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Town of Aurora

# General Committee Report

No. CMS22-014

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**Subject:** Aurora Town Square Status Update – Capital Campaign

**Prepared by:** Phillip Rose, Manager of Aurora Town Square

**Department:** Community Services

**Date:** March 1, 2022

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## Recommendation

1. That Report No. CMS22-014 be received; and
2. That the Aurora Town Square Bridge, Outdoor Square, and Church Street Schoolhouse be approved as a Name Sale opportunity; and
3. That staff be directed to initiate negotiations with potential partners for the purpose of naming the Aurora Town Square Bridge, Outdoor Square, and Church Street Schoolhouse.

## Executive Summary

This report provides a status update on the Aurora Town Square Capital Campaign and recommends that Council approve the Aurora Town Square Bridge, Outdoor Square, and Church Street Schoolhouse as a Name Sale opportunity in accordance with the Facility Naming Rights Policy and direct staff to begin negotiations with potential partners to name the Aurora Town Square Bridge, Outdoor Square, and Church Street Schoolhouse.

- Based on the scope of work included in the Request for Proposals, the campaign consultant has been largely successful in meeting the contract deliverables.
- The campaign has been profitable thus far, but there is more work to be done to reach the overall campaign goal of \$5 million.

## Background

On February 22, 2021, Mayor and Council were notified by internal memo that Interkom Inc. was awarded a contract in the amount of \$68,500 to commence the ATS Capital Campaign. The memo also stated that the fundraising goal was \$5 million, and that until the campaign was cash flow positive, campaign expenses were to be drawn from the ATS operating budget.

Council also received a Closed Session campaign update on July 6, 2021. The report presented Council with a shortlist of donor prospects to be approached and stated that once the collateral material and campaign tools were developed, prospective donors would be contacted starting in September 2021. It was also noted that the fundraising goal was designed so that the funds raised could support a variety of opportunities including, but not limited to, asset replacement, program subsidy, facility enhancement, public art, operating budget offset and capital cost. During negotiations with donors, it would be determined how they prefer their funds to be assigned/allocated.

## Analysis

**Based on the scope of work included in the Request for Proposal, the campaign consultant has been largely successful in meeting the contract deliverables.**

Since February, the consultant has worked with staff and the Mayor's office to accomplish the following:

- Project kick-off meeting in March 2021.
- Multi-faceted capital campaign plan and fundraising strategy: Divided into two phases, the consultant developed a campaign fundraising strategy that has started with a Quiet Phase and included the development of a naming assets valuation and gift chart based on the overall fundraising goal. In total, there could be 33 naming opportunities, representing over \$5 million in possible naming gifts.
- Cultivation of lead and insider gifts, including donor research, identification, approach, solicitation, and follow-up.
- Campaign collateral material: Based on ATS branding, the consultant finalized the creative design of a presentation folder, campaign letterhead, a placemat showcasing major naming opportunities, and the case for support presentation.
- Capital campaign tools and implementation plan: In addition to the above, the consultant developed a pledge agreement, letter of intent, customized 'ask'

presentations based on donor prospects, and a stand-alone website that will go live in 2021 to support the Public Phase of the campaign.

- Plan/strategy for ongoing donor stewardship and cultivation: Donor stewardship and cultivation has been an ongoing part of the campaign based on leads, prospects generation, research, and the outcome of the construction site hard hat tours.
- Plan/strategy for ongoing donor tracking and recognition, and capital campaign recognition: The consultant has organized and maintained a donor contacts database. Once naming gifts are secured, individual gift terms and donor recognition will also be tracked. The consultant has also started researching other donor recognition opportunities, such as a Donor Recognition Display.

**The campaign has been productive thus far, but there is more work to be done to reach the overall campaign goal of \$5 million.**

While the capital campaign has achieved a number of important milestones, there are several next steps to be undertaken to reach the campaign's overall goal. Based on the naming opportunities identified, it is estimated that between 103 and 155 donor prospects will need to be approached (some multiple times) to achieve the campaign goal. To date, of the possible 155 donor prospects, the campaign has targeted a small group of high-net-worth individuals to secure major gifts first, which will be followed by a community campaign later this year. The following is the remaining scope of work necessary to complete the entire campaign:

#### 1. Continued Capital Campaign Implementation

- Ongoing hard hat tours and targeting of lead gifts
- Regular status update for the Mayor's office and staff
- Stewardship with donors
- Updates to donor solicitation packages as required
- Contract draft for naming gifts for major lead gifts
- Ongoing research and donor identification to maintain a healthy donor prospect pool
- Pledge agreement administration, follow-up, and tracking

#### 2. Community Campaign Announcement and Donor Recognition Events

- Coordination of donor recognition events, including event protocol and invitee selection
- Collateral design and production (i.e., invitation, mailing, signage, etc.)

- Event videography and post-production
- Work with the Corporate Communications Division and donors regarding press release(s), when needed

### 3. Community Campaign Implementation

- Community campaign development and roll-out
- Direct Mail (DM) campaign to High-Net-Worth households, including postal code selection, creative design of DM piece, print production and lettershop
- Community campaign donor gifts follow-up, facilitation, finalization, and tracking

### 4. Donor Communications and Donor Recognition

- Newsletters for donors, including creative design, production, and distribution
- Donor database management and gifts tracking, including populating recommended donor tracking software
- Launch, hosting, and maintenance of community campaign website
- Donor recognition display planning, evaluation of RFP submissions, and participation in interviews with shortlisted candidates
- Donor recognition display approval facilitation
- Video production

## **Advisory Committee Review**

Not applicable.

## **Legal Considerations**

The capital campaign is being guided by the Facility Naming Rights Policy to ensure Aurora Town Square naming rights and donor recognition are aligned with the Principals, Procedures, and Criteria established in the Policy. Legal Services has reviewed and will continue to review and provide legal advice on any agreement and templates arising out of this campaign, including the pledge agreement and letter of intent.

## **Financial Implications**

To date, all capital campaign costs have been funded from the Town's Aurora Town Square operating budget. As the campaign progresses, all arising expenses will continue to be funded from this same operating budget as sufficient funds are anticipated for 2022.

## Communications Considerations

Corporate Communications will support the key developments of the ATS capital campaign by creating any needed media products or providing support in reviewing marketing materials.

## Climate Change Considerations

The recommendations from this report do not impact greenhouse gas emissions or impact climate change adaptation.

## Link to Strategic Plan

Aurora Town Square supports the following Strategic Plan goals and key objectives:

**Supporting an exceptional quality of life for all** in its accomplishment in satisfying requirements in the following key objectives within these goal statements:

- **Invest in sustainable infrastructure**
- **Celebrating and promoting our culture**
- **Encourage an active and healthy lifestyle**
- **Strengthening the fabric of our community**

**Enabling a diverse, creative, and resilient economy** in its accomplishment in satisfying requirements in the following key objectives within these goal statements:

- **Promoting economic opportunities that facilitate the growth of Aurora as a desirable place to do business**

## Alternative(s) to the Recommendation

1. Council may provide further direction.

## Conclusions

The Aurora Town Square Capital Campaign has been successful to date, however, there is more work to be done to achieve the campaign goal of \$5 million. Staff are seeking Council's approval of the Aurora Town Square Bridge, Outdoor Square, and Church Street Schoolhouse as a Name Sale opportunity in accordance with the Facility Naming Rights Policy and direction to begin negotiations with potential partners to name the Aurora Town Square Bridge, Outdoor Square, and Church Street Schoolhouse.

## **Attachments**

None

## **Previous Reports**

CMS19-030, Closed Session - Library Square Capital Fundraising Campaign Feasibility Study, December 3, 2019

CMS21-026, Closed Session - Library Square Capital Campaign – Progress Update, July 6, 2021

## **Pre-submission Review**

Agenda Management Team review week of February 14, 2022

## **Approvals**

**Approved by Robin McDougall, Director, Community Services Department**

**Approved by Doug Nadorozny, Chief Administrative Officer**