

CAPITAL CAMPAIGN REVIEW BOARD QUESTIONNAIRE
2014-2018 Schedule

This questionnaire is designed to provide the Capital Campaign Review Board with information needed to schedule capital campaigns by nonprofit organizations serving residents of Cumberland, Dauphin, and Perry counties. Capital campaigns are defined as fund raising campaigns for capital needs, including facilities, endowment, and other non-operating expenditures, operating expenses are excluded.

To ensure that the Capital Campaign Review Board has an adequate understanding of your campaign plans, please complete and **return this questionnaire no later than Friday August 16, 2013.** Should we have any questions about the information you have submitted, we will be back in touch with you before the questionnaires are submitted to the Review Board. The Review Board will send notification of your organization's status by the end of December, 2013.

Capital Campaign Review Board
c/o The Foundation for Enhancing Communities
P.O. Box 678
Harrisburg, PA 17108-0678

Organization Name: _____

Address: _____

Contact Person: _____

Phone: _____ E-mail: _____

Name of Person Completing This Form: _____

Title: _____ Signature: _____

Date: _____

Briefly state your organization's vision and mission/ purpose:

List your organization's major programs:

PLEASE NOTE THE FOLLOWING:

IF YOU ARE INCLUDING AN ENDOWMENT COMPONENT OVER \$250,000 IN YOUR CAMPAIGN (FULLY OR PARTIALLY) YOU MUST CHECK BOX 6. IF YOUR CAMPAIGN IS PARTIALLY AN ENDOWMENT CAMPAIGN, PLEASE ALSO CHECK THE OTHER CORRESPONDING BOX APPROPRIATE TO YOUR CAMPAIGN.

No Campaigns Underway or Expected:

1. If your organization is not currently engaged in a capital campaign and does not plan to conduct a campaign in the next five years, check this box and return this form. **There is no need for you to complete the questionnaire further.**

Campaigns of less than \$250,000:

2. If your organization is planning a capital campaign with a goal of **\$250,000 or less**, check this box and return this form. **There is no need to complete the questionnaire further, as campaigns of \$250,000 or less are not reviewed by the Capital Campaign Review Board.**

Campaigns of \$250,000 or more:

3. If your organization previously received notification from the Capital Campaign Review Board that your campaign was included in a Capital Campaign Schedule **and** you are currently engaged in the solicitation or payment phase of that capital campaign, check this box and **complete Section I only.**
4. If your organization previously received notification from the Capital Campaign Review Board that this campaign was included in a Capital Campaign Schedule for a solicitation phase beginning in 2014 or later, check this box and **complete Section II only.**
5. If this is a new request from your organization for inclusion in the Capital Campaign Schedule for a solicitation phase to begin in the period 2014-2018, check this box and **complete Section III only.**

ENDOWMENT Campaigns of \$250,000 or more: (either fully an endowment campaign or a campaign consisting of both endowment and other capital needs)

6. If your organization is planning a capital campaign to raise over **\$250,000 that includes any endowment funds**, check this box and please fill out section IV. The **Capital Campaign Review Board** will review your submission and include your information in their discussion about the campaigns being conducted in the tri-county area. However, your information will not be included in the schedule mailed to corporations and foundations, unless there is a non-endowment component over **\$250,000.**

SECTION I – CAMPAIGNS IN SOLICITATION OR PAYMENT PHASES

- A. Did your organization previously receive notification from the Capital Campaign Review Board that this campaign was included on a Capital Campaign Schedule? _____Yes _____No
- B. Are you currently engaged in a solicitation or payment phase of that campaign? _____Yes _____No
- C. What is the purpose of the campaign
- D. What is your total campaign goal from ALL sources? \$_____
- E. How much do you expect to raise from the Tri-County region from all sources? \$_____
- F. How much do you expect to raise from the following funding sources in the Tri-County region (Cumberland, Dauphin, and Perry Counties)?

- i. Individuals \$_____
- ii. Corporations \$_____
- iii. Foundations \$_____
- iv. Other, (list below)
including government \$_____
- Total:** \$_____

Please list Other Source(s)_____

- G. As your campaign is already underway, how much has been received and pledged from the following funding sources in the Tri-County region (Cumberland, Dauphin, and Perry Counties)?

	Received	Pledged
i. Individuals	\$_____	\$_____
ii. Corporations	\$_____	\$_____
iii. Foundations	\$_____	\$_____
iv. Other (list below) including government	\$_____	\$_____

Subtotals: a. \$_____ b. \$_____

Please list Other Source(s)_____

Total received and pledged to date in Tri-County region
 (sum of a & b above) \$ _____

H. Please indicate the expected payment schedule from unpaid pledges and additional Tri-County region fundraising in each of the following years in each category:

Expected payments

2014 total \$ _____
 Individuals \$ _____
 Corporations \$ _____
 Foundations \$ _____
 Other (list below) \$ _____
 including government

2015 total \$ _____
 Individuals \$ _____
 Corporations \$ _____
 Foundations \$ _____
 Other (list below) \$ _____
 including government

2016 total \$ _____
 Individuals \$ _____
 Corporations \$ _____
 Foundations \$ _____
 Other (list below) \$ _____
 including government

2017 total \$ _____
 Individuals \$ _____
 Corporations \$ _____
 Foundations \$ _____
 Other (list below) \$ _____
 including government

2018 total \$ _____
 Individuals \$ _____
 Corporations \$ _____
 Foundations \$ _____
 Other (list below) \$ _____
 including government

SECTION II – CAMPAIGNS PREVIOUSLY INCLUDED IN A CAMPAIGN SCHEDULE FOR SOLICITATIONS BEGINNING IN 2014 OR LATER

A. Did you previously receive notification from the Capital Campaign Review Board that this campaign was included in a Capital Campaign Schedule? _____Yes _____No

B. What is the purpose of the campaign?

C. What is your total campaign goal (including government sources)? \$ _____

D. How much do you expect to raise from the Tri-County region? \$ _____

E. Please indicate the expected payment schedule from funding sources in the Tri-County region (Cumberland, Dauphin, and Perry Counties) in each of the following years:

i. Individuals

2014	\$ _____
2015	\$ _____
2016	\$ _____
2017	\$ _____
2018	\$ _____
Subtotal: \$ _____	

ii. Corporations

2014	\$ _____
2015	\$ _____
2016	\$ _____
2017	\$ _____
2018	\$ _____
Subtotal: \$ _____	

iii. Foundations

2014	\$ _____
2015	\$ _____
2016	\$ _____
2017	\$ _____
2018	\$ _____
Subtotal: \$ _____	

iv. Other (list below) including government

2014	\$ _____
2015	\$ _____
2016	\$ _____
2017	\$ _____
2018	\$ _____
Subtotal: \$ _____	

Total: \$ _____

Please list Other Source(s) _____

SECTION III – CAMPAIGNS REQUESTING INCLUSION IN CAMPAIGN SCHEDULE

A. Are you requesting inclusion in a Capital Campaign Schedule for a new capital campaign with solicitations beginning in 2014, 2015, 2016, 2017, or 2018? _____ Yes (circle intended year to begin) _____ No

B. What was the period of your most recently completed capital campaign?

from _____ to _____
 Month/Year Month/Year

i. What was the purpose of that campaign?

ii. What was that campaign goal? \$ _____

iii.. How much was actually raised? \$ _____

C. Describe briefly each project that will be funded by the new campaign and state the amount allocated to each project.

Project Description	Total Allocated (\$)	Tri-County Portion (\$)
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D. Has your new campaign been approved by your Board of Directors? _____ Yes _____ No

If so, when? _____

E. Have you conducted a feasibility study? _____ Yes _____ No _____ In Progress

If "Yes," when was the study completed? _____

If "No," do you intend to conduct a study? _____ Yes _____ No

If "In Progress," when do you anticipate completion of the study? _____

F. What is the total campaign goal (including government sources)? \$ _____

G. How much do you expect to raise from the Tri-County area? \$ _____

H. Please indicate the expected payment schedule from funding sources in the Tri-County region (Cumberland, Dauphin, and Perry Counties) in each of the following years:

i. Individuals	2014 \$ _____	
	2015 \$ _____	
	2016 \$ _____	
	2017 \$ _____	
	2018 \$ _____	Subtotal: \$ _____
ii. Corporations	2014 \$ _____	
	2015 \$ _____	
	2016 \$ _____	
	2017 \$ _____	
	2018 \$ _____	Subtotal: \$ _____
iii. Foundations	2014 \$ _____	
	2015 \$ _____	
	2016 \$ _____	
	2017 \$ _____	
	2018 \$ _____	Subtotal: \$ _____
iv. Other (list below) including government	2014 \$ _____	
	2015 \$ _____	
	2016 \$ _____	
	2017 \$ _____	
	2018 \$ _____	Subtotal: \$ _____
		Total: \$ _____

Please list Other Source(s) _____

SECTION IV – ENDOWMENT CAMPAIGNS

A. Did you previously receive notification from the Capital Campaign Review Board that this campaign was included in a Capital Campaign Schedule? _____ Yes _____ No

B. Has your new campaign been approved by your Board of Directors? _____ Yes _____ No

If so, when? _____

C. What is your total campaign goal (including government sources)? \$ _____

- Current "Certificate of Registration under Solicitation Law" from the Commonwealth of Pennsylvania.

Thank you for providing this information. The Capital Campaign Review Board will send notification of your organization's status by the end of December 2013.

2013-2014 Capital Campaign Review Board

William Lehr, Jr., Capital Blue Cross

Chairman

Marion C. Alexander, Community Volunteer

William H. Alexander, Alexander Enterprises

Janice R. Black, The Foundation for Enhancing
Communities

Timothy Fatzinger, President & CEO, United Way of
the Capital Region

Ronald Drnevich, Gannett Fleming (Retired)

Larry Hartman, The Stabler Foundation

Jim Hoehn, CFA, Regional President Central PA,
PNC Bank

David Kleppinger, McNees Wallace & Nurick LLC

Michael Murchie, M & T Bank

Douglas Neidich, Green Works Development LLC

Karen Snider, Susquehanna Consulting and Financial
Group

Morton Spector, Design House

William Stout, Gannett Fleming, Inc.

Chairman Emeritus

Miles J. Gibbons, Jr.

Questionnaire revised 6/24/13