

How Bricks and Mortar can Deepen Community Connections

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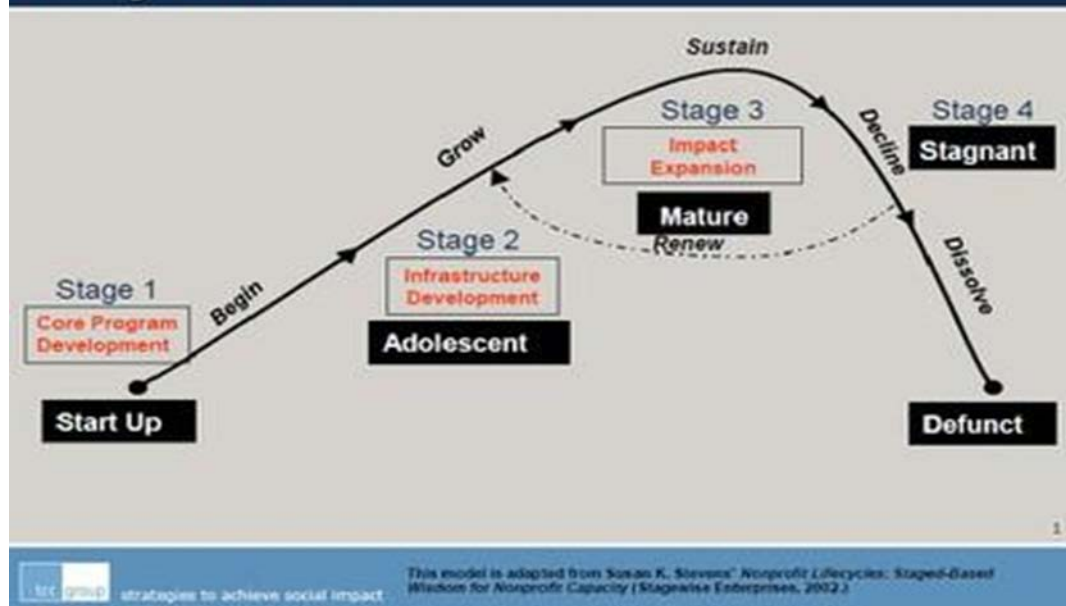
Overview

- Role of facilities, what value they add and basic 4 step process in the for a planning and fundraising for a facility
- Galveston Bay Foundation Case Study
- San Diego River Park Foundation Case Study
- Self Assessment Exercise and discussion



Why Facilities are Crucial for Land Trusts?

The Nonprofit Organizational Lifecycle Model



- Once the last acre has been protected – then what?
- People value things they actively use
- Facilities can help make people who are not comfortable in the outdoors more at ease
- Facilities provide opportunities to earn unrestricted revenue (food service, lodging, outdoor recreation)
- Home for programing for all ages
- Demonstrate solutions to climate change, storm water management, native plants
- Gathering and eating together is one of the oldest and lasting forms of building community

How is fundraising for a facility different?

- Fundraising for facility is more complex and more time consuming than the typical land deal.
- More upfront costs for items like permitting, capital campaign feasibility studies, pro-formas and business plans.
- Early planning is key and lays the foundation for fundraising
- Facilities offers more opportunities for donors asks.
- Different funding sources for facilities – like the Economic Development Agency with the Department of Commerce.

Step One: Getting Started

❑ Understanding Your Community

- What gap or need is not currently being met?
- Is there a natural resource, recreational need or issue in need of interpretation?
- **Tip: Use traffic counters document current use of you lands.**

❑ Understanding Your Organization

- Are staff and board in general agreement?
- New facility vs renovation
- Gut check – do you have sense that this could be funded?
- **Tip: Use the spectrum of success for board/community conversations (next slide)**

❑ Exploring the Idea

- **Tip: Get a college to help – class project explore the idea**
- Visit similar facilities
- Conduct soft market research



Spectrum of Success

Project:

Time Span:

Goals / Success?

Replace this text with high-level goal statement.



Step Two: Planning, Design and Permitting

- ❑ Building Programming (what you want to do)
- ❑ Pro-formas & Business Plans
 - Do you want to have food service?
 - Have a retail store?
 - Consider uses like rentals for wedding
 - What about Insurance for facility – operation
- ❑ Hire a design team to sketch an idea of a facility and estimate the cost of the facility
- ❑ Hire Project Manager oversee the project
- ❑ Consider started permitting process first before fundraising
 - Wetlands permits, traffic studies,
 - Septic system or hook up to city sewer?
- ❑ Quiet Stage of a Capital Campaign
 - Tip: Wise to secure between 30% to 50% of the funding
 - Consider financing and government grants too



Step 3: Capital Campaign

☐ Case Statement

- What is your story – how does this facility make the community better
- 80% of funding needs to be raised before construction
- **Tip:** Host events that show what the future could be!

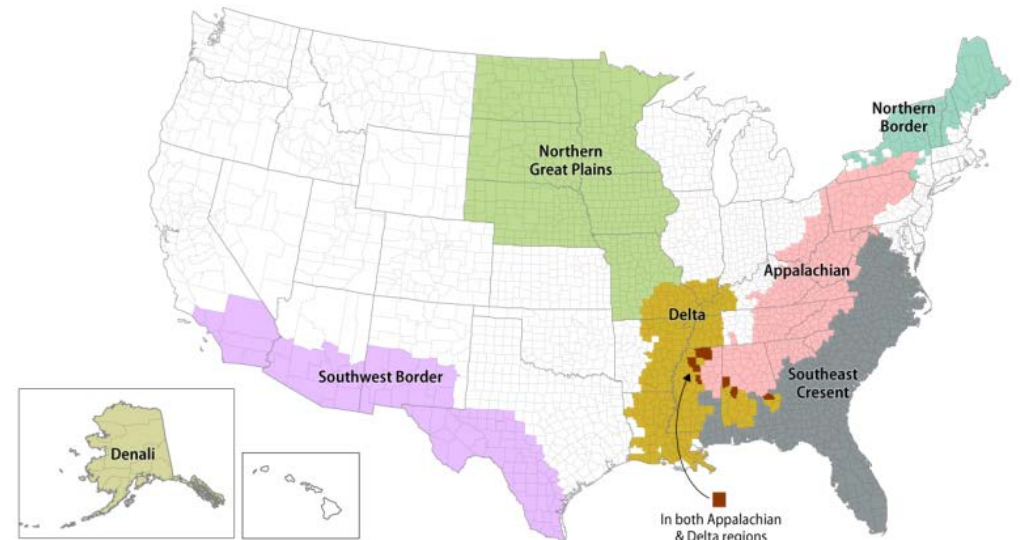
☐ Making the asks

- Board, staff and friends all have a role in asking for support
- Donors need to have been cultivated over years

☐ Consider Federal Sources for Grants and Loans

- Economic Development Agency
 - Awarded \$750 million for recreational facilities and tourism – via American Rescue Act
- United States Department of Agriculture – Rural Economic Development
- **Tip:** Consider 7 Federal Regional Commissions

Federal Regional Commissions and Authorities



Step 4: Construction and Stewardship

Hiring contractors

- Inflation
- Expect the unexpected (have a contingency fund)

Building Commissioning – test your systems.

Celebrate along the way!

Once the facility is built – collect data on who is actually using the facility.

Save for that roof you will need in 30 years.





LegacyWorks Group enables communities to address complex challenges and meet critical needs through highly collaborative initiatives. Each new initiative uncovers new impact opportunities and builds capacity to collaborate on bigger things.

Over time growing project portfolios create pathways to larger scale outcomes. We illustrate this process as a widening spiral, with each initiative a stepping stone on the path to systemic change.

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Self Assessment

- Series of questions to see if you have a solid foundation
- Organization readiness in fundraising, stewardship and your knowledge/relationship to your community
- Self Assessment is pre-step to step one in the planning/implementation process

Facility Planning and Fundraising Assessment

To assess whether your organization is in the best position to take full advantage of an effort to build a facility or undertake a significant renovation of an existing facility complete the following questionnaire:

- | | <u>Yes</u> | <u>No</u> |
|---|------------|-----------|
| 1. Do you record or document who is using your preserves or attend your current programs? | | |
| 2. Have you conducted a community needs survey or mapped community assets to see if there issues/opportunities/gaps that a land trust can fill? | | |
| 3. Does your organization own/run any facilities? | | |
| 4. Do you own land that is well located to service your audience for new facility? | | |
| 5. Would a facility make new or innovative programming possible? | | |
| 6. Do you have a board member with significant construction, contracting, permitting, design or physical planning experience? | | |
| 7. Do you have an effective system for tracking your periodic contacts with major donor/prospects? | | |
| 8. Do you have an active resource development committee? | | |
| 9. Do you board members with fundraising experience or board members who enjoy meeting new people and talking about their hopes and dreams? | | |
| 10. Have you financed a project with a bridge loan or other type of loan? | | |
| 11. Have you completed a significant capital campaign in the past? | | |
| 12. Does each board member provide annual financial support to your organization? | | |
| 13. Do you have hunch that this facility would be of keen interest to a major donor (legacy scale gift)? | | |

If you have responded "No" to three or fewer of these questions, you likely are in good shape and ready to start to explore the value of a facility for your organization.

If you have responded "No" to four or five of these questions, you are doing well but likely need to make some improvements to effectively embark on a facilities project.

If you have responded "No" to 6+ of these questions, you have some work to do on basic infrastructure; let us know how we can help!