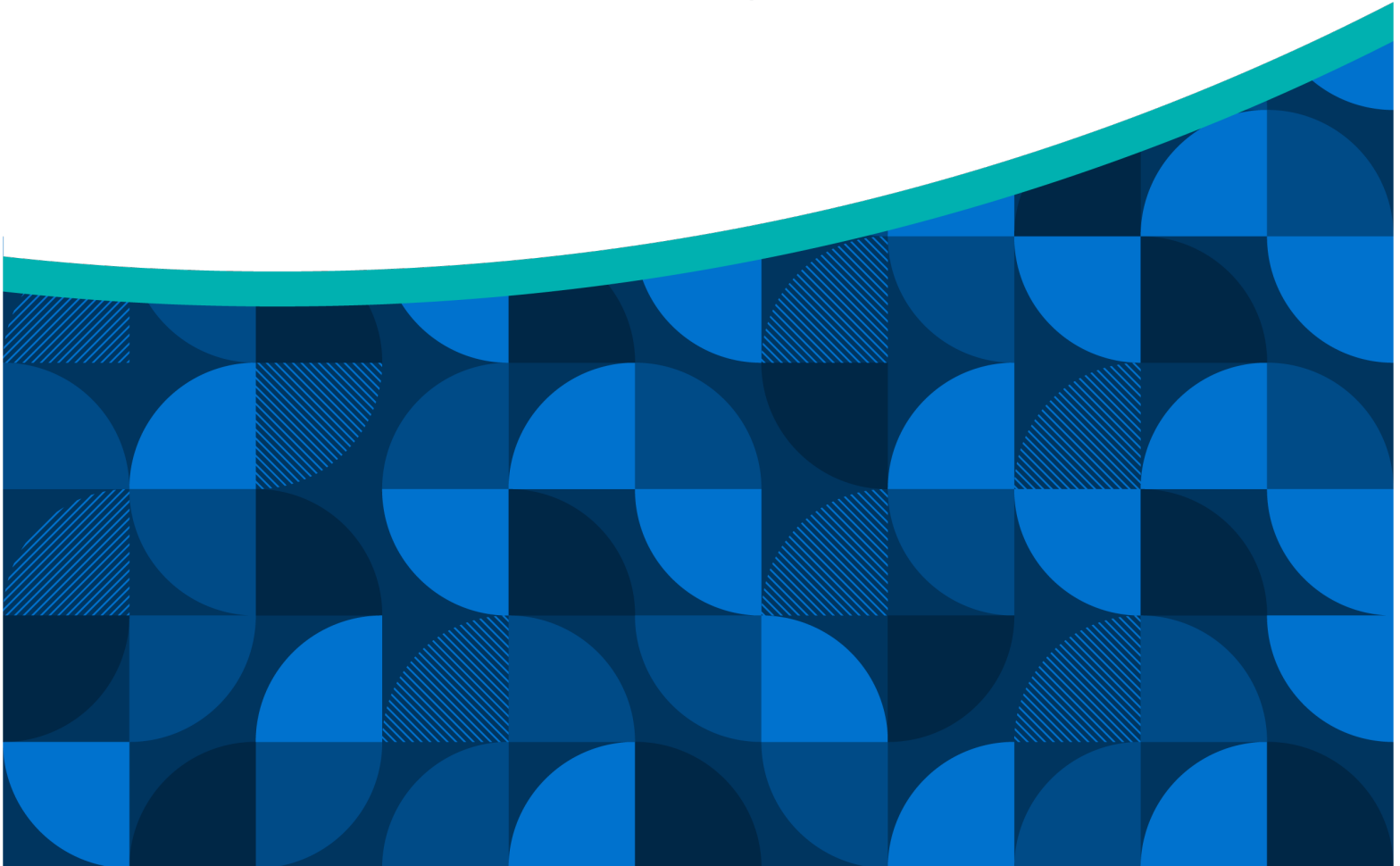




WORKBOOK

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

Session 1 Tools and Reflection Activity



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# Assessing School Need for a Campaign

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Use this as a discussion guide with school leaders when considering if your school should launch a campaign.

## Instructions

1. Distribute the list of questions below to leaders who will decide whether planning and executing a campaign will help the school 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

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Use this as a discussion guide with trusted donors when considering if your school should launch a campaign.

## 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 school 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?

## Preventing Staff and Donor Fatigue

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

**We currently assess and manage the workload of our advancement team to prevent burnout.**

Agree      Some-  
what  
Agree      Disagree      Don't  
Know

*Include details, examples, and/or rationale for your response here:*

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

Agree      Some-  
what  
Agree      Disagree      Don't  
Know

*Include details, examples, and/or rationale for your response here:*

**We consider the effectiveness of our campaign pacing and adjust to improve donor and staff sustainability.**

Agree      Some-  
what  
Agree      Disagree      Don't  
Know

*Include details, examples, and/or rationale for your response here:*

# Aligning Campaign Goals with Donor Preferences

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

**We understand the philanthropic interests of today's donors and adapt our campaign strategies accordingly.**

Agree      Some-  
what  
Agree      Disagree      Don't  
Know

*Include details, examples, and/or rationale for your response here:*

**We align the goals of our campaigns with today's donor interests.**

Agree      Some-  
what  
Agree      Disagree      Don't  
Know

*Include details, examples, and/or rationale for your response here:*

**We have oriented campaign goals more directly towards impact instead of just dollar amounts.**

Agree      Some-  
what  
Agree      Disagree      Don't  
Know

*Include details, examples, and/or rationale for your response here:*

## 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.

**We empower faculty and other school leaders to engage with the campaign process and fundraising opportunities.**

Agree

Some-  
what  
Agree

Disagree

Don't  
Know

*Include details, examples, and/or rationale for your response here:*

**Board members participate in various stages of fundraising and the campaign process.**

Agree

Some-  
what  
Agree

Disagree

Don't  
Know

*Include details, examples, and/or rationale for your response here:*

**We offer support (e.g., training, tools) to non-advancement staff to make fundraising participation easier.**

Agree

Some-  
what  
Agree

Disagree

Don't  
Know

*Include details, examples, and/or rationale for your response here:*