

# Strategic Fundraising

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Foundation Academy – Winter Garden, FL



FOUNDATION ACADEMY

Foundation Academy is a PK3-12 Christian School serving 600 students in Winter Garden, FL. The school has been a ministry of 1<sup>st</sup> Baptist Church of Winter Garden for over 50 years. Foundation Academy needed a plan to address a \$9M debt load, depletion of reserves, and an annual budget designed to depend on significant fundraising. Our goals were to develop a comprehensive plan for raising annual contributions, develop and launch an annual fund, and begin to establish a culture of giving whereby raised funds can be directed to development as opposed to survival.

In recent years, development efforts have been largely unsuccessful at Foundation Academy, and this struggle came at a time when funds were needed the most. While vision and direction for the overall school program has been strong, this has not been true in the area of finance and fundraising. The creation of an Annual Financial Development Plan provided the road map for stability and success in fundraising. Creating a sense of ownership of this process amongst the entire faculty and staff has proved to be a challenge – one that we will continue to undertake moving forward. While we established aggressive fundraising goals for this year, we have come remarkably close to achieving them. Praise God!

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## **Strategic Fundraising**

Foundation Academy, a PK3-12 Christian school serving 600 students in Winter Garden, FL was blessed to be housed at the church of which it is a ministry, First Baptist Church of Winter Garden, for the first fifty years of its existence. At the height of the economy, which equated to a considerable “boom” in central Florida, the leadership at Foundation Academy made the decision to build buildings and move the school to a new piece of property. Initially, the plan was to relocate all grades (PK3-12) simultaneously. After the economy began its decline, and capital fundraising weakened, it was decided to move only the secondary school to the new campus and follow suit with the lower school as funds were made available. I arrived as Headmaster three months before our move. I quickly discovered that along with our beautiful new campus came a debt load of \$12M. Further, repayment had been structured to the aggressive tune of \$1.2M annually.

Five years and two refinances later, we find ourselves \$9M in debt and paying on an interest only loan. At the launch of my Van Lunen project, Foundation Academy was coming off the heels of back to back years with next to zero fundraising income, three different Directors of Development, and two failed Philanthropy Cabinets. Meanwhile, enrollment had held steady overall. Unfortunately, the theory, “If you build it, they will come” did not hold true in this economy.

Needless to say, a complete overhaul in strategic fundraising was desperately needed. Our newest Director of Development and I needed an education on appropriate and effective philosophy and methodology to create a culture of giving at Foundation Academy. The Van Lunen experience could not have been timelier. I have returned from Van Lunen training each time prepared to apply sound principles gleaned from the training. Further, my consultant provided much wisdom that enabled us to gain success at a time when it was vital.

Foundation Academy needed a plan to address a \$9M debt load, depletion of reserves, and an annual budget designed to depend on significant fundraising. By creating and implementing a strategy for development, budgeting could become a proactive effort designed to move the program forward rather than just maintain operations. Our Van Lunen consultant, Don Distelberg of the Timothy Group, helped us design this strategy. We began our project by establishing the following goals:

- Develop a comprehensive plan for raising annual contributions
- Develop and launch an annual fund
- Begin to establish a culture of giving whereby raised funds can be directed to development as opposed to survival

It was determined that our comprehensive plan for raising annual contributions could best be captured and published in the form of an Annual Financial Development Plan (AFDP).

We prepared this document and received Board approval to move forward with implementation at the beginning of the school year. The AFDP would ultimately chart the course for accomplishing all three goals. It incorporated four major strategies for raising funds and assigned specific revenue goals to each strategy:

### **1. Personal Solicitations**

<b>Goal</b>	\$250,000
<b>Raised</b>	\$210,000

**Plan:** These would be individual asks made by the Director of Development or me after developing relationships with individual parents, grandparents, church members, or individuals in the community. This revenue goal was thought to be quite aggressive considering the sum total from the preceding year was roughly \$15,000. Despite the still sinking economy, it was thought that we would have ample opportunity to “pluck the low-hanging fruit” represented by three years of new parents that had never been asked beyond an email blast.

**Execution:** With an intentional focus on cultivating relationships with potential donors, we began to see significant results this year. Don Distelberg led us through the development of a document for each potential major donor entitled Leadership Proposal. In this document, I cast a clear vision for the future of Foundation Academy and the impact that a gift could have. A Leadership Proposal was personalized for each donor and presented to them individually as a tool and takeaway for the ask. While we have come up short of our goal for individual solicitations, we are encouraged by the momentum, and we anticipate that it will only accelerate.

## 2. Annual Fund

**Goal**      \$50,000  
**Raised**    \$47,000

**Plan:** This would be the inaugural year for an annual fund at Foundation Academy. Our school, as many faith-based schools, operates with a gap between tuition revenue and the cost of operations. While this fact further magnifies our financial need and stands as the very thing that many schools use as the target for their annual funds, we decided, instead, to name financial assistance to families in need as the target.

**Execution:** Multiple communications via email and newsletter were made regarding the importance of participating in the annual fund, regardless of amount.

Unfortunately we found that even many of the staff were hesitant to give to the annual fund. The results in this department were not encouraging; however, experts in the field have told us that it can take 2-3 years to educate your primary constituencies on participation in an annual fund and create a culture that “buys in.”

## 3. Friends of Foundation Dinner

**Goal**      \$25,000

**Raised** \$0

**Plan:** Our plan here was to reach beyond Foundation families into the community to individuals of means and invite them to a small ask event. Don Distelberg directed us to utilize the in-house relationships we have to connect outwards to some of the resources in the community.

**Execution:** Unfortunately, the connections on which we planned to capitalize never materialized. In-house families were not eager to connect us to their colleagues for the purposes of an ask event. This is a concept on which we have not given up, but it has been postponed until our infrastructure can support it.

#### 4. Christmas Letter

**Goal** \$5,000  
**Raised** \$5,000

**Plan:** This simply entailed me writing an ask letter just before the calendar year-end to our school families.

**Execution:** We received several small gifts totaling our goal.

**Planned Total** \$330,000

**Actual Total** \$260,000

In recent years, development efforts have been largely unsuccessful at Foundation Academy, and this struggle came at a time when funds were needed the most. While vision and direction for the overall school program has been strong, this has not been true in the area of finance and fundraising. The creation of an Annual Financial Development Plan provided the road map for stability and success in fundraising. Creating a sense of ownership of this process amongst the entire faculty and staff has proved to be a challenge – one that we will continue to undertake moving forward. While we established aggressive fundraising goals for

this year, we have come remarkably close to achieving them. Praise God! Some of our specific results follow:

- Created an Annual Financial Development Plan (AFDP) for Foundation Academy to be driven primarily by the Director of Development and the Headmaster
- The AFDP provided direction in embracing new fundraising strategies for the school including: personal solicitation, annual fund, events, and mail appeals
- Raised \$260K of a \$330K goal
- Experienced an 800% increase in annual funds raised
- Established relationships with donors that will continue to be partners

Numerous lessons were learned throughout the process. The last item mentioned above is maybe the most important accomplishment, as we believe we are now positioned for greater success in the fundraising department for years to come. As Jesus demonstrated, it is always about relationships. I found that the benefits of growing relationships go far beyond any resulting dollars raised. This was the most important lesson. Others follow:

- Detailed planning breeds success
- Cultivating relationships with individuals and families that have truly bought into our mission is critical for success
- Establishing clear, concrete goals creates motivation and makes the target feel more realistic
- Prior to getting involved again, time is required for some individuals to heal from past failures on our part
- Varied, continual communication of mission is required to create a culture for giving
- All faculty and staff are part of the Development team

Without question, many challenges lie ahead in our fundraising adventure. The economy seems unrelenting. However, the major result of this project is that the groundwork is now laid for success due to a clear vision and strategy from which we have already experienced some success. May God pour out His blessings on Foundation Academy, and may He receive all the glory.