

# Catawba County Campaign Review Committee

## Campaign Application Process 2011

### 1. 2011 Instructions

The Catawba County Capital Campaign Review Committee (CRC) formed in 2008 as a collaborative effort of the local philanthropic community. The CRC process is voluntary; its goal is to support the efforts of our non-profit organizations by reviewing, endorsing, and scheduling major capital fundraising campaigns.

The Catawba Valley Community Foundation, in partnership with the Catawba Chamber, United Way and United Arts, will staff and coordinate the CRC; however policies and endorsement decisions will be made by the CRC.

The primary goal is to support the efforts of Catawba County non-profit organizations by reviewing, endorsing and scheduling major capital fundraising campaigns. These are defined as capital, endowment, or debt reduction campaigns during a specific time period, with a goal of raising \$500,000 or more.

All campaigns should significantly strengthen the organization's capacity to serve its constituency and/or respond to clearly defined needs in Catawba County. Due to limited community resources, organizations are asked to thoroughly consider the community needs being addressed, alternatives to address the need, and all possible funding sources prior to submitting a request.

**Please review the eligibility, requirements and timeline as outlined below. The application is available online at [www.nccommunityfoundation.org](http://www.nccommunityfoundation.org). Please follow the link to Affiliates, Catawba Valley. The application, a writeable PDF, is found on the Catawba Valley affiliate page. Should you have questions, please contact Leslie Stewart at the Catawba Valley Community Foundation, at 828 328-1237 or [lstewart@nccommunityfoundation.org](mailto:lstewart@nccommunityfoundation.org).**

#### **ELIGIBILITY TO APPLY**

Qualifying capital campaigns coming before the committee can include the following:

- Purchase of real estate for the purpose of building or renovating new facilities
- Construction or renovation of facilities on real estate already owned by the organization
- Renovation or additions to existing property
- Any fundraising efforts, including those seeking Endowment Funds, that fit the definition of a major campaign as described.

Those organizations not generally eligible for review include hospitals, universities or colleges/higher education centers, churches, synagogues, mosques and/or affiliated organizations, education institutions/government entities.

REQUIREMENTS to be included in your application submission packet:

- 501c3 Status Letter
- Application Narrative, not to exceed three (3) pages
- Completed Capital Campaign Budget
- Strategic Long Range Plan & Mission Statement

- Current Board of Directors list
- Completed IRS Form 990 and most recent external audit report
- Current year operating budget

Please include all materials in one original set. The 15 remaining sets do not include the Audit, 990 or 501c3 letter. Please do not include any additional materials. Do not bind the materials together.

The CRC currently schedules campaign reviews in June and November. Applications must be received by **5:00 p.m. June 1, 2011; or November 1, 2011. Future dates will be determined.**

You are required to submit 16 copies of the completed application. The completed application must be signed by the Executive Director, Chair of the Board of Directors and Capital Campaign Chair to qualify for review. Applicants should be prepared to appear before the CRC. Calendared projects will be publicized.

Thank you,

Steve Neuville  
Chair, Catawba County  
Capital Campaign Review Committee

**2011 CRC Committee Members**

George Moretz, Tony Wolfe, Harley F. Shuford, Steve Mull, Everett McNair, Jerome Bolick, John Teeter, Doug Howard, Don Coleman, Tony Rose, Steve Neuville

**CRC Community Partner Members**

Danny Hearn, Catawba County Chamber of Commerce; Jennie Connor, United Way of Catawba County; Kathy Greathouse, United Arts Council of Catawba County; Charles Snipes, Catawba Valley Community Foundation.

**Sponsoring Organization**

Catawba Valley Community Foundation, an affiliate of the North Carolina Community Foundation. Contact Leslie Stewart with questions: 828 328 1237 or [lstewart@nccommunityfoundation.org](mailto:lstewart@nccommunityfoundation.org).

## 2. 2011 Application

### Applicant Organization Information

Organization Name: \_\_\_\_\_ EIN: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Physical Address: \_\_\_\_\_

Executive Director: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Website: \_\_\_\_\_

Goal: \_\_\_\_\_

Campaign Committee Chair: \_\_\_\_\_

### Time Frame for campaign

Start Date: \_\_\_\_\_

End Date: \_\_\_\_\_

I/we fully understand that to qualify for CRC review and scheduling we must submit a completed Application with all required documents by the stated deadline. The CRC will notify you in writing of the date that you are invited to appear before the CRC.

We understand that failure to respond to any of the above items may adversely affect the consideration of this application. We acknowledge that the information contained in this application including attachments and supporting materials, is true and correct to the best of our knowledge.

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Executive Director	Name	Date
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Chair of Board of Directors	Name	Date
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Chair of Capital Campaign	Name	Date
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### 3. 2011 Narrative Project Description

**Please answer the following questions in a document not to exceed 3 pages. State the question, followed by your response.**

1. Briefly describe your capital campaign and fundraising goal.
2. Briefly summarize your board-approved long range goals.
3. Have you conducted a feasibility study, and/or engaged professional fundraising counsel? Who? Who is your local campaign chair?
4. How will you justify your campaign need/goal to the community?
5. Why does your board believe you can raise your proposed goal?
6. What period of time will you allow pledges to be paid?
7. Does your organization have agency funds or reserves to seed the campaign?
8. Will this plan raise or decrease your annual operating costs? What is your plan to raise the required additional operating expense added by this campaign?
9. Will you be requesting campaign gifts from any Catawba County, city, state, or federal government entity? If so, how much of the total goal?
10. If you are a Catawba County United Way or United Arts Council of Catawba County member, has your campaign been endorsed or approved by same? Blackout periods will be taken into consideration for scheduling.
11. Have you conducted a capital campaign during the past 10 years?  
Dates: \_\_\_\_\_ Goal: \_\_\_\_\_  
Amount Raised: \_\_\_\_\_
12. If your plans include the construction or renovation of a building, please describe the location and proposed facility. Will you continue to use the current facility?
13. Will new programs be added?
14. What alternatives have you explored other than building a new facility/structure?
15. What plans have been made in the event that the campaign falls short? What use will be made of funds, if the campaign exceeds its goal?

Thank you for your participation in this community review process. The endorsement of the CRC does not guarantee the success of the campaign. However, it can be an important factor when asking for contributions as it will demonstrate readiness, planning and management capability.