



EAB

# Right-Sizing Your Campaign for Today's Fundraising Environment

Advancement Leader Workshop Series  
Session #1 February 20<sup>th</sup>, 2025

Independent School Executive Forum

# Meet Your Research Team



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# Advancement Leaders Workshop Series



## Right-Sizing Your Campaign for Today's Fundraising Environment

1

Reflect on Today's  
Fundraising  
Landscape

February 20<sup>th</sup> 2025

Examine today's fundraising landscape, reflect on key challenges, assess current efforts to find areas for improvement, and preview actionable steps for future campaigns

2

Scope Campaigns  
To Prevent Burnout  
and Enhance  
Engagement

March 27<sup>th</sup> 2025

Explore how to adjust campaign structures to address staff and donor fatigue and connect campaigns to the mission and impact donors want to see, ensuring sustained momentum in your fundraising efforts

3

Leverage  
Relationships and  
Big Ideas for  
Campaign Success

April 24<sup>th</sup> 2025

Develop strategies for strengthening and increasing collaboration between campaign teams, board members, and faculty to source compelling ideas that engage donors and help to differentiate your value proposition

*More details and information to come. Reach out to your dedicated advisor with any questions.*

# Objectives & Agenda for Today



Overview the state of campaigning in independent schools

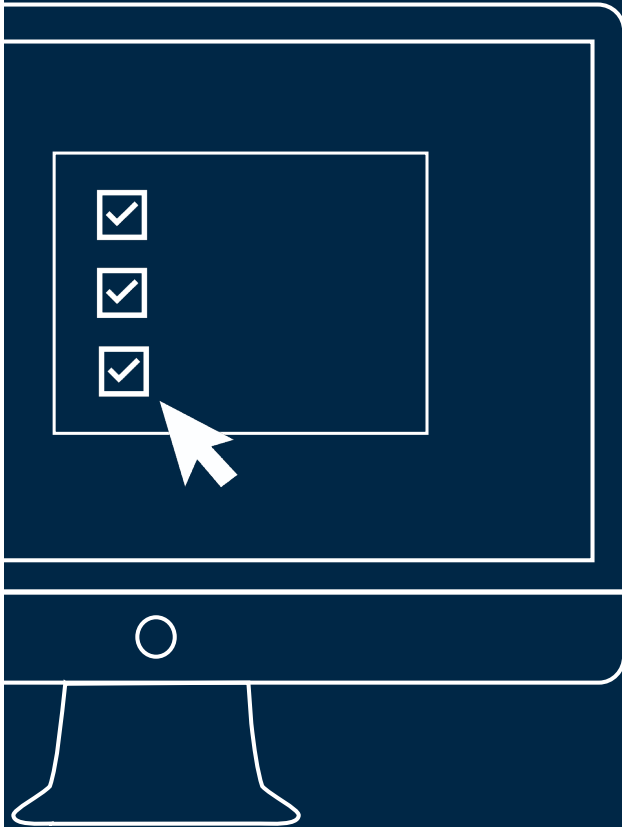


Learn three key challenges that current campaign playbook causes and preview strategies for improvement



Reflect on current practices to find areas of focus for the next two sessions

## Respond in the Zoom Poll:



In what stage of a campaign is your school?

- Not currently in campaign
- Planning phase before launching campaign
- Leadership/quiet phase
- Public phase

If you are currently in a campaign, for what are you fundraising? (select all that apply)

- Capital project
- Endowment
- Major Gifts & Special Initiatives
- Annual Fund
- Other:

# Considering Launching a Campaign?



## Tools to Support Conversations

### Team Discussion Guide *Assessing School Campaign Need*

### Donor Discussion Guide *Assessing Campaign Feasibility*

#### Assessing School Need for a Campaign

Discussion Guide

##### Instructions

1. Distribute the list of questions below to leaders who will decide whether planning and executing a campaign will help the institution meet its goals.
2. Schedule a time to discuss the questions below and come to a consensus about whether a campaign is necessary to meet the school's goals.

##### Discussion Questions



##### Mission, Goals, and Initiatives

- What is the school's mission? Could a campaign help accomplish that mission in ways the school can't currently accomplish?
- Are there new initiatives that school leaders want to undertake but lack the funds to do so?
- How many campaign priorities would be needed? Are there enough priorities for a comprehensive campaign or a mini-campaign?



##### Internal Readiness

- Does the school have sufficient funds to execute a campaign?
- Is advancement appropriately staffed to execute a campaign?
- Are academic and program partners prepared to support campaign efforts?
- Are school leaders prepared to support campaign efforts?



##### Reflecting on the Last Campaign

- Have the funds from the last campaign been transformative for the school?
- Are top donors still paying off pledges from the last campaign?
- Have funds from the last campaign created significant budget drag?
- Are there other lessons learned from the last campaign?

#### Feasibility Interview Discussion Questions

Questions to Use with Trusted Donors

##### Discussion Questions

Consider having self-led feasibility conversations with trusted donors to conserve funds and to begin the fundraising conversation. Use the questions below as a starting place.



##### Feedback

- Have you been able to meet current school leadership? Do you believe in the school's current leaders?
- Have you had a chance to review our strategic plan? Do you support our current strategic plan? We'd be grateful for any feedback you can provide.
- What programs or areas do you feel most passionately about?



##### Personal Passions

- What priorities do you care about the most? Are there any you find compelling that are not on the current strategic plan?
- We value your feedback and expertise. How would you like to be involved in future initiatives?
- What vision do you have for this institution or the broader community that you believe we can help achieve but may not be in the strategic plan?
- Are there others who share your passions for [insert initiative] that you recommend we connect with?



##### Further Involvement

- Would you be willing to share how our school fits in with your other philanthropic priorities?
- Would you be interested and willing to serve in a leadership capacity for this campaign or specific initiative?
- Can you share a little bit about how you may be able to support these initiatives or efforts philanthropically?

# The Era of Good Feelings (About Fundraising)



## Independent Schools Reap the Benefits of Increased Giving to Education

**+11%**

Increase in giving to education in 2023-24, 6.7% adjusted for inflation

**+6%**

Increase in median funds received by independent schools, totaling \$1.51M

**+2.5%**

Increase in median total donors at independent schools

**87%**

Of heads said that fundraising was a very important cost lever to address sustainability

## Heads<sup>1</sup> See Opportunities To Continue This Success

*I believe the biggest opportunity for my school in the next 3-5 years is...*

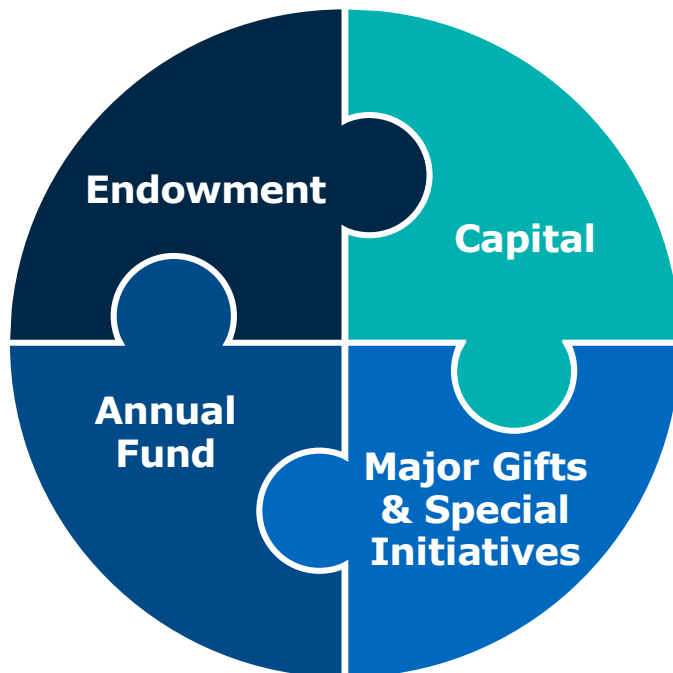
- ▶ "... advancement"
- ▶ "... cultivating donor potential in a capital project"
- ▶ "... expanding the young donor base"
- ▶ "... shifting from a focus on capital projects to a more balanced set of philanthropic objectives"
- ▶ "... trying to grow endowment"

# Campaigns Effective for Comprehensive Fundraising

77.8%

Increase in the proportion of independent schools in campaign mode between 2018-2022

## Comprehensive Campaigns Address Multiple Needs at Once



## Benefits of Comprehensive Campaigns

Addresses and adapts to **multiple priorities in a single campaign**

Appeals to a **more diverse range of donor interests**, maximizing engagement

Signals **school mission and vision** to current and prospective families



# Campaigns Used To Be Finite, Focused, & Infrequent

## Yesterday's Campaigns Operated in a Different Fundraising Environment



Campaigns capped by achieving **dollar goal as a focus**



Projects focused on concrete needs of schools **leading to more transactional giving**



**Less fundraising competition** in the market for donor dollars



**Infrequent use** made campaigns stand out as distinct

### Timeline of Yesterday's Campaign

*Identify needs on campus, test goals*



Year 0

*Private campaigning, top of the pyramid gifts solicited from key donors until 1/2 of goal raised*



Year 4

*Public phase to meet remainder of goal from smaller donors*



Year 8

*Goal reached, campaign concludes and wraps up*



*Complete new strategic plan*



10 Year Break



Year 0

*Start over with a new campaign*



“

“Even if schools are not publicly in a campaign, they are effectively in the silent phase. **I haven't heard any colleague mention taking a break between campaigns anymore.** Before one ends, they are already thinking about the next.”

*Director of Advancement*

”



## Characteristics of This “New Era” of Campaigns



### Broad Initiatives

Catch-all buckets increase usability of dollars for varying school initiatives



### Rising Campaign Goals

Dollar goals grow higher due to increased expectations



### Extended Timelines

Campaign timelines extend beyond initial plans



### Few Breaks

All-hands-on-deck, all the time, for campaign team

# Three Pain Points Arise in New Era of Campaigning



## Three Common Campaign Strategies...



### Frequent and Overlapping Efforts

*"We are always thinking about the next campaign before the current one ends."*



### Heavy Reliance on Dollar Goals

*"Announcing a campaign is like giving a donor a multi-million-dollar bill for the things we need."*



### Heads As Fundraiser-in-Chief

*"Every top donor wants to make sure they have time with the head to discuss their priorities."*

## ...Lead to Pain Points in Today's Campaign Environment

### Staff and Donor Burnout

*"We exhaust our staff and our donors to reach campaign goal."*

### Donor Preferences Shift Towards Impact

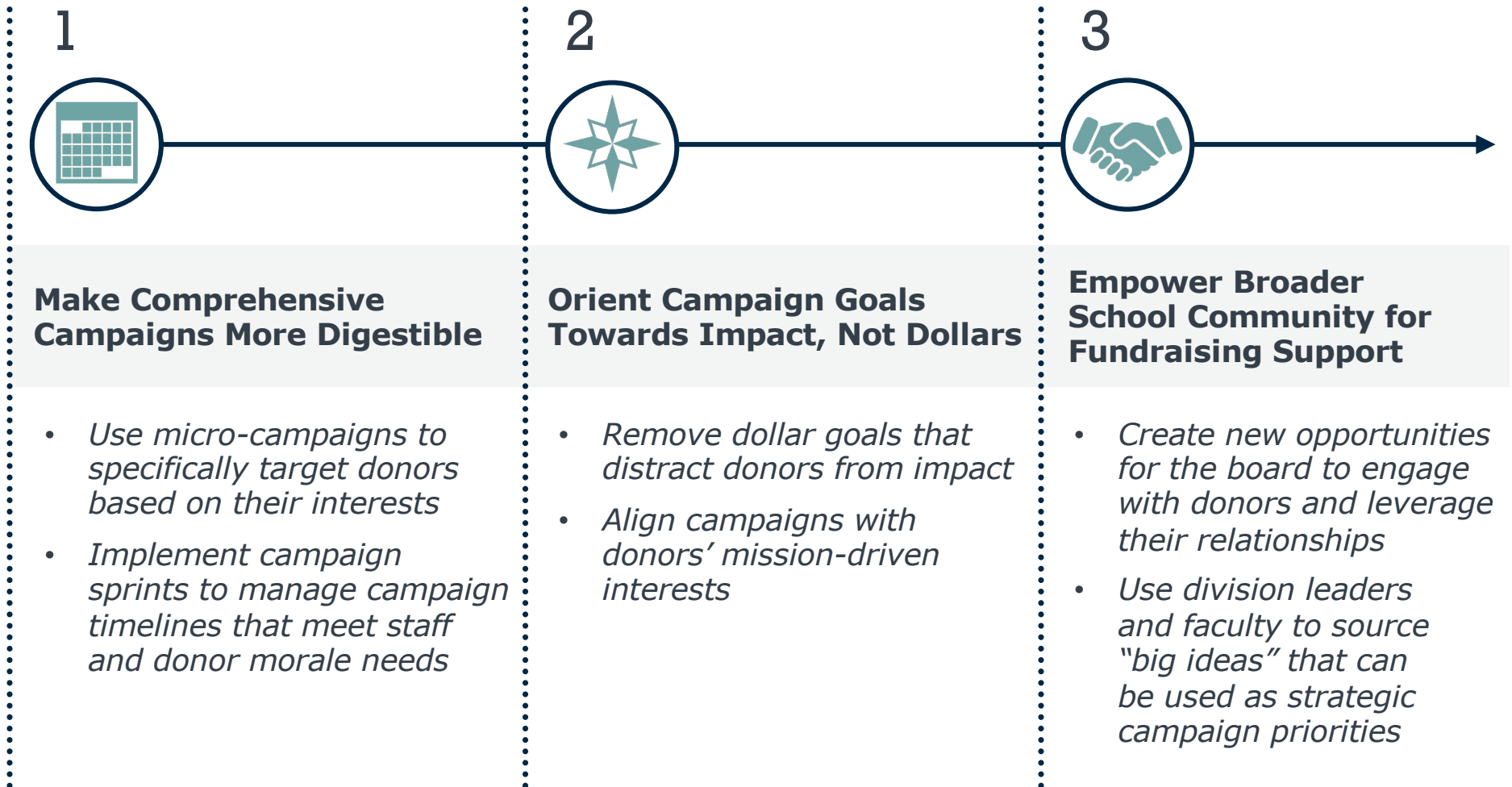
*"Donors want to give to initiatives they are passionate about, but doesn't always align with our school priorities."*

### Untapped Potential of On-the-Ground Staff

*"We miss opportunities to better engage school leaders to support campaign effectively."*

# Right-Size Campaign Strategies To Sustain Future Growth <sup>12</sup>

## Three Steps Towards Reinventing Campaign Strategies for Today



## Advancement Shops Report Hidden Costs of Continuous Campaigns



“**My staff** has been in **campaign mode for the last 7 years**. But we won’t get a break because we just updated our strategic plan”



“Our last campaign was successful because we had a full pipeline of donors, but now **those donors are tapped out.**”

### Staff-Related Risks of Forever Campaigns

- ❑ Long campaign cycles lead to staff exhaustion and turnover
- ❑ Staff turnover weakens donor relationships

### Donor-Related Risks of Forever Campaigns

- ❑ Larger, more frequent solicitations reduce donors’ ability to give
- ❑ Oversaturated campaign environment diminishes donor urgency and clarity

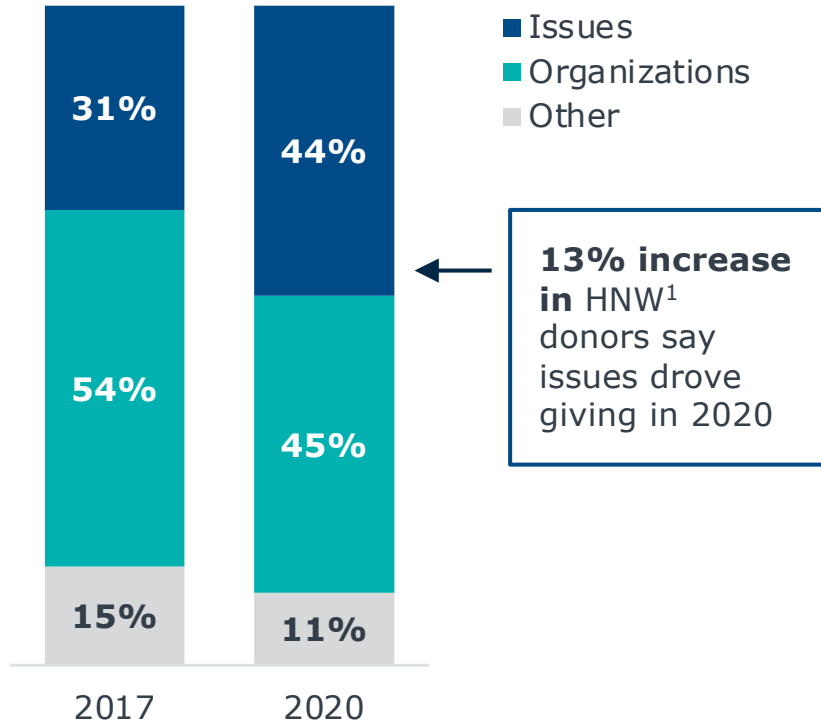
# Donors Motivated by Mission, Not Metrics



## Donors Don't Give To Meet Campaign Dollar Goals

### Top Donors Want Impact

Bank of America Study of Affluent Household Giving, 2021



### Current Efforts Fail To Convince Donors of True Impact

55%

Of HNW donors do not know if their giving has intended impact

81%

Of donors are concerned about transparency and understanding gift impact

65%

Of donors would give more if they better understood gift impact

1) High-net-worth

# As Fundraising Demands Grow, Untapped Community Support



## Heads' Commonly Identified Fundraising Challenges

- ✘ Time constraints
- ✘ Limited experience or training in fundraising
- ✘ Aligning fundraising goals with educational mission and vision
- ✘ Navigating donor expectations and balancing stakeholder interests

## But Many Additional Campaign Support Systems Are Underused

77%

Of schools report they lack an active board development or separate fundraising committee

“Faculty are often the ones who have the most creative ideas – they have a deep understanding of what student needs and can envision innovative ways to enhance the school, **but we don't always include them in the campaign planning.**”

*Head of School, Day School*



### Reduced Fundraising Impact

Schools miss opportunities to leverage board influence and ideas from division heads, faculty, and staff



### Leadership Burnout

Lack of board, division heads engagement in campaigns adds pressure on the head and smaller advancement team

# Right-Size Campaign Strategies To Sustain Future Growth <sup>16</sup>



## Session #2

March 27<sup>th</sup>, 2025

### Make Comprehensive Campaigns More Digestible

- *Use micro-campaigns to specifically target donors based on their interests*
- *Implement campaign sprints to manage campaign timelines that meet staff and donor morale needs*

### Orient Campaign Goals Towards Impact, Not Dollars

- *Remove dollar goals that distract donors from impact*
- *Align campaigns with donors' mission-driven interests*

## Session #3

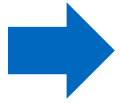
April 24<sup>th</sup>, 2025

### Empower Broader School Community for Fundraising Support

- *Create new opportunities for the board to engage with donors and leverage their relationships*
- *Use division leaders and faculty to source "big ideas" that can be used as strategic campaign priorities*



# Assessing Your Current Practice



Reflection Questions

## Preventing Staff and Donor Fatigue

**Instructions:** Use these questions to reflect on your current practice of preventing staff and donor fatigue during campaigns.

**Do we currently assess and manage the workload of our advancement team to prevent burnout?** Agree  Somewhat Agree

**Reflect on your response:**

**We have strategies in place to sustain donor engagement throughout a campaign, without overwhelming them?** Agree  Somewhat Agree

**Reflect on your response:**

**We consider the effectiveness of our campaign pacing and adjust improve donor and staff sustainability?** Agree  Somewhat Agree

**Reflect on your response:**

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Reflection Questions

## Aligning Campaign Goals with Donor Preferences

**Instructions:** Use these questions to reflect on your current practice of better aligning your campaign goals towards impact to meet donors' preferences.

**We understand the philanthropic interests of donors and adapt our campaign strategies accordingly.** Agree  Somewhat Agree  Disagree  Don't Know

**Reflect on your response:**

**We align the goals of campaigns with changing donor interests.** Agree  Somewhat Agree  Disagree  Don't Know

**Reflect on your response:**

**We have oriented campaign goals more directly towards impact instead of just dollar amounts.** Agree  Somewhat Agree  Disagree  Don't Know

**Reflect on your response:**

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Reflection Questions

## Empowering More School Leaders for Support

**Instructions:** Use these questions to reflect on your current practice of incorporating more school leaders such as the board and faculty to support fundraising efforts.

**Empower faculty and other school leaders to participate in various stages of fundraising leads and the campaign process.** Agree  Somewhat Agree  Disagree  Don't Know


**Reflect on your response:**

**Use division leaders and faculty to source and/or tools to non-advancement staff making participation easier?** Agree  Somewhat Agree  Disagree  Don't Know

**Reflect on your response:**

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 **Download today's workbook from the Zoom chat**

# Protected Work Time:

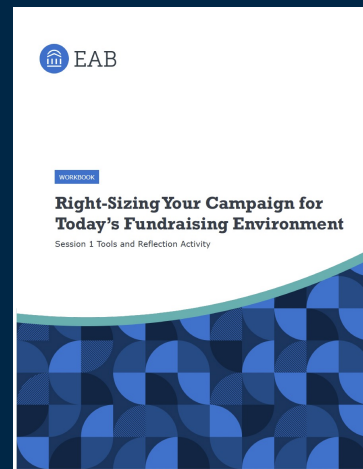
## Reflect on Your Current Campaign Practices

**Time: 10-15** minutes

### EAB Resources:

#### Session 1 Workbook

*Includes: Self-  
Reflection*



 This image shows a page from the workbook with the heading 'Preventing Staff and Donor Fatigue'. It contains three reflection questions, each with a Likert scale (Agree, Somewhat Agree, Disagree, Don't Know) and a text box for details. The questions are:
 

- 'We currently assess and manage the workload of our advancement team to prevent burnout.'
- 'We have strategies in place to sustain donor engagement throughout a campaign, without oversteering them.'
- 'We consider the effectiveness of our campaign pacing and adjust to improve donor and staff sustainability.'



Download today's workbook  
(PDF) from the Zoom chat

# Reflecting Campaign Practices

## Breakout Session

**Please accept your breakout room invitation**

Discussions will last for:



**10-15 minutes**

- ✓ Introduce yourselves
- ✓ Share one area within the reflection questions you feel your school is doing well and what strategies you are using to achieve that success.
- ✓ Share an area where you'd like to invest in more strategies to improve.



**Welcome back!**



Unmute or share in the chat  
**a key takeaway** from the  
discussion!

# Right-Size Campaign Strategies To Sustain Future Growth<sup>21</sup>



## Session #2

March 27<sup>th</sup>, 2025

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# Before you go...

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Please provide feedback on your overall experience in today's session.

## **Session 2 Reminder:**

- Thursday, March 27<sup>th</sup> at 1-2 PM ET