



Zion Lutheran Church Building Project Update

Taskforce Members

- Joey Rotert
- Karl Liester
- Jordan Qualm
- Chad Hanisch
- Justin VanDeBerg
- Ron Nelson
- Sam Williamson
- Cheryl Scholl



Lisa Romkema
CONSULTANT



✉ lisa@maximizingexcellence.org
🌐 maximizingexcellence.org
📱 @LisaRomkema

☎ 605.271.9970 (office)
605.661.0910 (cell)

Background

- Original Project = Elevator focused
 - Elevator upgrade triggered improvements to stairs/entryway
 - \$1.2 million
- Cost/Alternatives
 - Cleveringa alternative eliminated stairs and included new fellowship hall
 - \$1.8 million



Feasibility Phase

- *Assessment of the practicality of a proposed project by using what we currently know as well as information collected to best gauge the success of the project.*
- **Primary Objectives of the study?**
 - Determine project feasibility.
 - Educate study participants about the project and its intended impact.
 - Surface high-level themes, key motivators and hesitations, and special discoveries.
 - Develop recommendations based upon findings and feasibility best practices to position the campaign for success.



Feasibility Phase

- **Process Overview**
 - MaxEx lead collaboration meetings with the Taskforce
 - Develop the campaign case for support
 - Provide input on interview questions
 - Survey development
 - Prioritize invitations
 - Perform interviews



Feasibility Phase

- Data collection / Sample size
 - Online congregation survey sent to 250 contacts. Paper surveys also
 - 84 responses
 - 37 in-person, video, or phone feasibility interviews
 - 18 couples
 - 19 individuals
 - Data analysis and report development



Key Insights

- Active and engaged congregation who value traditions.
 - Participants across surveys/interviews spoke highly of their experiences at Zion.
 - Lots of participation
 - Connection between tradition and fellowship
 - Zion recognizes growth in recent years and sees a need to provide space for the future



Key Insights

- Project would meet a need.
 - Additional details requested
 - Some questions on the full scope of work necessary and would like greater detail to understand value and long-term impact.
- Motivated by creating a space that is welcoming for old and new members.
- Feasibility of full scope would increase if the full scope of work was better understood



Key Insights

- Mixed sentiment on whether \$1.8 budget and gifting levels are possible.
 - Possibly more feasible if there are creative gifting options available.
 - Stock gifts
 - Gifts-of-Grain
 - Life Insurance Beneficiary
 - Direct distributions from tax deferred retirement accounts
 - Interest in reducing costs through in-kind donations of time/talent/materials/local subcontracting



Feasibility Outcome

- Zion can successfully raise \$900,000 if the following are considered:
 - Decrease goal to \$900k with a stretch goal identified.
 - Use of full building fund dollars
 - Explore alternative strategies to fund full amount after further review of project scope
 - Implement full recommendations



Financial Review

Zion Lutheran Building Project	
Original Estimated Cost (Cleveringa Bid):	\$ 1,500,000
Additional Costs - Not in Bid	
Parking lot, Demolition, Landscaping, Fill Dirt	\$ 300,000
Total Project Estimate and Campaign Goal:	\$ 1,800,000
Possible Cost Reductions:	
Canopy	\$ (50,000)
Lower Building Elevation 16"	\$ (15,000)
In-Kind Labor/Material Options	\$ (58,000)
Modify Ceiling	\$ (2,500)
Total Reductions:	\$ (125,500)
New Project Total	\$ 1,674,500
Feasibility Study	\$ 900,000
Building Fund	\$ 200,000
Balance	\$ 574,500

Loan Review		
Balance	\$ 574,500	
15 Years @ 6%	\$ 58,200	yearly
Insurance	\$ 6,500	yearly
Heating/Cooling	\$ 6,000	yearly
Adjusted Yearly Balance	\$ 70,700	yearly
2024 Budget	\$ 67,000	yearly
Reserve funds for unknowns	\$ (15,000)	yearly
Available Budget	\$ 52,000	yearly
Difference	\$ 18,700	yearly
6% Increase in annual giving (above the normal 3-5%)	\$ 18,700	yearly

Recommendations:

- Messaging – Action Steps:
 - Provide additional information for the following:
 - Accessibility
 - Fellowship Hall
 - Children and Youth Spaces
 - Exterior Improvements
 - Provide additional financial information:
 - Scope of work and comprehensive costs details
 - Cost comparison for phased project approach versus full project



Recommendations:

- Communication – Action Steps:
 - Report feasibility findings:
 - Incorporate findings on what congregation wants to know and how they prefer the information to be presented.
 - Create a FAQ document
 - Share consistent progress updates weekly throughout planning, fundraising, and construction



Recommendations:

- Fundraising Readiness and Strategy –

Action Steps:

- Decrease necessary funding
- Use existing building fund
- Evaluate and clearly communicate all options for funding
 - Bank loan
 - Gifts of Stock
 - Gifts of Grain
 - Multiple year pledges
 - Life insurance beneficiary
 - Distributions from tax deferred retirement accounts
- Evaluate annual giving plan



March 2024

Dear Pastor Corey Scott and Zion Lutheran Church Leadership,

Maximizing Excellence, LLC (MaxEx) partners with people and organizations that want to improve their effectiveness and achieve high impact. We appreciated the opportunity to lead your capital campaign feasibility study and are honored to submit a proposal to be your campaign readiness consultant as you continue toward this exciting vision.

As Zion Lutheran Church (Zion) prepares itself for a capital campaign, MaxEx is prepared to provide our expertise to implement suggested readiness activities and offer additional strategic counsel as needed.

From MaxEx you can expect:

- Strategic insight with planning, content, implementation, and people.
- Persuasive messaging built from donor motivators.
- Collaborative facilitation that leads to efficient and thoughtful decision making.
- Organized campaign readiness management that prioritizes communication, fund development strategy, aligning project components with donor priorities, and responsiveness to volunteers and staff.
- Oversight of all functions and phases related to capital campaign readiness.

MaxEx is prepared to equip the organization for capital campaign success. We will coordinate the integration of feasibility study findings, campaign readiness, and review of major donor potential. Our objective is not just preparing you to launch a successful capital campaign but positioning Zion Lutheran Church for success in achieving fund development and long-term sustainability goals.

Following this letter, you will find an overview of our capital readiness services, bios of key staff, a draft timeline, and a summary of pricing.

Thank you again for this opportunity for continued partnership.



Cindy Peterson
Founder & CEO



Lisa Romkema
Consultant

ZION CAMPAIGN READINESS

Maximizing Excellence, LLC can support campaign readiness at any involvement level desired. This includes implementing suggestions and activities as identified in the feasibility study, building a communications strategy, and overseeing how recommendations are incorporated.

MaxEx proposes to provide Zion Lutheran Church the following campaign readiness services, as well as support and management of implementing recommendations in response to feasibility study findings found on pages 21-24 of the feasibility study report.

Strategic Insight

- Review and advise on current project plan, strategizing how scope specific to fundraising fits into overall vision.
- Develop campaign readiness strategies that align with feasibility study findings and recommendations.
- Determine role of leadership and staff to ensure maximum commitment and influence, with consideration of time available.
- Assist in identifying campaign chair(s) and prepare them for their role.
- Analyze various target audience opportunities, motivators, and ask strategies.
- Facilitate development and evolution of solicitation list(s) and determining giving capacity.
- Conduct any requested prospect research on potential lead donors.
- Analyze campaign readiness progress/success ongoing.
- Consult, mentor, and problem-solve ongoing.

Communications

- Build a comprehensive education and communications strategy.
- Draft messaging for various communication outlets as needed.
- Ensure feasibility study motivators are incorporated into strategies and messaging.
- Incorporate updates made to materials as suggested in feasibility study findings and approved by church leadership and staff.
- Consult on needed renderings/visuals to be developed.
- Recommendations and strategy on talking points and other communication resources.
- Advise on where and how to incorporate campaign readiness into existing events and communications.
- Prepare church staff and leadership with talking points and FAQs.
- Prompt opportunities for pre-solicitation education opportunities with congregation.
- Initiate ongoing discussions/messaging strategies with leadership.

ZION CAMPAIGN READINESS

Readiness Management

Depending on the activity, MaxEx would lead, oversee, or consult on the following:

- Affirm internal staff resources and time commitment.
- Facilitate approval of final project plan, costs, and campaign goal by church leadership.
- Create and facilitate a multi-tiered readiness timeline. Adapt where/when needed.
- Coordinate meeting and communication structure.
- Facilitate campaign readiness status meetings with staff and volunteer leadership.
- Track where and how feasibility study recommendations are incorporated.
- Provide guidance to equip leadership and volunteers for success throughout campaign readiness.
- Draft agendas, slide decks, and other planning tools/documents.

In addition to the summarized responsibilities, MaxEx is committed to active involvement in the specific recommendations as shared in feasibility study findings as listed below. This is intended to be a comprehensive and collaborative partnership, with additional needs to be addressed as they arise throughout the readiness process.

ZION LUTHERAN CHURCH INVESTMENT

\$6,500 per month from May 1, 2024 – August 31, 2024.

- The inclusive rate includes all necessary services for campaign readiness as noted in the accompanying scope of work, and response to feasibility study recommendations.
- Zion Lutheran Church will reimburse MaxEx each month at \$.06 per black & white copy and \$.10 per color copy and mileage at the federal rate per mile.
- Expenses directly attributable to Zion will be paid by Zion or reimbursed monthly.

By investing in campaign readiness services, Zion will have the option to extend its partnership with MaxEx an additional 4 months (September 1, 2024 – December 31, 2024) for capital campaign services at the same monthly investment rate compared to MaxEx's traditional capital campaign services which currently range between \$8,200-\$9,850 monthly.

PROPOSED TIMELINE | MAY 2024 – AUGUST 2024

Campaign Readiness Prep [April 2024]

MaxEx will provide Zion with a list of items needed by April 15, 2024, in preparation for campaign readiness services to begin.

May 2024

- Review feasibility study recommendations and determine priority action steps.
- Present readiness timeline.
- Review scope of work key areas for expanded communication.
- Visual representations (renderings, blueprint plans, etc) to support communication.
- Prepare FAQ document.
- Determine congregation town hall meeting schedule and communication timeline.
- Review of current donor information.

June 2024

- Strategize communication with key stakeholders, study participants, and potential donors.
- Task Force committee meeting to discuss major donor outreach plan.
- Upload key information (renderings, FAQ, etc.) to church website page dedicated to project information sharing and campaign updates.
- Congregation Town Hall meetings/building tours.

July 2024

- Connect with potential lead donors.
- Evaluate health of current annual giving program and stewardship activities.
- Secure commitment from Zion leadership teams (prior to campaign status announcement).
- Congregation Town Hall meetings/building tours.

August 2024

- Review and approval of suggested gift matrix updates.
- Review current lead donor commitment and potential.
- Campaign status announcement to congregation.

Ongoing Throughout Readiness Process

- Congregation communication through varied appropriate channels.
- Zion Task Force/Leadership meetings and status updates.

This timeline provides a structured approach to achieve campaign readiness and is dependent upon Zion's ability to provide information and/or schedule meetings during the recommended timeframe. Adjustments can be made as needed based on progress and feedback received throughout the process.

ABOUT MAXEX

Our Purpose: Maximizing Excellence, LLC partners with organizations that want to improve their effectiveness and achieve high impact.

We are Mission Driven:

- To empower change that leads to success.
- To provide solutions using a strengths-based approach.
- To bring clarity to complex challenges.

We Value:

- Superior performance.
- High energy.
- Enduring partnerships.
- Creative problem solving.
- Customized approach.

Our Services:

- Capital campaign development and management.
- Strategic planning.
- Messaging development.
- Feasibility studies.
- Needs assessments.
- Meeting and group facilitation.
- Board and staff trainings.
- Customized research projects.

With MaxEx as your partner, you are assured the expertise, experience, and process that leads to success. As of proposal submission, MaxEx has reached and/or exceeded the campaign goal for every fundraising client since the company's inception.

Your project also benefits from our broad understanding of South Dakota's philanthropic landscape, particularly of Sioux Falls, which is evident in our completion of the first ever study of Sioux Falls' philanthropic climate and culture.

Contact Information:

101 N Main Ave #310 | Sioux Falls, South Dakota | 57104
(605) 271-9970 | maximizingexcellence.org

MEET the TEAM

Driven by her passion for making a difference, **Cindy Peterson**, MSW, CFRE, has dedicated her twenty-four-year career to positively impacting the lives of those she has never met.

In 2010, Cindy founded Maximizing Excellence, LLC, a consulting firm that helps organizations realize their full potential. By leveraging her proven fundraising tools and methodologies, she helps these organizations with efficient resource development and nonprofit capacity building, allowing them to improve their effectiveness and achieve high results. Through Cindy’s vision, she and her team have led well over 150 organizations to fulfill their mission and increase their impact.

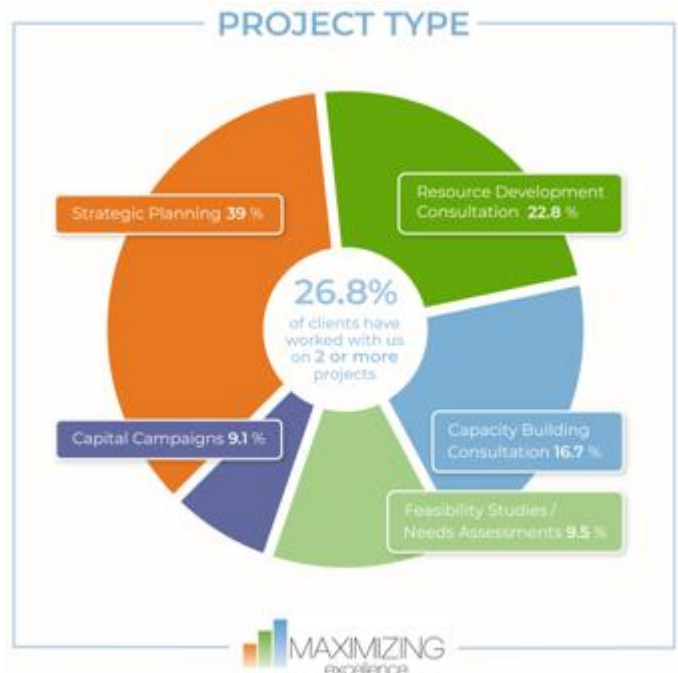
Passionate about the multiplier affect her work can have, Cindy finds herself drawn to organizations focused on quality of life, human services, and economic development, where her work can have the most significant impact in the shortest amount of time.

Recently Cindy and her team completed the first ever study of Sioux Falls’ philanthropic climate. You can read the study here: <https://maximizingexcellence.org/state-of-philanthropy/>

In addition to being a Certified Fund-Raising Executive (CFRE), Cindy has a certification in Capital Campaign Fundraising through the Institute on Charitable Giving as well as a Master of Social Work degree from the University of Nebraska-Omaha. Knowing the importance of efficient decision-making, she is trained a Thrive facilitator and is a certified co-starters facilitator.

In 2020, Prairie Business magazine selected Cindy as one of their Top 25 Women in Business. Her achievements, along with her creative problem solving and a never-quit attitude, have allowed Cindy to modernize the science behind the services her team provides.

Her direct, often bold approach combined with her unique ability to unite people with a common goal, has not only earned Cindy a reputation as the “go-to” for fundraising in eastern South Dakota but as a thought leader and sought-after presenter in her field. If you ask Cindy what drives her continued success, her answer is simple: She gets up every day to change lives.



Cindy’s Strengths: Activator. Strategic. Maximizer. Command. Ideation.

MEET THE TEAM

Lisa Romkema joined the team in 2023. Prior to MaxEx, Lisa spent nearly thirteen years in fundraising and nonprofit leadership. Her expertise is vast and she has had tremendous success with annual giving campaigns, capital campaigns, major giving, and planned giving for various mission-driven organizations of all sizes.

Born and raised in South Dakota, Lisa graduated from Dakota State University with a degree in business administration and marketing.

Lisa is incredibly passionate about philanthropy and the role it plays in the success of a community. Her relationship-first approach with donors and organizations has helped her build connections throughout the region and to help build long-lasting partnerships of both her own and those she works with.

Lisa's Strengths: Woo. Communication. Positivity. Individualization. Activator.

Next Steps?

- Congregation to digest information and provide input
- Proceed?
- Don't proceed?
- Approve MaxEx contract?
 - Find equivalent Lead















The background features a light grey gradient. On the left, there is a solid reddish-brown shape. On the right, there is a large, muted olive-green shape. In the top left corner, there are faint, grey line-art drawings of leaves and branches. A thin, white, wavy line is visible on the right side, partially overlapping the green shape.

thank you