

Burke County United Way
Major Capital Fund Raising Campaigns
(In excess of \$100,000.)

The Annual United Way allocation to an agency is made to support agency program cost. The United Way does not undertake to raise capital funds for any agency. However, it recognizes that an agency, from time to time, may need to replace or add to existing structures, acquire major capital assets, and/or do major repairs and remodeling. Therefore, after certain steps are taken, the United Way may give approval of an agency to undertake a major community-wide capital campaign to raise \$100,000 or more.

So there will be no undue competition among agencies for capital funds, it is necessary to schedule the drives that will take place in any one year. Ordinarily, an agency seeking to undertake a capital campaign must make its request at least one year in advance to be assigned the time period for its drive.

The policies and procedures for undertaking a major capital campaign are as follows:

1. Tentative scheduling of the year for the drive.

The agency submits a Capital Campaign Drive Request Letter to the United Way. The Executive Committee first reviews the request with the agency. With the Executive Committee's recommendations, it is then forwarded to the Budget and Allocations Executive Committee for the tentative scheduling of the campaign. Ordinarily the time assigned will be no sooner than one year from the date of the agency's request.

2. Final Authorization

With its request for final authorization submitted at least six months before the opening date, the agency will furnish to the United Way:

- A. The result of the studies it has made to determine the need for its proposed campaign and the feasibility of achieving its fund raising goals, including any changes in community needs since the campaign was scheduled that may affect the agency program.
- B. Its projections as to the impact of the new or improved facility on the agency's program(s) and operating budget
- C. A report of its progress in preparing its fund raising case, securing a campaign director and enlisting volunteer leadership.

The agency's request will be scheduled for the United Way Executive Committee and for review and then final action by the full Board of Directors.

3. Agency Consultation and Reporting of Progress

The agency shall consult with the United Way if the authorized plan is to be altered due to:

- a. Failure of the capital campaign to reach its goal.
- b. Inability to initiate/complete the proposed construction on a timely basis.
- c. Unforeseen changes in program or service needs which significantly affect the authorized plan and its service objectives.

The agency shall report to the United Way as to the status of the campaign within 30 days after expiration of the time assigned for the drive. It shall report to the United Way on the total results of its fund raising and capital improvement project within 5 years of the opening date of its campaign.

The active drive should be scheduled so as not to interfere with the United Way's fall campaign drive.

CRITERIA FOR APPROVAL

Burke County United Way uses a number of criteria to determine whether or not a capital fund raising program will be approved:

- a. Is the agency able to demonstrate sufficient community need for the program that will be enhanced by the capital campaign to justify the expenditure of scarce community resources? Has every consideration been given to using or redeploying existing resources?
- b. What will be the long-term operating cost implications of capital fund raising? For example, new facilities must be heated, insured, maintained, etc. What will be the sources of operating cash?
- c. Is appropriate community leadership ready to commit itself to working on the campaign?
- d. Has sufficient planning been done to reasonably assure success? Has reliable market research been done to determine whether or not the program will sell? Failed capital fund raising is demoralizing to all concerned and damages the reputations of United Way, the agency seeking funds and even the community itself.