Private Funding of SLSD Facilities

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STEVE HIGGINS, CARTER

Agenda

- Introduction and Summary – Harry

- Case for Philanthropy – Steve

- Path Forward & Potential Projects – Harry

- Q&A – Harry and Steve

Private Funding

- Southern Lehigh is a great school district
- Great districts require ongoing investment
- Funding for numerous capital projects is not available from the general budget
- A private funding program is needed

Sustainable Philanthropy

- Past
  - Short term
  - Focused on a particular athletic project
- Future
  - Long term and sustainable philanthropic program
  - For arts, academics and athletics

Agenda

- Who is Carter?
- Philanthropic landscape
- Benefits of philanthropy at a public school/district
- Our observations from working with public schools/districts
- Additional opportunities provided by philanthropy
- Planning study process

Who is Carter?

- Founded in 2011 by former teachers, Bob Carter and Steve Higgins
- Provide counsel in the areas of:
    - Fundraising
    - Organizational planning
    - Governance
- Education is largest market segment served
- 25 team members living throughout the U.S. and Mexico

Philanthropic Landscape

- $358 billion market in the U.S.
- $55 billion raised annually for educational institutions
- 70% of independent schools are currently in a major campaign, or they are preparing for one
- Many school districts are entering the philanthropic space to advance the overall educational experience of their students

CARTER

Benefits of Philanthropy

- Allows district to enhance their level of excellence
- Less reliant on tax dollars
- Shows innovative, forward thinking leadership
- Demonstrates district's seriousness about student experiences and outcomes

Benefits of Philanthropy

- Provides community and alumni the opportunity to invest in an organization they care deeply about
- Allows people the opportunity to be seen as philanthropists
- Brings the community together

Our Observations

- Capital campaigns and annual giving programs are thriving at districts that have immersed themselves in philanthropy

- Early skepticism evaporates after a few key stakeholders begin supporting the districts

- Superintendents and school boards become viewed as visionaries

- Alumni love being re-engaged with their alma mater

Our Observations

- Three components of education benefit, ensuring that the "whole" child is positioned for future success:
  1. Academics
  2. Athletics
  3. Arts

Additional Opportunities

- Give people an opportunity to give back to an organization that has made them successful

- Allow people to invest in your children, and the thousands yet to be born

- You are responsible for providing the best learning experience for each student

Additional Opportunities

- Your future needs will only increase
- Philanthropy is exciting and enjoyable
- You will be successful if you develop the "right" plan and approach to your efforts

Planning Study Process

- Develop a Case Summary to be tested
- Identify appropriate interview sample
- Conduct 25 to 30 personal interviews
- Assess fundraising infrastructure
- Develop a campaign plan based on the results of the interviews and our own analysis

We will Assess

- Perceptions of the Case Summary
- Internal readiness
- Leadership
- Prospect pool
- Timeline
- Budget needed for the campaign effort

Path Forward

- Kick off a Planning Study
    - ~4 months
    - ~$35,000
- Present results of the Planning Study to the School Board
- Form a Campaign Cabinet
- Execute the initial Campaign
- Select the projects
- Invest in our district!

Potential Projects

- Artificial turf field
- High school auditorium
- Field house
- Multipurpose theater
- Increased weight/fitness room
- Outdoor restrooms
- Home bleachers
- Batting shed replacement
- Baseball field
- Pool

Keys to Success

▶ Active and enthusiastic support

  ▶ From the Administration

  ▶ From the Community

Q & A

Thank You!