FORUM ON CAPITAL CAMPAIGNS

Chad Borgestad, Consultant
Shane Scott, Consultant

Wednesday, February 15, 2023
We are a team of 32 professionals located in 13 states around the US.

We currently serve 93 clients in 32 states and 3 countries.

40 Active capital campaigns

$1.1 Billion Combined campaign goals

$1.8M $275M Range of campaign goals
The FOCUS Group’s key Core Values drive how we serve clients and each other.

**Relationships**
We believe in building long-term relationships with clients, walking alongside them over multiple engagements and many years.

**Integrity**
We seek to do what’s right, and we lead honestly with strong moral principles. We tell the truth, and we do what we say we’ll do.

**Leadership**
We take the initiative with our clients, prospects, and colleagues; “the ball is always in our court.”

**Client Focused**
Our efforts are driven by our clients’ needs and their best interests. We seek to maximize the value we provide to our clients, serving them diligently and with excellence.

**Team**
We work as a team to leverage the best skills and experience of our team members in order to serve our clients with the best possible counsel to further their mission.
Session 1: Principles and Practices of Fundraising

Chad Borgestad, Consultant
Shane Scott, Consultant
Six Key Principles of Fundraising

1. People give to people they know and people they trust
2. People give because they are asked and shown how
3. People give when they are involved and have a sense of ownership
4. Giving is a way of life
5. A “no” is never forever
6. Proper planning maximizes results and minimizes costs
The Taking Donors Seriously® Framework

- Case
- Leadership
- Prospects
- Strategy
- Plan
Leadership

- Staff
- Volunteers
Case Statement

Example Case for Support
Prospects

- Donor List: Current and Lapsed
- Evaluate
- Relationships
- Financial Capacity
Prioritizing Prospects

- TIER 1
- TIER 2
- TIER 3
- TIER 4
"Smallest number of donors we can talk with, to raise the largest amount of money?"
The PLAN

● Written
● Annual
● All donor asking and thanking activities
● Calendar with timeframes and projects
Session 2:
Capital Campaigns:
Built on a Strategic Plan

Chad Borgestad, Consultant
Shane Scott, Consultant
How a Relevant Strategic Plan Serves your Campaign: Seven Markers
Agile and Dynamic

- Plans built on assumptions... **assumptions change!**
- Capital campaign timeframe
- Strategic plan MUST remain relevant
- Financial partners’ confidence:
  - Plan exists
  - Solid plan
  - Plan remains relevant
Inspiring

- God’s vision and your school’s future
- Strategic Narrative: Vision if strategic goals met
- Case Statement catalyst
- Larger vision drives campaign goals
Clear and Unifying

- Strategic plan: easy to read, clear, inspiring
- Foundation for clear and compelling Case Statement
- Unifies internal community
  - Administration, faculty, staff, students
- Unifies external constituencies
  - Alumni, churches, broader body of Christ
Strategic Plan and Stakeholders

- Must consider views and key constituencies’ input
- Attention to process
  - not too top-down
  - not too broad
- Results
  - high level of ownership
  - carries into capital campaign
  - funds strategic goals
Spirit-Led

- Strategic plan and the Holy Spirit
- Process and final product: equally important
- Process unites community around your vision
- Vision articulates God’s vision for your school’s future
- Capital campaign follows same Spirit-led commitment
Implementable Plan

● Capacity and expertise to implement
● Points to capacity needs
● Informs your campaign and goals
● Integration of strategic plan and campaign strategy
Strategic Thinking Culture

● Strategic thinking: More important than a plan
● “In preparing for battle I have always found that plans are useless, but planning is indispensable.” – Eisenhower
● Cannot afford not think strategically all the time!
● Strategic thinking culture
  - Key to campaign success
  - Flexibility to make changes
Summary

- Relevant strategic plan critical to capital campaign success
- Dynamic strategic plan must drive daily decisions
- Dynamic strategic plan engenders strategic thinking culture
The best chance you have to move strategically into an unknown future is to create a strategic thinking culture across your organization and let God speak to you through it.

Questions?
FORUM ON CAPITAL CAMPAIGNS

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Session 3:
The Feasibility Study Process

Chad Borgestad, Consultant
Shane Scott, Consultant
Feasibility Study Phases

**PHASE 1: Set Up**
- Case Statement development
- Prospect list analysis

**PHASE: 2: Interviews**
- 20-25 in-person

**PHASE 3: Report**
- Relevant historical data analysis
- Campaign Capacity Review Report findings and recommendations presentation
Case Development

- Presentation Tool
- Communicates and clarifies your vision
- "What and how" of your work
- Demonstrates measurable impact of your work
- Shows partners the cost and gift plan
Prospects

● Evaluate
● Research: Generosity Screening and Snapshots
● Prioritize
Interviews

- 20-25 individuals and foundations
- Feedback about
  - Your school
  - Case Statement
  - Campaign involvement interest
Recommendations Report

● Respondents’ thoughts:
  - School and leadership
  - Specific initiatives and interest level
● Donor giving capacity
● Volunteer and staff leadership
● Timeline and budget
Questions
Session 4:
Overview of a Capital Campaign
Characteristics of a Healthy Campaign

- Unity among leadership: campaign goals and purpose
- Campaign ties in to healthy strategic plan
- Major Campaign support: systems and staffing
- Campaign counsel received and utilized
- <10% of donors giving 90%+
- Top 3-5 gifts > 40% of goal
- Effective, committed campaign leaders and volunteers
Case
Leadership
Prospect
Strategy
Plan
Staff Leadership

- Campaign Manager
- 25-40% of Superintendent's Time
- Additional staff positions may be needed, based on recommendations
Volunteer Leadership

- Board Ownership
- Campaign Committees
  - Campaign Steering Committee (CSC)
  - Executive Campaign Committee (ECC)
Prospects

- ≤ 60 donors give 90%+ to campaign
- Top 5-7 gifts = 40%
- 100% Board participation
Strategy and Plan

Basic Campaign Cycle: five (5) years

1 year Preparation (planning and capacity review)

1 year Stewardship

2-3 years in Campaign
Campaign Strategy and Plan

Five distinct phases:

- Lead Gifts (40%)
- Major Gifts and Board (30%)
- New Major Donors (20%)
- Public Phase (10%)
- Stewardship Phase
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