

# Fund Development Report

Meeting: February 20, 2020

Attendees: Gordon Beatie, Dan Halloran, Rick Ballantyne Staff: Jim Phelps

## FYE 2019 Fundraising Budget

The Committee discussed Capital Campaign targets through June 30, 2020

### Events

- The Heritage Oaks II Dedication will be in early May
- The Donor Appreciation Event has been set for Thursday, May 28 at the Young's home
- The proposed Playhouse Build will be in Fall, 2020
- Past Board Member celebration will be in December, 2020

## 2020 Capital Campaign

The Committee reviewed a number of planning points for the Capital Campaign:

- Our target is \$250,000
- Individual fundraising plans for Board Members will be finalized and presented at the February Board meeting
- Gordon will lead the presentation of the Capital Campaign highlights at the February Board meeting
- Each Board Member will be asked to make contact with a prospective donor by March 15, with the intention of setting an appointment that will be attended by Lorraine/Jim
- Capital Campaign collaterals are complete; the campaign web page will be live on March 1
- It was suggested that any donor making a pledge exceeding \$X,XXX be given a brick that will be placed in their honor (or a designee's honor) at Heritage Oaks I community space
- Additionally, donors making gifts exceeding \$XX,XXX will also be given a Shutterfly book that commemorates Heritage Oaks ("How We Built a Neighborhood")
- Media: An article previewing Heritage Oaks II appeared in The Union; it was picked up on the Habitat International news feed, and even caught the attention of BBC News
- Media: Jim will be on KNCO on March 24 at lunchtime to discuss the completion of Heritage Oaks I and the beginning of Park Place and Heritage Oaks II
- Rick will be shepherding the Board portion of the campaign
- To-date we have garnered \$6,500 from pledges/donations/ReStore Round-Up
- A set of prospects have been designated for

## 2020 Community Outreach

- The January Newsletter was the most opened newsletter we've sent to-date
- February newsletter will feature a story on Homeowner Support

## Faith Communities

Our Faith Leader luncheon is set for Wednesday, March 4. Thus far 14 churches have RSVP'd. We expect at least 20 to be represented. The Union will have a reporter present to cover the event.

## Grant Activity Update:

Currently applications: UAIC, bank of America in process.