



# FORUM ON CAPITAL CAMPAIGNS

*Chad Borgestad, Consultant*

*Shane Scott, Consultant*

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# The FOCUS Group

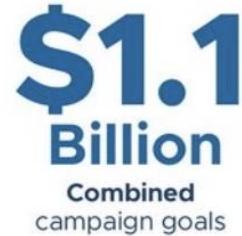
[www.theFOCUSgroup.com](http://www.theFOCUSgroup.com)



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.





### **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.

**The FOCUS Group's  
key Core Values  
drive how we serve  
clients and each  
other.**





# **Session 1: Principles and Practices of Fundraising**

*Chad Borgestad, Consultant*

*Shane Scott, Consultant*



# Six Key Principles of Fundraising

People give to people they know and people they trust

People give because they are asked and shown how

People give when they are involved and have a sense of ownership

Giving is a way of life

A "no" is never forever

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

# Strategy

**"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?





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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

*Chad Borgestad, Consultant*

*Shane Scott, Consultant*



# 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

**Step 1: Strategic Planning**

**Step 2: Feasibility Study**

**Step 3: Launch Campaign**



**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

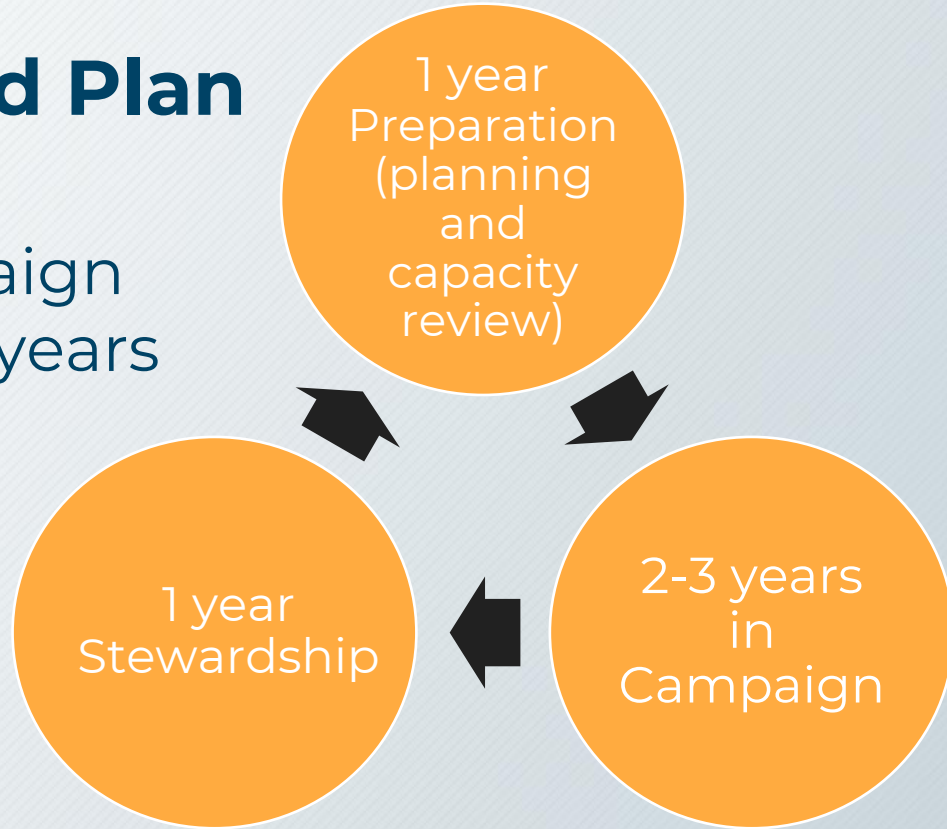
- Board Ownership
- Campaign Committees
  - Campaign Steering Committee (CSC)
  - Executive Campaign Committee (ECC)

# Prospects

- $\leq 60$  donors give 90%+ to campaign
- Top 5-7 gifts = 40%
- 100% Board participation

# Strategy and Plan

Basic Campaign  
Cycle: five (5) years



# 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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