

# **Blueprint for Excellence: Development of a Campus-wide Capital Campaign Model**

Provost & Vice President for Academic Affairs, Vice president for Student Affairs, Vice President for Business, Finance and Facilities, and Associate Vice President for University Advancement

\$40,000 - \$50,000

Submitted by:  
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University Advancement

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Provost and Vice President for Academic Affairs

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## **I. Title**

### ***Development of a Campus-wide Capital Campaign Model***

## **II. Abstract**

Eastern Oregon University *must* develop more private resources in order to sustain itself and expand the institution. An initial investment of \$40,000 - \$50,000 will allow the University to work with a consulting team to create a specific EOU fundraising model. Designed as a comprehensive capital campaign, this model will reflect the needs of the entire University and assist in prioritization, allowing for maximum growth, sustainability, increased funding of critical needs, and resource diversification.

## **III. Rationale**

The key to any organization's success lies in that organization's ability to work cohesively toward a shared goal. Eastern Oregon University has set multiple goals and is actively looking forward to serving an ever-increasing number of students, expanding university and community-based programs, and strengthening our regional and national presence however; as state support decreases, private fundraising is becoming ever more critical. Diversifying EOU's funding sources to include a larger portion of private funds is vital to both our success and sustainability.

Creating a comprehensive fundraising strategy, specific to EOU, allows the institution to continue current operations and better estimate the rate at which we will be able to grow our services. Best fashioned by working with a consulting group who is able to look independently at the University's needs, community resources and fundraising trends, the Office of University Advancement propose hiring a successful consulting firm to both help us gather input from across the campus and construct a university-wide capital campaign model.

Currently, EOU has *over 20* separate fundraising projects and priorities. By defining this capital campaign as an organized effort to collect substantial funds for *all* University

programs, the consultants will address how the Foundation, Colleges, Athletics, Academic Programs and other campus entities can prioritize their fundraising needs to best reflect the sustainable institutional goals of the University.

Assuming the consultants' recommendations reflect that initiating *and maintaining* a capital campaign is feasible, the Office of Advancement will be able to utilize the collected information to launch a custom designed campaign that reflects the priorities identified by campus entities and University leadership. The campaign team will also outline appropriate benchmarks of success, timeframes and assessed capacity (how much we are likely to raise) by comparing our fund-raising model to other university's nation-wide.

#### **IV. Draft Budget**

Based on current market rates, an investment of \$40,000 to \$50,000 on a consulting firm would **yield a multi-million dollar return**. Specific rationale detailing the cost is outlined on the following page. The information exhibited reflects returned Requests for Proposals (RFP's) for a similar study performed by one of our Community College partners. Campaigns are typically broken into three standard segments:

- ❑ **Phase One** includes pre-campaign planning activities, prospectus development, Board recruitment and/or training.
- ❑ **Phase Two** includes a customized philanthropic market study, the development and conducting of interviews, analyzation of the data, and final presentation of the consulting group's findings with recommendations.
- ❑ **Phase Three** utilizes the expertise of a senior member of the consulting team as on-going Campaign Council. This takes place as the campaign begins and remains in the initial stages of fundraising. Costs for this phase are paid via administrative fees on gifts collected.

## SAMPLE ONE

	Cost	Projected Timeframe	Estimated Total Cost
Phase 1	\$2,550	1.5 Days per month @ 6 Months capped at 20k	\$20,000.00
Phase 2	\$29,900	4-6 Months at flat rate	\$29,950.00
Phase 3*	\$1,700	Average of 3 days per month for 18 months	\$91,800.00
Total Cost of Project:			\$141,750.00
<b>Total cost paid by Blueprint for Excellence:</b>			<b>\$49,950.00</b>

## SAMPLE TWO

	Cost	Projected Timeframe	Estimated Total Cost
Phase 1	\$8,088	7-8 days at a flat rate	\$8,088.00
Phase 2	\$29,900	Apx. 40 days of staff time at a flat rate	\$35,000.00
Phase 3*	\$5,000	Average of 1 day per month for 18 months	\$90,000.00
Total Cost of Project:			\$133,088.00
<b>Total cost paid by Blueprint for Excellence:</b>			<b>\$43,088.00</b>

## SAMPLE THREE

	Cost	Projected Timeframe	Estimated Total Cost
Phase 1	\$22,200	Apx. 4 months at a flat rate	\$22,200.00
Phase 2	\$0	Included as part of Phase 1	\$35,000.00
Phase 3*	Sliding	Sliding scale based on number of dollars raised	\$133,200.00
Total Cost of Project:			\$190,400.00
<b>Total cost paid by Blueprint for Excellence:</b>			<b>\$57,200.00</b>

\*Costs for Phase Three will be charged as administrative fees once the campaign has been initiated.

*Estimated costs do not include the consultant's travel, lodging or other coincidental expenses.*

Typical activities for Phase 1 include: pre-campaign planning activities, prospectus development, Board recruitment and/or training, etc.

Typical activities for Phase 2 include: philanthropic market study, development of interview guide, conducting of interviews, analyzing the data, draft and final presentation of full report with recommendations.

Typical activities for Phase 3 include: Senior level member of the Consulting Group to remain as Campaign Counsel. \*Costs for this phase will be charged as administrative fees once the campaign has been initiated.

## V. Draft Timeline

With a targeted 10% increase in the number of incoming freshmen, higher tuition costs, a sorely outdated library, and many other needs, it is imperative that immediate steps are taken to launch a university-wide capital campaign. To reflect the urgent nature of EOU's financial needs, University Advancement proposes the following timeline:

Winter 2006	Blueprint proposal <i>Development of a Campus-wide Capital Campaign Model</i> is recommended to the President
Winter 2006	RFP's are released to prospective consulting firms
Spring 2006	RFP's are received and reviewed by the University, the EOU Foundation, University Leadership and internal Capital Campaign Team.
Summer 2006	RFP is awarded and Phase 1 activities begin.  (Typical activities for Phase 1 include: pre-campaign planning activities, prospectus development, Board recruitment and/or training, etc.)
Late Fall 2006	Phase 2 activities begin  (Typical activities for Phase 2 include: philanthropic market study, development of interview guide, conducting of interviews, analyzing the data, draft and final presentation of full report with recommendations.)
Spring 2007	Results of Phase 1 and 2 are presented to the University and efforts are made to launch campaign with the beginning of the upcoming academic year.
Fall 2007	Launch of the University's Capital Campaign / Phase 3 begins

## **VI. Summary**

Initial conversations with community leaders, alumni, and donors indicate high levels of interest in a capital campaign to address the multiple, critical needs of the University. Beyond these grass roots discussions, more specific examinations need to take place to ensure the University's success in this highly public endeavor. As an important resource in this ambitious project, the team of consultants will help propel the campaign team, lead by the Office of Advancement, into EOU's next chapter of success.

Providing seed money for this project allows the campaign team to craft a specific fund-raising model that will be utilized throughout EOU for multiple years and guarantee a high return on the University's investment.

Other benefits of a formalized, comprehensive capital campaign include:

- ❑ An established timeline with clearly identified goals, benchmarks of success and an end date.
- ❑ Prioritization of critical needs and ambitious new goals (let's think big!).
- ❑ A newly generated excitement around a shared vision.
- ❑ The alignment of fundraising activities with EOU's strategic and master plans.
- ❑ Further unification of University goals and public image.
- ❑ Increased sustainability, resource diversification and community involvement.