

# Proposal for Campaign Study

June 21, 2024

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*TWB is a member of the Giving Institute, a select group of consulting firms that share a commitment to excellence and embrace the highest ethical standards.*

## I. Introduction

On behalf of TWB Fundraising (TWB), we are delighted to submit this proposal to the City of Whitewater to provide fundraising counsel on a Campaign Planning Study focused on best-practice internal readiness assessment and pre-campaign preparation as well as guidance on implementing and managing a successful campaign for the Whitewater Aquatic and Fitness Center (WAFC).

TWB has extensive experience and a proven record of success in assessing an organization's readiness to undertake a fundraising campaign, testing proposed campaign goals, and designing strategies and tactics to help reach those goals. Our proposed consulting team for this initiative, Grace Cichomska, Senior Counsel and Amy Funk, Senior Vice President, are particularly well suited for this engagement. Both have notable years of experience in the planning and execution of successful campaigns, senior development leadership, major gift fundraising, strategic and operational planning, as well as working with and staffing volunteers. Both possess a keen understanding of donors -- their needs and expectations.

The City of Whitewater is eager to move forward with a capital campaign to support three funding priorities: 1) upgrades and repairs to the WAFC, 2) a maintenance and program endowment, and 3) a scholarship fund to allow all families in Whitewater to benefit from the facilities for both health and recreation. We understand that the Whitewater community is passionate about the WAFC, which was built in 2001, and that the WAFC has active partnerships with both the area schools and the city of Whitewater. In addition to memberships, the WAFC receives some financial support from the "Friends of the WAFC". The city is looking to raise an estimated \$2M in private support through this campaign.

To support the capital campaign for the WAFC, we propose that our engagement be comprised of the following major activities:

- A. **Conduct an internal readiness assessment.** The assessment will investigate all aspects of organizational readiness to launch a successful campaign, including staffing, infrastructure, leadership, and the overall climate for success.
- B. **Evaluate your potential prospect pool through a philanthropic screening.** Reviewing your screening results in partnership with the Center's leadership will help us identify your top prospects, select participants for feasibility interviews, and craft specific strategies and potential asks for key prospects.
- C. **Conduct a feasibility study.** Reviewing the screening results and in collaboration with identified leadership for this initiative, TWB will guide the development of a campaign prospectus and develop a gift table to be shared in interviews with prospective donors. We would aim to conduct 15-20 feasibility interviews with identified top prospects. These conversations will provide critical feedback regarding the financial goal, strategy, structure, timing, and plan for the campaign.
- D. **Develop a campaign blueprint.** This big-picture road map, modifiable as the campaign evolves, will include the recommended financial goal and the range of gifts required at each level, as well as recommendations concerning campaign timing, volunteer structure and activities, preliminary campaign budget, the final case for support, and broad solicitation and communication strategies.

## II. Engagement Description

### A. Internal Readiness Assessment

TWB will begin by conducting an internal review and assessment in order to understand the readiness of the City of Whitewater and the WAFC to undertake a campaign. A review of documents and interviews with key stakeholders, including city, WAFC, school district leaders, Friends of the WAFC and community leaders will help us better understand the role and unique culture of the WAFC community.

We will assess who can speak for the vision, describe the plans for the Center's renovation, and help explain what a generous gift of support can make possible. Likewise, we will identify and assess various constituencies and prospects that can be developed as you continue your readiness to implement a campaign. We recognize that dedicated fundraising resources such as staff, a database and related systems and processes do not yet exist. We will ascertain which existing resources can be utilized to support a campaign and identify those resources we recommend you implement prior to initiation of your campaign.

Areas to be covered in the assessment include the following:

#### **Review of Planning Documents**

We will review planning documents including estimates for repairs and improvements, space needs assessments, conceptual architectural designs, community input processes, and presentations to and agreements with the city council and the school district.

#### **Volunteer and Community Engagement**

We will review how the Friends of the WAFC are engaged in fundraising; how the city has sought input from community members on the proposed project; and the community's philanthropic support of other significant facilities such as the Irvin L. Young Memorial WAFC and the Cravath Lakefront Community Center.

#### **Staffing**

We will evaluate the city and the WAFC's staffing structure and the roles, duties, and experience of key staff to understand how they can contribute to campaign success. Most importantly, we will identify the staffing gaps that must be filled prior to campaign planning and implementation.

#### **Fundraising History**

With the understanding that the WAFC does not have a development director or a formal program to raise funds for annual operating support, we will look at historical fundraising efforts including the building campaign for the current WAFC and any special fundraising initiatives.

#### **Systems and Operations**

We understand you do not have traditional fundraising infrastructure such as a database, gift processing protocols, gift acknowledgement and acceptance policies/procedures that would support

campaign planning, donor engagement strategies, report generation and analysis. As part of our work, we will make recommendations for necessary infrastructure.

At the conclusion of the assessment, we will present a report evaluating the city's and the WAFC's overall internal preparedness with recommendations for priority areas requiring attention and resources needed in advance of launching the campaign.

## **B. Prospect Screening**

We will conduct a philanthropic screening and analysis of your prospects' capacity (financial resources available to share) and propensity (likelihood of making a major gift). Screening your prospect pool will help us identify your top campaign prospects and craft specific strategies and asks.

TWB has a strategic partnership with the wealth screening firm DonorSearch, which draws information from 30 unique databases of charitable and political gifts and publicly available financial information (including real estate and stock holdings) to provide a holistic view of prospective donors' interests and capacity. We are pleased to offer the City of Whitewater complimentary screening of up to 5,000 household records as part of this engagement.

Past giving to the WAFC is the best indicator of future philanthropy, and the second-best indicator is past giving to other charities. DonorSearch will match your prospects against more than 200 million publicly available gift records, which has the potential to provide information on their history of supporting other charitable organizations. When you see that one of your prospects has supported an organization at a given level, they are likely to have the ability to make a gift of that level to the WAFC as well (assuming proper cultivation and their interest in your mission and programs).

As the WAFC does not have a robust existing pool of annual or major donors to screen, TWB will work with the city and staff leadership and other key stakeholders to identify potential prospects. Because the WAFC is a critical and visible community resource and is highly regarded, it is reasonable to think that donors who have made gifts to other high-profile community organizations might consider a gift to the WAFC if a compelling ask were made. As such, we will compile a list of major donors to other community projects to add to the WAFC's screening pool.

Too many organizations take the initiative to screen their prospects for capacity, but then fail to incorporate the data into their day-to-day development activity. Effectively screening your prospect pool and identifying prospects with the greatest giving potential leads to smarter and more strategic fundraising. TWB has extensive experience interpreting wealth screening data. We will work with the WAFC's staff to understand what your screening results mean, as well as how to incorporate the findings into actionable strategies that focus staff and volunteer energies on the best major gift prospects.

We will work with project leadership to verify top and mid-level prospect profiles and glean any qualitative information that staff and volunteers can provide to inform our prioritized listing of

prospects for your campaign. These important metrics provide a foundation from which we can build an initial gift table for the campaign.

DonorSearch should be considered one tool in prospect research for determining donors' capacity and inclination, to be used as a guide to focus our conversations with the city on a pool of top prospects. City, WAFC, and community leaders' historical and current knowledge of prospective donors will help prioritize prospects with higher capacities while providing additional information on their philanthropic interests and giving.

### **C. Feasibility Study**

Collective fundraising experience has shown that between 80 and 90 percent of money given to campaigns typically comes from 10 to 20 percent of the total donors. For TWB to be confident that a proposed campaign goal is achievable, it is essential to test the goal with potential leadership-level prospects.

The feasibility study provides the opportunity for early conversations with campaign prospects and stakeholders. It serves as a "reality check" through which we seek external input on your case for support and campaign plan, and as a means of building interest and excitement among stakeholders and prospects who may be solicited early in the campaign.

The feasibility study will be structured as follows:

#### *1. Campaign Prospectus*

Once the Internal Readiness Assessment is completed, we will work collaboratively with the City of Whitewater's and WAFC's staff and volunteer leadership to develop a campaign prospectus to be used in feasibility interviews. This is an early version of the eventual campaign case for support, and presents an opportunity to test the campaign goal and specific campaign messages and funding priorities to confirm that plans for the WAFC expansion and renovation fully resonate with top potential donors. It also describes how the proposed campaign realizes the WAFC's core values and provides a compelling rationale for making a gift. It is a donor-centric, inspiring call to action that weaves together descriptions of the project with stories of potential impact and specific goals.

#### *2. Gift Table*

We will develop a gift table that articulates how many gifts at each level of giving the WAFC will need to achieve the proposed funding goal. We develop this campaign tool based on our analysis of the WAFC's current donors and known prospects and use it to identify gaps in the prospect and donor base that may challenge the campaign goal. The campaign prospectus and gift table are used together during the feasibility study to help prospects envision the campaign, test their

interest in key areas, identify potential giving levels, and to communicate the overall support necessary to reach the financial goal.

3. *Conduct Interviews*

Once we have completed the above steps, we will conduct 15-20 interviews, including focus groups, if needed, to test the inclination and readiness of potential donors to make financial commitments to the WAFC's capital campaign. TWB will partner with the WAFC to select the most promising interviewees. We suggest that the interviews be scheduled by the WAFC, not TWB, as we have found it to be the most efficient approach for our clients. This also allows you the opportunity to reassure the interviewees that they will not be solicited during the interview and that conversations will be confidential.

TWB believes feasibility interviews are a valuable tool for securing feedback that can impact campaign strategy. Equally important, these interviews provide a unique and highly meaningful opportunity for engagement and cultivation of potential donors.

We will design a customized interview discussion guide that covers a spectrum of questions and topics in order to test the case prospectus for the capital campaign as well as the financial goal.

The primary finding that we hope to secure from each interview is a gift indication. Normally, after discussing the case for support, which each interviewee will have received and read in advance, we present the proposed gift table and ask the interviewee if she/he would consider participating in the campaign and at what level. The sum of the gift indications, which in many cases are ranges, will help us to recommend a specific campaign goal.

In addition to the specific gift indications, we hope to secure qualitative data on how well the case prospectus resonates with interviewees, the enthusiasm they express in the vision and the specific plans for WAFC's expansion and renovation, as well as the confidence they have in leadership to realize that vision.

Our conversations with interviewees are usually 45-60 minutes long. Each interview will be 1:1 or 1:2 (in cases where the interviewee and their spouse/partner both participate) with either Grace Cichomska or Amy Funk. In our role as consultants, we are positioned to ask questions as a completely neutral party from outside the Whitewater community so interviewees can feel comfortable sharing their candid thoughts and opinions. TWB is open to conducting feasibility interviews in person, via Zoom, or a mix, depending on the preference of the WAFC and potential interviewees.

4. *Feasibility Study Report*

Once the interviews and focus groups are completed, we will provide a summary of potential support for the capital campaign, including our findings on the following:

- Resonance with the project goals
- Feasibility of the financial goal
- Potential source of gifts by donor types, range, and purpose
- Volunteer leadership pool and readiness
- Key campaign messages

Based on feedback from the campaign feasibility interviews, we will recommend any revisions to the campaign prospectus based on the feedback of the interviewees and include them with the report.

#### **D. Campaign Blueprint**

With the internal assessment, prospect screenings, and feasibility study completed, we will develop a campaign blueprint that provides a big-picture road map for successful implementation of the WAFC campaign. This blueprint will include but not be limited to:

- Proposed dollar goal
- Campaign gift table
- Campaign timeline
- Campaign volunteer leadership structure and training plan
- Campaign management structure, to include policies and reporting
- Preliminary campaign expense budget
- Prospect lists with initial targets
- Key campaign messages
- Gift cultivation and solicitation strategies
- Donor recognition and stewardship opportunities, including naming opportunities

#### **E. Campaign Counsel**

If the feasibility study indicates that the proposed campaign can proceed, or that identified elements of the plan need to be established to assure campaign success, TWB would be honored to serve the City of Whitewater and the WAFC as ongoing campaign counsel, providing both strategic and tactical direction and support as you implement the campaign. If selected, this work would seamlessly begin after the campaign plan was delivered.

Throughout the campaign, our participation would include, but not be restricted to, the following areas:



- Assistance in developing the final campaign case statement and all related campaign collateral.
- Drafting of campaign job descriptions – staff and volunteers
- Developing campaign policies
- Establishment of campaign progress reporting
- Delineation of the campaign budget
- Identification of donor recognition and stewardship strategies including proposed donor “touchpoints” leading up to the public phase launch
- Establishment of campaign progress reporting
- Identification and recruitment of campaign volunteer leadership
- Development of prospect lists, cultivation and solicitation strategies, and moves management plans
- Oversight of prospect screening and rating meetings
- Identification of donor recognition and stewardship strategies
- Planning of key campaign events
- Ongoing modification of the campaign plan

In the early stages of the campaign, our role would be quite hands-on, as together we would develop strategies for the crucial early solicitations, assign prospects, prepare solicitation materials, develop communication strategies, conduct solicitation training for staff and volunteers, and track early progress and follow-up activities. We would participate in meetings of the campaign committee, at which discussions of any campaign-related issues and plans for future solicitation activities usually occur. We are also regularly involved in less formal meetings of one or two campaign volunteers, particularly as they prepare for campaign solicitations.

In all of this work, we would collaborate with you as partners. Our ultimate assignment would be to prepare you to move ahead confidently with the campaign, knowing what must be done, by whom, against what schedule, with what allocation of resources in order to achieve your campaign funding goals. We see our role as helping to assure the success of the campaign as well as building the capacity of the city and WAFC’s staff and volunteers to work from a stronger position at the conclusion of our service than at the beginning.

### III. Project Timeline

TWB is prepared to begin work on this engagement in Fall 2024. The time it takes to conduct an organizational assessment and feasibility study is typically 4-5 months. Scheduling the one-on-one feasibility study interviews may impact the amount of time it might take to complete the study.

Initial Timeline	Activities
<p><b>Internal Readiness Assessment (October- November, 2024)</b></p>	<ul style="list-style-type: none"> <li>• Conduct internal readiness assessment                             <ul style="list-style-type: none"> <li>○ Review documents and conduct internal interviews</li> <li>○ Complete summary report of findings and recommendations, present to City and WAFC leadership for feedback</li> <li>○ Finalize report and present executive summary to the City of Whitewater Common Council if requested</li> </ul> </li> <li>• Conduct philanthropic screening and analysis.                             <ul style="list-style-type: none"> <li>○ Prioritize top prospects and determine campaign goal to be tested</li> </ul> </li> <li>• Partner with staff in the creation of the campaign prospectus</li> </ul>
<p><b>Feasibility Study and Campaign Blueprint (November 2024-February 2025)</b></p>	<ul style="list-style-type: none"> <li>• Create gift table to test in the study</li> <li>• Develop an interview guide</li> <li>• Identify and prioritize 15-20 potential interviewees and secure interviews or focus group participation</li> <li>• Conduct feasibility study interviews and focus groups</li> <li>• Prepare feasibility study report and campaign blueprint; present to leadership for feedback</li> <li>• Finalize report and present an executive summary to identified city and WAFC leadership and the Common Council if requested</li> </ul>
<p><b>Campaign Counsel (6 months with option to extend through end of the campaign)</b></p>	<ul style="list-style-type: none"> <li>• Partner with the city and the WAFC to implement, and adjust as needed, the campaign blueprint and recommendation based on the recommendations from the internal assessment and feasibility study</li> <li>• Provide strategic and tactical direction in all areas detailed in the campaign blueprint</li> <li>• Track campaign progress and work with leadership to seize opportunities and overcome obstacles throughout the life of the campaign</li> </ul>

### IV. Fee Structure

The fees associated with our proposed engagement are as follows:

Phase of Work	Fee
<p style="text-align: center;"><b><u>Campaign Planning Study</u></b></p> <ul style="list-style-type: none"> <li>• Internal Readiness Assessment</li> <li>• Feasibility Study</li> <li>• Campaign Blueprint</li> </ul>	<p><b>Comprehensive fee: \$45,000</b> includes DonorSearch philanthropic screening fees</p>
<p style="text-align: center;"><b>Campaign Counsel</b> Execute and Manage the Campaign</p>	<p><b>Retainer fee: \$6,000</b> per month for 6 months with option to extend</p>
<b>Total Fee:</b>	<b>\$45,000 - \$80,000</b>

The fee covers all on-site consulting activity as well as consulting time required off-site by Zoom, telephone, fax or e-mail. Screening of donor records is also included. Out-of-pocket expenses, including travel and report production are additional and billed at cost.

One-third of the pre-campaign planning fee will be invoiced at the time of engagement, the second third is billed at the conclusion of the first 60 days of service, and the final third is due upon delivery of the campaign plan. Once the campaign launches and if service transitions to ongoing campaign counsel, the campaign retainer fee will be invoiced monthly.

### V. History, Experience, and Track Record

#### A. About TWB

The result of a merger between two Chicago-area consulting firms in 2003, Ter Molen Watkins & Brandt offers our clients great depth and breadth of experience in all facets of not-for-profit advancement. TWB consultants have served in leadership development roles of research universities, liberal arts colleges, major health care institutions, and some of the largest and most distinguished cultural institutions in the country. With offices in Chicago, Milwaukee, and on both coasts, we serve clients all over the country.

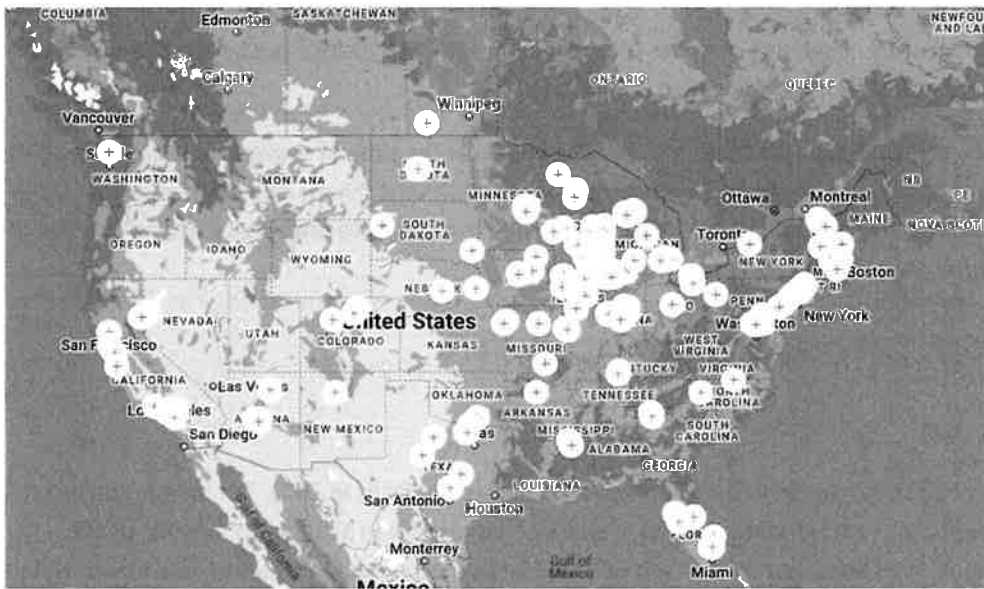
Ter Molen Watkins & Brandt has conducted over 100 campaign planning and feasibility studies for a diverse range of nonprofit institutions. We have tested campaign goals ranging from \$1 million to

\$500 million, and we have interviewed thousands of constituents, testing personal giving intentions as large as \$100 million. We have helped clients plan for and succeed in raising billions of dollars to advance their causes.

All TWB clients collaborate directly with experienced consultants. Our consultants average more than twenty years in positions as fundraising and nonprofit professionals, applying decades of experience, expertise, and professional best practices in work with our clients. We have built a reputation for excellence, and more than 60% of our consulting engagements now come from former clients.

A high degree of customized attention is the hallmark of our firm. With each client, we take its size, needs, and goals into account to maximize impact at any scale. We provide ongoing counsel, partnering with our clients to ensure that they are successful. We aim for more than achieving campaign dollar goals. We work to build organizational capacity to ensure that each client will be a stronger organization in the future.

As the attached client list reflects, we have worked with many leading not-for-profit organizations. We are proud to be the consulting firm of record for several high-profile capital campaigns, and we are equally proud of the smaller organizations that have selected us to work with them on fundraising programs that significantly impact their own constituencies.



*TWB has clients from coast to coast.*

## B. Values and Purpose Statement

We believe in the noble mission of nonprofit organizations, bringing people together for the common good, giving shape to dreams and high ideals, encouraging civic engagement, solving problems, and creating opportunities that make the world a better place.

Our purpose is to partner with nonprofits in their pursuit of these ideals, assessing strengths and weaknesses, building organizational and fundraising capacity, envisioning future direction, and designing pathways to success and lasting impact.

We value each client as distinctive, listening actively to the perspectives of all stakeholders—board members, staff, donors, volunteers, beneficiaries, community members, and strategic partners—to tailor strategies that address each organization’s collective challenges, priorities, and aspirations.

Our consulting style is collaborative: Clients bring knowledge of their organizations, their histories and cultures, their successes, and their challenges. We bring objectivity, perspective, knowledge, and expertise.

We are committed to ethical practice, integrity, honesty, diversity, equity, and inclusion in our work and client relationships.

## VI. Staffing for the Whitewater Aquatic and Fitness Center

All TWB clients work directly with senior consultants—there are no junior associates added to project teams. With 15 We conduct our own interviews and assessments, and we write our own reports and analyses.

The consultants proposed for this project are Grace Cichomska, Senior Counsel, and Amy Funk, Senior Vice President. Each has more than twenty-five years of experience in fundraising and nonprofit leadership, including successful first-hand experience as accomplished development officers working in a variety of nonprofit institutions.

As senior consultants, each of us will work alongside you, both as a team and individually, bringing our unique expertise and skill sets to achieve project objectives including our hands-on experience at various scales in:

- Designing, managing, and implementing annual, major gift and capital campaign fundraising strategies
- Assessing an organization’s readiness for a campaign, making recommendations that increase skill and capacity
- Creating plans and timelines that honor the culture and priorities of the organization
- Coaching proficiency with chief executives, fundraising staff, and volunteers

- Motivating campaign committees, development committees, and boards of directors to engage as active partners with staff in the fundraising process
- Exercising flexibility and course correcting as needed
- Navigating complex campaign fundraising strategies

Grace Cichomska will serve as the Project Lead for this assignment. As such, she will be responsible for overseeing the progress of activity and will serve as the central point of contact within the firm. She will share the day-to-day project work with Amy. In-depth bios for Grace and Amy are included at the end of this proposal.

**Grace J. Cichomska** *Senior Counsel*

Grace's fundraising career spans more than 30 years including senior leadership positions at St. Xavier University, DePaul University, Lurie Children's Hospital and Dominican University. She has also served several cultural, social service and educational organizations in various capacities. Grace's experience includes campaign strategy and execution, staff recruitment, training and development of staff and volunteers, and partnering with institutional and volunteer leaders to maximize results. Her particular area of expertise is campaign management and major gifts fundraising. She has personally worked on several multi-million dollar naming gift commitments. Grace has managed capital campaigns with goals that span from \$1M for a domestic violence shelter to \$600M for a new children's hospital. She recently joined the firm after completing a highly successful campaign at Dominican University in which TWB was campaign counsel.

**Amy Funk, Senior Vice President**

Amy brings over two decades of high energy, results-driven nonprofit leadership to her clients. She helps nonprofits refine their mission driven storytelling, maximize their revenue, and ensure that the right people are in place for capacity building. She has provided counsel to organizations with budgets ranging from \$1.2 to \$40 million in the performing arts, healthcare, and human services fields. Her clients are national in scope, with a long history of Milwaukee area nonprofits. Recent and current clients include Wisconsin Conservatory of Music, YMCA of Metropolitan Washington, and Meals on Wheels Foundation of Northern Illinois. Mentoring development professionals is a key passion, and she led the Annual Fellows Program of the Development Leadership Consortium. She also serves on the Association of Fundraising Professionals Chicago Board of Directors.

## VII. References

The following examples of medium and large capital campaigns address our experience with helping our clients achieve their campaign goals. TWB provided continuous service throughout each campaign.

Wisconsin Conservatory of Music  
Greater Milwaukee, Wisconsin



### **September 2018 – March 2020 (launch of public phase)**

TWB to successfully launched a \$7.5 million capital campaign for WCM, moving directly into full campaign mode after their initial groundwork. The team provided campaign counsel up until the launch of the campaign's public phase, at which point WCM had raised 90% of their goal. They went on to successfully hit their campaign goal.

Important considerations: This client had a feasibility study done by another consulting firm and began their campaign, which then stalled. TWB was brought in to reboot the campaign and guided it to successful completion. The campaign successfully reached its goal, 90% of which was committed before the campaign went public. Our firm has recently been re-hired to launch a full campaign assessment and feasibility study for WCM with an eye towards a 2024 campaign.

### **Contact Information**

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Wisconsin Conservatory of Music  
414-459-3440(direct)  
262-290-1253(cell)

Gaia Home  
Bismarck, North Dakota



### **March 2021 – March 2023**

TWB conducted an organizational assessment and feasibility study for Gaia Home, testing a \$35 million campaign goal, and recommended a goal of \$12 million. Building infrastructure and developing a prospect pipeline was a cornerstone of our work. Once the feasibility study was completed, TWB served as counsel for a year until the campaign committee and organization were ready to take over the continued campaign. Gaia Home is now almost 50% towards their campaign goal.

Important considerations: Gaia Home was a brand-new nonprofit, and part of our work was conducted before they had their nonprofit certification. We were involved in not only identifying prospects,

recruiting a campaign committee, and helping to coach initial asks, our firm also aided in selecting fundraising software and building internal infrastructure.

**Contact Information**

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Plymouth Place Senior Living  
LaGrange, Illinois



**February 2022 – February 2023**

TWB conducted a campaign readiness study in support of new facilities and renovations, including a Health & Wellness Center. Informed by the results our internal assessment of its fundraising program and volunteer leadership, a feasibility study, and the development of a case prospectus and campaign blueprint, the organization launched a capital campaign which is completing its first year with notable progress and several naming gifts. We worked with the client in creating a structure for its major gift solicitations and strengthened marketing efforts for planned gifts in support of endowment.

**Contact Information**

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