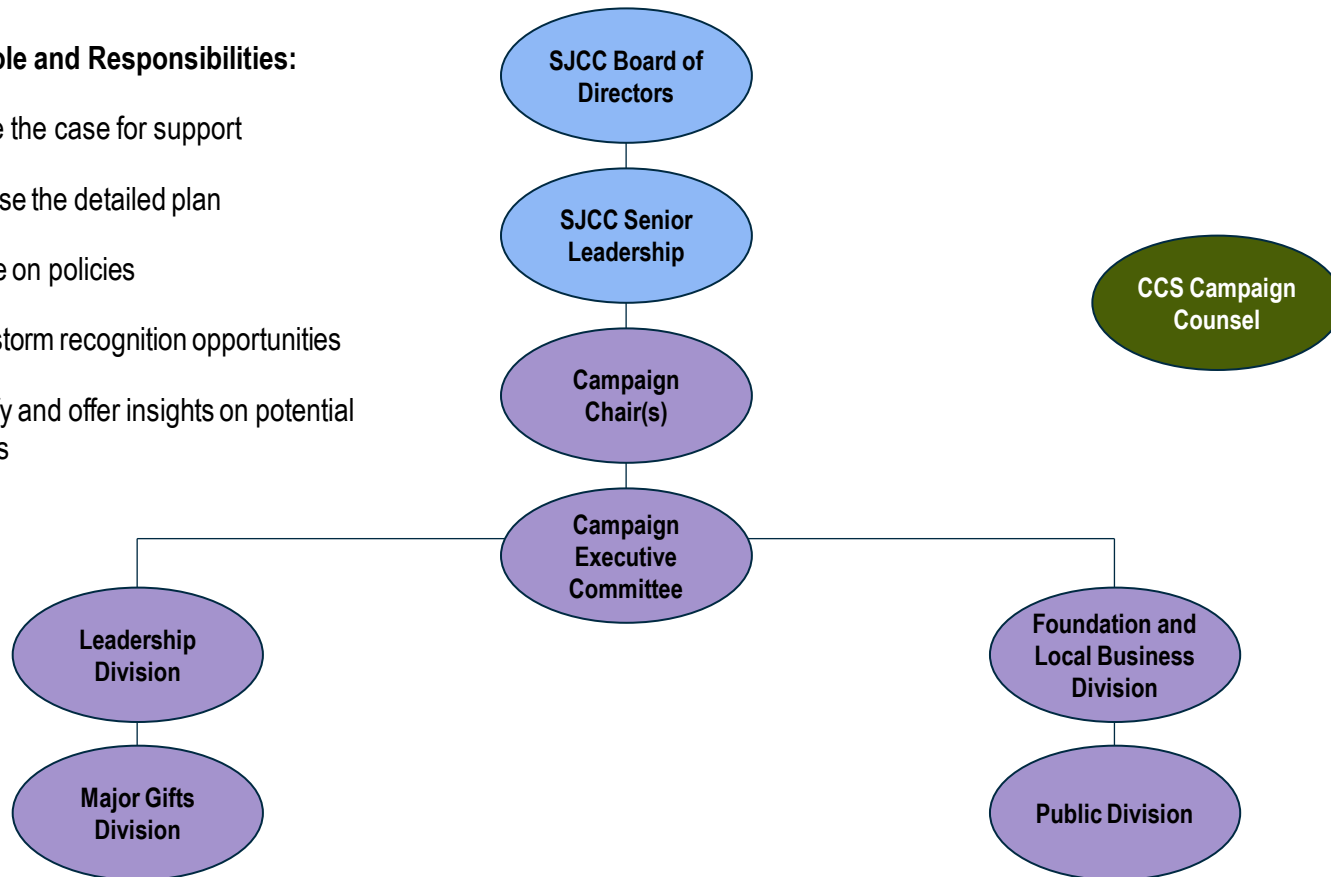


RECRUIT AND CONVENE A CAMPAIGN EXECUTIVE COMMITTEE FROM OCTOBER 2021 TO APRIL 2023

As part of the first phase of the campaign, the Campaign Executive Committee (CEC) should be formed by the expansion of the Study Task Force. Overlap is expected of these two entities, but the bodies should be distinct.

Initial CEC Role and Responsibilities:

- A. Refine the case for support
- B. Endorse the detailed plan
- C. Advise on policies
- D. Brainstorm recognition opportunities
- E. Identify and offer insights on potential donors



REFINE THE CASE FOR SUPPORT

- A. Define the true need of the SJCC:** While the opening of the case sets the vision for the effort, this vision needs to be grounded in more data to clearly represent the wishes and needs of members and families.
- B. Demonstrate who the SJCC currently serves and the potential for the future:** Offer a clearer picture of the diverse make-up of the SJCC membership. Clarify how the campaign will acknowledge the support of those who have been a part of the community for the past decades, while catering to the ever-increasing diverse membership.
- C. Share detail on the SJCC's plans for new programming, renovation, and upgrades to the facilities:** The case should feature mock-ups and diagrams of projects that would be fulfilled through campaign philanthropy. This will provide something tangible for donors to take-in and will promote excitement in the community.
- D. Commit to the investment in accessibility:** To reiterate that the SJCC is a place of inclusivity and open to all, commitment to ADA compliance and demonstration of its importance is critical for messaging.
- E. Establish a culture of extraordinary philanthropy:** Set expectations for philanthropic gifts to be beyond the level of an ordinary annual fund initiative. This can be established by working with members of the CEC, encouraging them to participate in a major gift and having them act as liaisons to the wider community.



ENSURE A PHASE-BY-PHASE APPROACH

Timing	Objectives
Planning Phase Timing: 3 Months August 2021 – October 2021	<ul style="list-style-type: none"> Organize and consolidate existing donor information; prioritize and research top prospects Develop campaign plan, timeline, and budget; develop campaign policies and procedures Refine case for giving and project timelines Prepare initial case documents, solicitation materials, and other campaign collateral Begin cultivation and briefing meetings with select \$100K+ prospects Develop and approve campaign recognition opportunities and gift policies Identify and recruit Campaign Executive Committee, convene ECE starting in October Convene campaign staff check-ins weekly
Board Gifts Phase Timing: 6 months Target: 100% Participation October 2021 – April 2022	<ul style="list-style-type: none"> Begin cultivating and soliciting \$100K+ prospects, based on readiness Solicit all Board members Establish campaign activity benchmarks Continue prospect identification, research, and prioritization Continue weekly staff meetings
Leadership and Major Gifts Phase Timing: 6-9 months Target: \$100K+ prospects, \$25K+ prospects October 2021 – June 2022	<ul style="list-style-type: none"> Convene Campaign Executive Committee monthly Continue cultivation, briefing, and solicitation meetings with \$100K+ prospects Begin cultivation, briefing and solicitation meetings with \$25K+ prospects Identify, solicit, recruit, and train additional leadership and volunteers as needed Continue weekly staff meetings
Community Phase Timing: 9-12 months Target: <25K prospects April 2022 – April 2023	<ul style="list-style-type: none"> Solicit, recruit, and deploy constituency-specific leadership and volunteer committees Continue weekly staff meetings, prospect identification, research, and prioritization Complete all personal solicitations with \$25K+ prospects Develop public communications plan Publicly launch campaign, including announcement of progress and goal Implement general solicitations via mail, phone, print and social media, etc.
Wrap-Up Timing: 5 months April 2023 – August 2023	<ul style="list-style-type: none"> Evaluate outcomes and impact Ensure pledge payments are timely and fulfilled Share impact reports with donors and public Celebrate success; Sustain and grow philanthropic revenue



CREATE A REQUEST PROSPECTUS TO GARNER EARLY LEAD COMMITMENTS AND EDUCATE THE WIDER COMMUNITY

The following is a list of tools that will be used during the silent and public phases of the campaign. While the core messages will likely remain consistent, campaign messaging will evolve over time as the SJCC receives feedback from prospects. The below documents will therefore evolve during the lifetime of the campaign.

	Item	Audience	Purpose/Intent
Case for Support & Derivatives of the Case for Support	Case for Support	Staff and Leadership	<ul style="list-style-type: none"> Provides rationale for initiative and is built off the preliminary study case for support Text focused document that serves as source material and a tool to present the plan and vision
	Viewbook	Donors and Prospects	<ul style="list-style-type: none"> Communicates case in a visually appealing manner Creates enthusiasm, while raising awareness and support
	Customized Proposal	Donors and Prospects	<ul style="list-style-type: none"> Educates prospect about the need Provides a focused message for the request and support Addresses urgent need for donor investment
	Naming Opportunities Brochure	Donors and Prospects	<ul style="list-style-type: none"> Matches donors with giving opportunities based on giving levels and interest Provides a focused opportunity based on what is named, offered, and available
	Stewardship Reports	Leadership and Donors	<ul style="list-style-type: none"> Thanks donors Provides update on progress and achievements against benchmarks
Campaign Collateral Tools	Training Materials	Staff and Leadership	<ul style="list-style-type: none"> Provides foundational understanding of the campaign plan and strategy Prepares staff and volunteers to meet with key prospects and donors Educates volunteers on key messages and talking points
	Gift Agreements & Letters	Donors	<ul style="list-style-type: none"> Thanks donors and formally documents commitment Sets expectations for pledge amount, designation, vehicle, and payments
	FAQs	Staff, Solicitors, Leadership, Donors and Prospects	<ul style="list-style-type: none"> Provides crucial information in an interesting format Anticipates common questions Addresses key questions not contained in viewbooks or proposals



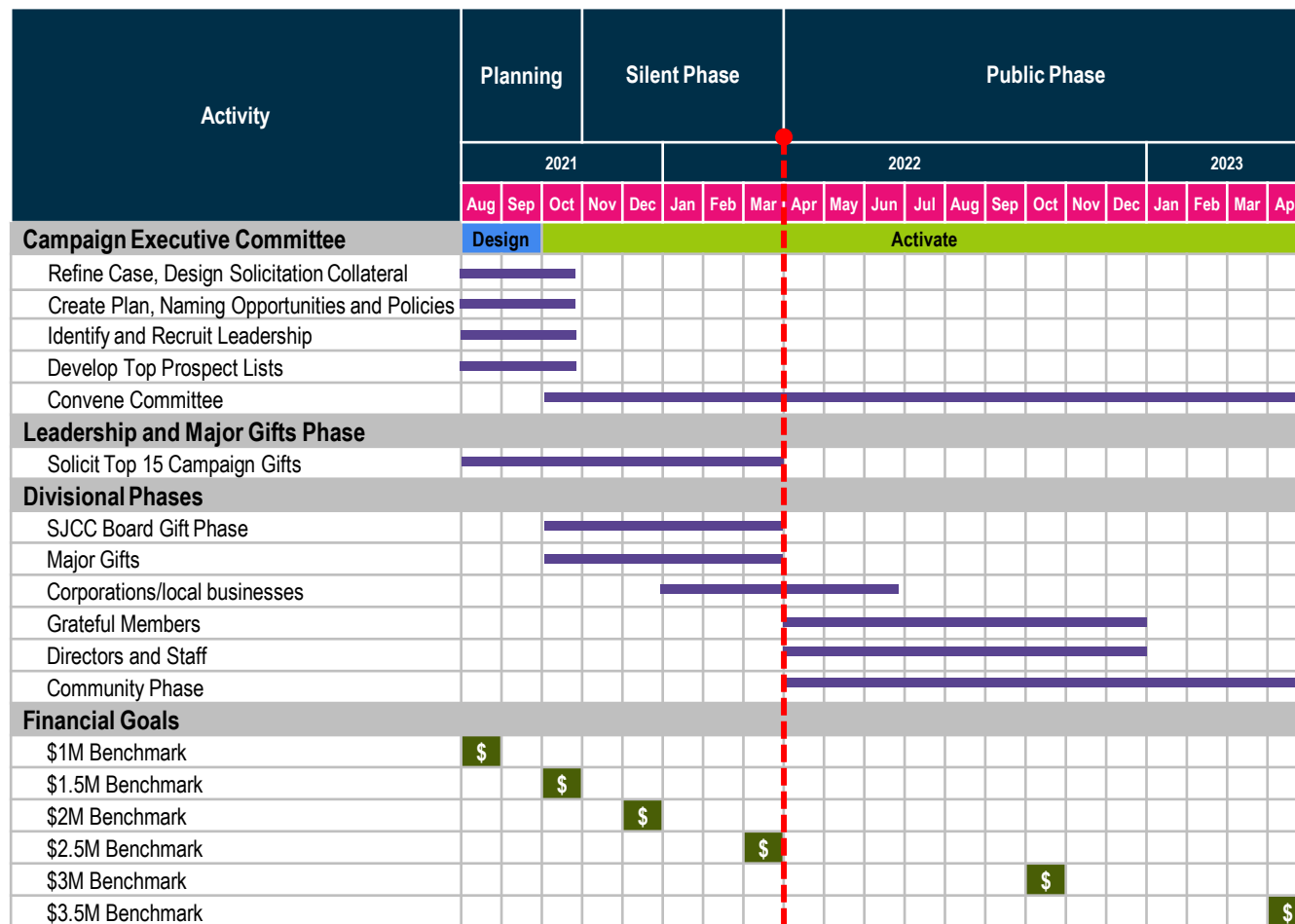
BUILD A DIRECTORIAL STAFF SUBCOMMITTEE TO IDENTIFY GRATEFUL MEMBERS AND FAMILIES

- A. CCS recommends recruiting a **Directorial Staff Subcommittee** to support the Campaign Executive Committee in the **development and implementation of the campaign, communicate the campaign objectives to patients and the wider community, and work with staff and CCS to identify grateful member prospects.**
- B. The subcommittee should be **representative of all departments from the Center**, particularly those directors whose departments are directly impacted by the renewed investment at the SJCC.
- C. Recruitment of the Directorial Staff Subcommittee **should begin only once a Campaign Executive Committee is formed** and there should be crossover between the two groups.
- D. Moving forward, the Committee's responsibilities will include **advising on "grateful members and families" prospects, and actively participating in the "Directorial Staff" Division of the Campaign.**



MAKE THE CAMPAIGN AN ORGANIZATIONAL PRIORITY WITH THE CREATION OF A DETAILED TIMELINE

- A. CCS recommends the **solicitation timeline to commence immediately** following the study.
- B. A brief **planning phase** should be initiated to refine the case, develop solicitation collateral and solicit and recruit key leaders.
- C. There should be an **intensive major gift effort** encompassing participation from the top 15 prospects and participation from the Board and Trustees ending in April 2022.
- D. The campaign should **launch publicly towards the beginning of Q2 2022** assuming a minimum target of an additional \$1.5M can be secured in pledges.



Public Phase



ESTABLISH A CAMPAIGN BUDGET

When deciding to embark on a campaign, early considerations should be given to positioning the institution for success through the provision of adequate resources.

- A. CCS' experience is that human services fundraising efforts with substantial goals can be conducted successfully, and donors can be assured that expenses will be in **the range of 9% to 12% of the funds raised**.
 - i. Community centers that require staffing enhancement will usually run closer to the 12 cents figure due to personnel costs.
- B. The SJCC should **consider establish a campaign budget** through the following three lenses:



INVEST IN RESOURCES AND CAPACITY TO APPROPRIATELY EQUIP THE STAFF TO RUN A SUCCESSFUL CAMPAIGN

CCS recommends the SJCC retains professional fundraising counsel to support the center staff and volunteers through the solicitation phases of the campaign. Duties and responsibilities of this counsel would include:

- A. Directing all recruitment of campaign leadership** and the Campaign Executive Committee
- B. Assuring the important benchmarks are achieved and assisting in evaluating campaign potential** after the initial 15 gifts are received
- C. Providing comprehensive training** for all volunteers
- D. Supplying solicitation briefings and background information** for all Leadership and Major Gift solicitations
- E. Organizing and briefing participants** for all campaign meetings
- F. Coordinating the production of all campaign materials**
- G. Tracking the assignments and progress of solicitations**
- H. Preparing individual solicitation materials**
- I. Managing the progress of the campaign** on a daily basis
- J. Reporting in writing and meeting regularly** with Center leadership regarding campaign progress



WEALTH SCREEN RESULTS



OVERVIEW OF THE WEALTH SCREENING PROCESS

1. The Jewish Community Center of Schenectady provided CCS an export of all constituents within its database.
2. Following the removal of duplicates and deceased, a total of 1,006* constituents remained.
3. All 1,006 constituents were classified as 'individuals.'
4. Of the total constituents, 70% had donated at least \$100 to the JCC. 23% had donated at least \$500.

***It would be advisable to review those records that were considered duplicates to ascertain if some significant donors were omitted.**

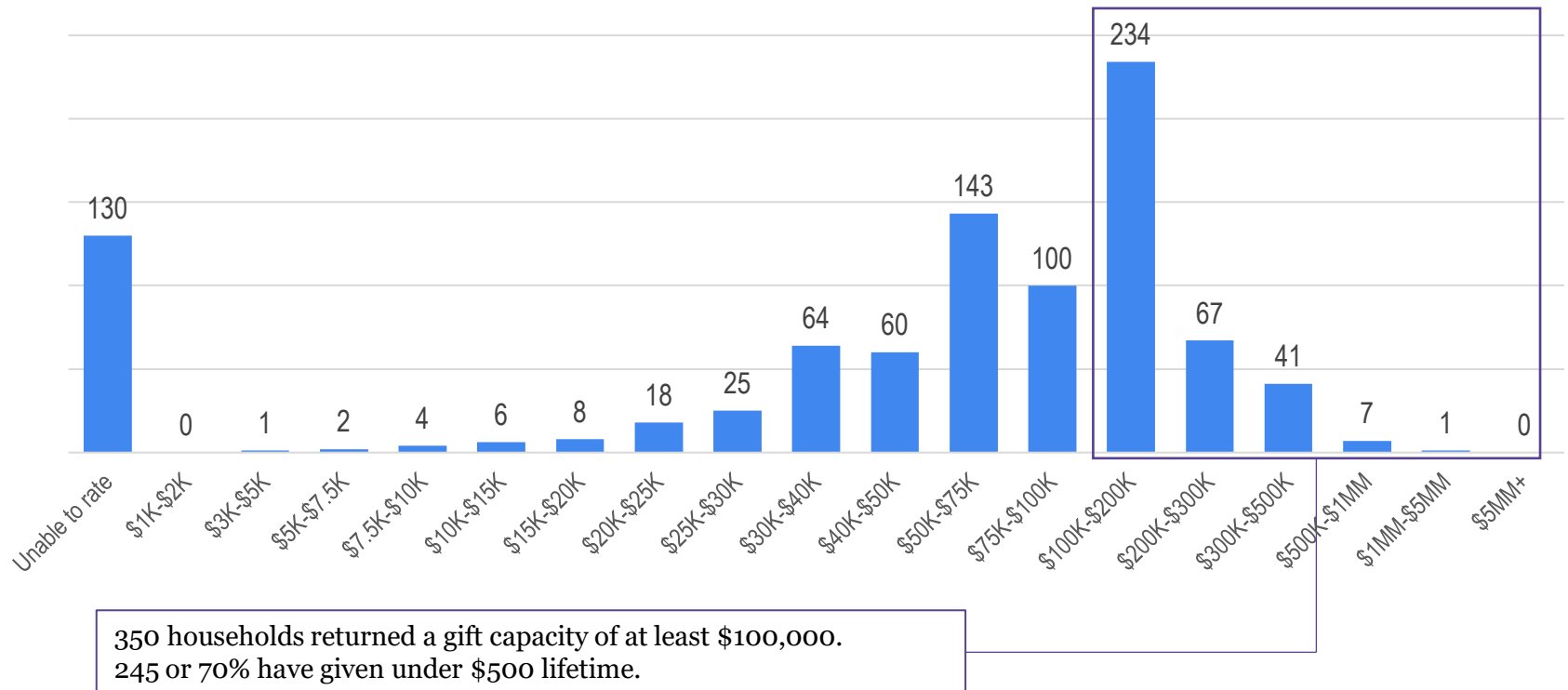


WEALTH SCREENING RESULTS HAVE UNCOVERED SIGNIFICANT POTENTIAL

Wealth screening identified opportunities among constituents with capacity of \$100k+

CCS identified 1,006 constituents eligible for wealth screening (individuals).

Wealth Engine was able to match 911 households with gift capacity data* (91%).

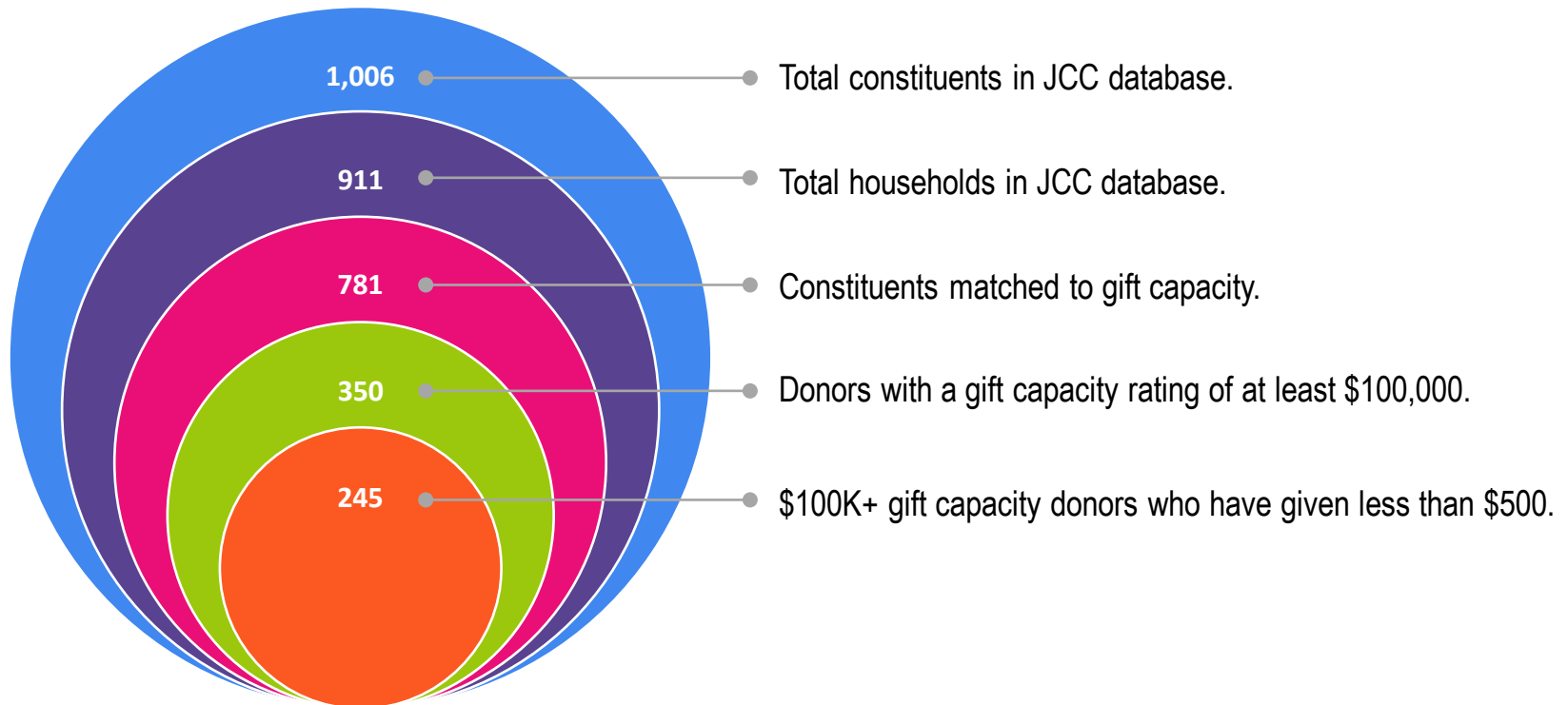


*Gift Capacity Rating = Total philanthropic giving potential over five years to all causes



NARROWING THE FOCUS WITHIN THE PROSPECT POOL

CCS used capacity and affinity markers to narrow the prospect pool of individuals.



NARROWING THE FOCUS WITHIN THE PROSPECT POOL

Constituents with an estimated gift capacity of \$100k+ have donated over \$830 thousand lifetime

Gift Capacity Level	# Households	Total Giving	\$500+ JCC Lifetime Giving
\$5MM+	0	-	-
\$1MM-\$5MM	1	\$50,000	1 (100%)
\$500K-\$1MM	7	\$45,630	1 (14%)
\$300K-\$500K	41	\$293,486	8 (20%)
\$200K-\$300K	67	\$137,604	15 (22%)
\$100K-\$200K	234	\$303,664	80 (34%)
\$75K-\$100K	100	\$203,986	24 (24%)
\$50K-\$75K	143	\$126,897	34 (24%)
\$40K-\$50K	60	\$51,455	10 (17%)
\$30K-\$40K	64	\$28,688	10 (16%)
\$25K-\$30K	25	\$7,365	3 (12%)
\$20K-\$25K	18	\$5,137	2 (11%)
\$15K-\$20K	8	\$629	0 (0%)
\$10K-\$15K	6	\$1,285	1 (17%)
\$7.5K-\$10K	4	\$410	0 (0%)
\$5K-\$7.5K	2	\$850	1 (50%)
\$3K-\$5K	1	\$500	1 (100%)
\$1K-\$2K	0	-	-
Unable to Rate	130	\$313,543	21 (16%)
Grand Total	911	\$1,571,128	212 (23%)

1. 23% of all households have given at least \$500 lifetime.
2. These constituents have a combined giving history of more than \$1.47 M.
3. 14% of constituents that Wealth Engine were unable to rate account for 20% (\$313,543) of all total giving from individuals. This is a positive finding and suggests a reexamination of this data.



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