



The Next Era of Campaign Strategy

Right-Sizing Campaign Strategies for Future Success

Independent School Executive Forum

Meet Your Research Team



Jen Slavick

Director

JSlavick@eab.com



Gav Rubenstein

Associate Director

GRubenstein@eab.com



Olivia Rios

Director

ORios@eab.com



Molly O'Connor

Managing Director

MOConnor@eab.com



Jake Nelson

Senior Analyst

JNelson@eab.com

Advancement Leaders Workshop Series



Right-Sizing Your Campaign for Today's Fundraising Environment

1

Reflect on Today's Fundraising Landscape

February 20th 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 27th 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 24th 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.

Agenda for Today



Learn campaign structures (e.g., micro-campaigns, sprints) to combat donor and staff fatigue



Understand why orienting campaign goals around impact over dollars will be more engaging for today's donors



Reflect on current practices and share ideas with colleagues from other schools

Make Comprehensive Campaigns More Digestible



Session #2

March 27th, 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 24th, 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*

Make Comprehensive Campaigns More Digestible



Session #2

March 27th, 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 24th, 2025

Empower Broader School Community for Fundraising Support

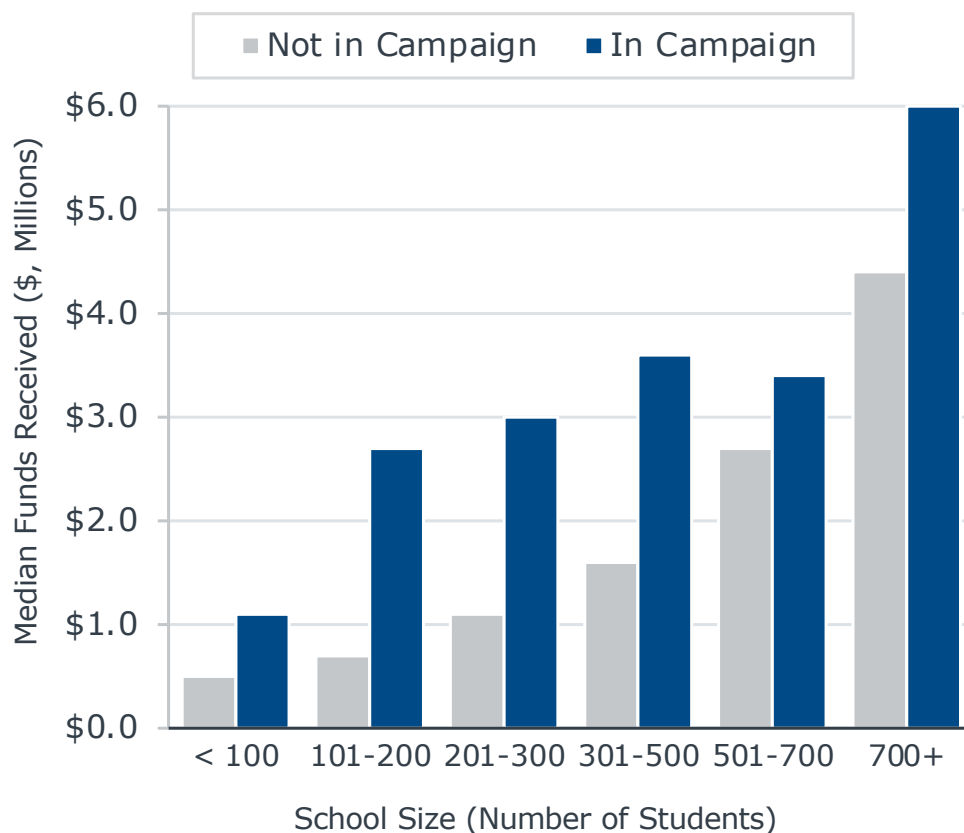
- *Create new opportunities for the board to engage with donors and leverage their relationships*
- *Use division leaders and faculty to source "big ideas" that can be used as strategic campaign priorities*

More Campaigns, Bigger Goals



Campaigns Lead to Increased Giving

Median Funds Received (in Millions USD) and Campaign Status by School Size, 2022¹



Schools Setting Ambitious Goals

\$40M

Median campaign goal among independent schools with 700+ students¹

50%

Of surveyed² EAB independent school partners reported a campaign goal of over \$25M

1) CASE/NAIS, 2022, n= 520

2) n=16

Forever Campaigns Drain Staff and Donors



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

Micro-Campaigns Target Donors Based on Their Interests⁹

Scope Campaign Goals into Separate, Shorter, Campaigns

Micro-Campaigns Reduce Burnout



Short Timeline

A 2-3 year fundraising timeline



Tight Scope

Campaign focuses on one primary initiative



Focus on Impact

Goal is a specific and transparent need

Steering Donors Toward Interests Leads to Fewer Asks

Identified Donors with Interest in Sports



- Raised \$9M new academic programs, sports teams
- Timeline: 2020-2022
- Occurred during transition between major campaigns

Targeted Asks to Donors with Affinity for Research



Endowment Positions Created for Research Excellence

- Solidifying sustainability for their new R1 status
- Transition: presidential
- Goal: \$50M
- Timeline: 2020-2024

Using Micro-Campaigns To Meet Comprehensive Goals

10



Campaign Sprints Tackle Fundraising Priorities One at a Time



How It Works at the University of North Dakota's Decentralized Shop



Leadership Sets Key Institution Priority

E.g., capital project and endowed professorships



Central Staff and Relevant Unit 'Sprint'

E.g., marketing and finance partner with engineering leadership and fundraisers



Other Units Continue Routine Fundraising

E.g., athletics fundraises for small priorities

Using Micro-Campaigns and Sprints to Beat Fatigue

Questions for Reflection

- **If your school already uses micro-campaigns or sprints, how has it reduced donor and/or staff fatigue?**
- **If you have not yet used them, how could you incorporate them into your current campaign structure?**



Orient Campaign Goals Towards Impact, Not Dollars



Session #2

March 27th, 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 24th, 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*

Independent Schools Rely on High-Net-Worth¹ Donors₁₃

Schools Rely on a Handful of Donors for Most of Their Fundraising

Majority of **total dollar** donations from a **small group** of HNW donors



2.3%

Less than 2.3% of donors were responsible for 74.3% of total funds received in 2023

Majority of **total donors** have **minimal impact** on total fundraising



73.9%

Of donors gave less than \$1,000 which equaled only 3.3% of total funds

High—value major gifts **drive portion** of fundraising



27.8%

Of major gifts received were seven- and eight-figure gifts

“

*Before 80% of the money was from 20% of our top donors, but **this group feels even smaller today**. It's almost 90% money from 10% of people, and **we are very reliant on these top donors.***

-Head of School, West Coast, Day School

1) HNW

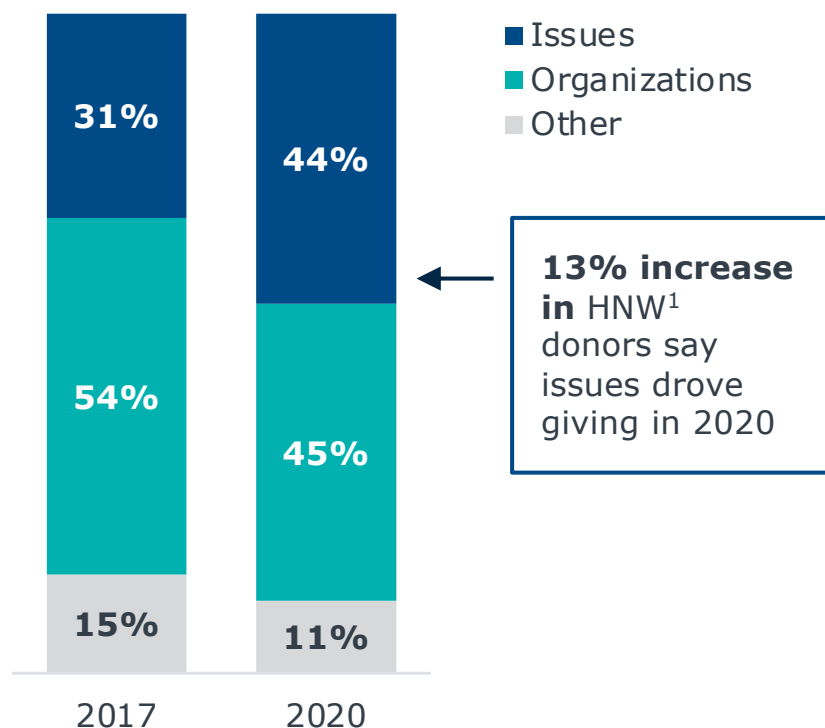
Donors Motivated by Mission, Not Metrics



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

Donors Define “Impact” Broadly



15

Donors Accept Many Indicators of Impact

Issue-Specific Impact



Of donors seek information about long-term benefits to society from addressing or resolving issues

Organization-Specific Impact



Of donors seek information about the impact of an organization

Overall issue size and scope



Specific issue subset addressed

All populations affected



Geographic area and population served

Innovative solutions developed



Projects to be funded through philanthropy

Showcasing Our True Intentions



Utah State's No-Dollar-Goal Campaign



Removing Structures That Distract From Impact

Devoid of...



Big goal announcement from president



Campaign logo and separate marketing



Dashboards showing progress towards big goal

Focuses on...



Goals tied to discrete impact initiatives but not total dollar figure



Communications focused on impact



Dashboards highlighting progress towards initiatives

Showcasing Our True Intentions



Utah State's No-Dollar-Goal Campaign



Removing Structures That Distract From Impact

Devoid of...



Big goal announcement from president



Campaign logo and separate marketing



Dashboards showing progress towards big goal

Focuses on...



Goals tied to discrete impact initiatives but not total dollar figure



Communications focused on impact



Dashboards highlighting progress towards initiatives



A Campaign That Focuses on Priorities

"We will keep targeting new priorities as they emerge. Without an overall campaign goal, we can adapt to current donor interests and college needs."

Matt White

Vice President of Advancement, Utah State University

Campaign Goal Discussion Guide Available



EAB

Setting a Campaign Dollar Goal

A Discussion and Preparation Guide

Instructions

Use the questions below to prepare for and discuss setting a campaign goal. After setting a dollar goal, discuss a realistic timeline to achieve that dollar goal.

Current Yearly Production

- What is the 3-year average for cash and pledges?
- What is the current expected value of gifts in the pipeline?

External Context

- What is the current economic outlook?
- Are any specific causes garnering significant philanthropic attention?



Staffing Capacity

- Are there many open positions that need to be filled?
- Do MGOs have existing donor relationships upon which to build?

Donor Capacity

- What does a wealth screening show about capacity?
- What does our historic donor data tell us about capacity?

©2022 by EAB. All Rights Reserved.



Discussion guide included
in today's workbook

Leading Campaigns with Impact

Questions for Today and Questions for Your Team

- **How could your school use dollar goals internally and focus on impact externally?**
- **If a current campaign already has an external dollar goal, how could your school add a focus on impact to the campaign strategy to attract more donors?**



Reflecting on Your Current Practice



Reflection Questions

Using Micro-Campaigns and Sprints to Beat Fatigue

Instructions: Use these questions to reflect on your current practice of using micro-campaigns and sprints to prevent staff and donor fatigue during campaigns.

Has your school already used micro-campaigns and/or campaign sprints?

Include details here :

If your school already uses micro-campaigns or sprints, how has it reduced donor and/or staff fatigue?

Include details here:

If you have not yet used them, how could you incorporate them into your current campaign structure?

Include details here:

©2022 by EAB. All Rights Reserved. 5 eab.com

Reflection Questions

Leading Campaigns with Impact

Instructions: Use these questions to reflect on how you could orient campaign goals more towards impact than dollars.

Has your school ever opted to set an external campaign goal around impact instead of dollars?

Include details here :

How could your school use dollar goals internally and focus on impact externally?

Include details here:

If a current campaign already has an external dollar goal, how could your school add a focus on impact to the campaign strategy to attract more donors?

Include details here"

©2022 by EAB. All Rights Reserved. 6 eab.com



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

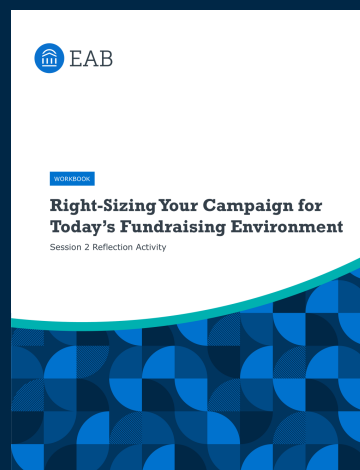
Protected Work Time:

Reflect on Your Current Campaign Practices

Time: 10-15 minutes

EAB Resources:

Session 2 Workbook



Includes: Self-Reflection

This image shows a sample page from the workbook, specifically a 'Reflection Questions' page. The title is 'Using Micro-Campaigns and Sprints to Beat Fatigue'. Below the title, there are instructions: 'Instructions: Use these questions to reflect on your current practice of using micro-campaigns and sprints to prevent staff and donor fatigue during campaigns.' There are three main questions, each followed by a large text box for answers: 1. 'Has your school already used micro-campaigns and/or campaign sprints? Include details here:' 2. 'If your school already uses micro-campaigns or sprints, how has it reduced donor and/or staff fatigue? Include details here:' 3. 'If you have not yet used them, how could you incorporate them into your current campaign structure? Include details here:'

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 ways your school is already using micro-campaigns and sprints and orienting campaign goals more towards impact.
- ✓ Share ways your school could better be employing these practices.



Joining Breakout Room...

Breakout Room 1

This may take a few moments

Welcome back!



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

Right-Size Campaign Strategies To Sustain Future Growth²⁴



Session #2

March 27th, 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 24th, 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*

Before you go...

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

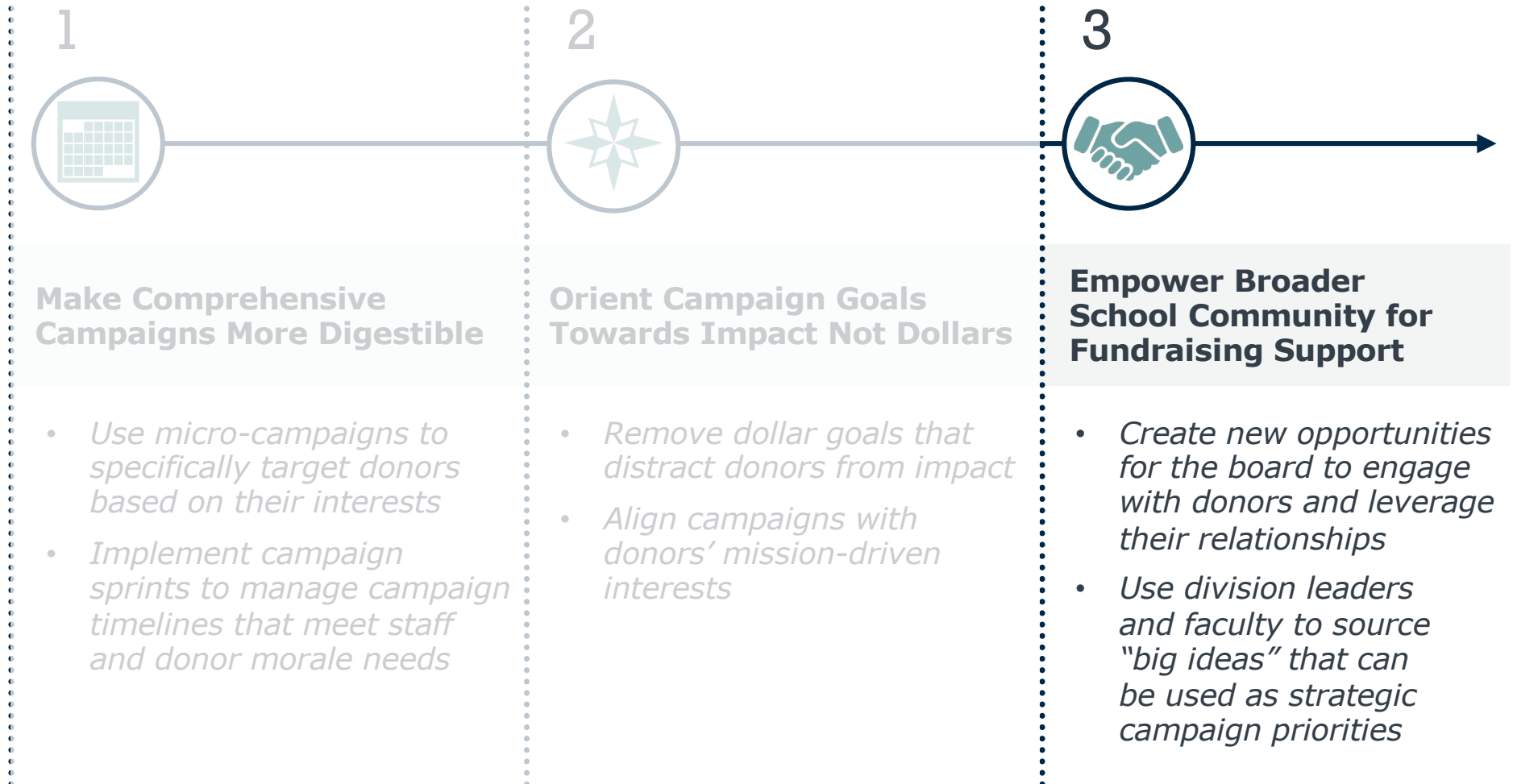
Session 3 Reminder:

- Thursday April 24th, 1-2 PM ET

Empower Broader School Community for Fundraising Support



Three Steps Towards Reinventing Campaign Strategies for Today



The Head Is Now Fundraiser-in-Chief



Fundraising Considerations and Responsibilities of Heads

- ✓ Lead vision and strategy
- ✓ Cultivate donor relationships and stewardships
- ✓ Build strong alumni connections
- ✓ Articulate the school's case for support
- ✓ Assess campaign efforts on the horizon
- ✓ Develop unique priorities for support
- ✓ Involve campus partners
- ✓ Anticipate shifting donor interests
- ✓ Receive board approval
- ✓ Retain current talent or hire staff

40-50%

Of heads' time dedicated to campaign activities during a campaign cycle¹

“ I estimate that I spend 45% of my time on our campaign right now, but if I **actually tracked my time, I know it would definitely be way more.** ”

Head of School, West Coast, Day School

1) Estimated by top independent school campaign consultants

As Fundraising Demands Grow, Untapped Community Support



28

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

Sources: CASE, [“How to Develop Your Head of School into a Great Fundraiser”](#), 2023; CCS Fundraising, [“Fundraising Considerations for Heads of School: Q&A with John Green”](#), 2023; NAIS, [“Four Key Findings from the 2021 State of Independent School Leadership Study”](#), 2021; SAIS, [“Fundraising Trends, -- How Does Your School Compare”](#), 2022; EAB interviews and analysis.

Boards Can Achieve Results Where Others Can't



Board Education Necessary To Address Common Roadblocks

Board Members Can Play a Critical Role in Campaigns

- 1 Initiating relationships with top prospects
- 2 Deepening and sustaining relationships
- 3 Soliciting large gifts

Top Reasons Board Members Don't Participate in Fundraising

- ✗ Misunderstand the prospect referral process
- ✗ Worry they may need to solicit friends or cold call
- ✗ Discount the relevance of their skills and influence outside of monetary donations

Discussion Question



What do you need your board to know about how your advancement shop operates and its role in your school's success?

Assess Board Member Comfort Level of Involvement



Prospect Referral Cards Make It Easy for Board Members To Say Yes

Prospect Referral Excerpt			
Your Name: _____		Prospect's Name: _____	
Residence (Summer): _____		(Winter): _____ (Other): _____	
Relationship: _____		Business: _____	
	Would You Be Willing To...	Yes	No Maybe
1 Proposal Development	Work with staff to develop a custom proposal for this person?	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
	Review and comment on the draft proposal?	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
	Hand-deliver the proposal to this person?	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
2 Solicitation	Attend a meeting with this person to discuss a proposal?	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
	Attend a meeting with this person and ask them for a gift?	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
	Sign a year-end appeal letter to this person?	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>

Other areas to consider including:

- Qualification
- Cultivation
- Stewardship

Board members select different roles for each relationship and how they can participate in each specific step

Sourcing Names Translates to Gifts



East Loop Foundation¹ Foundation Prospect Referral Form Successes

<i>Step</i>	<i>Total Actions Before Referral Form (2010)</i>	<i>Total Actions Post Referral Form (2015)</i>
Discovery/Introduction	2-3	25
Identification	1-3	30
Qualification	1-3	2
Cultivation	1-3	14
Proposal Development	1-3	6
Solicitation	1-3	247
Stewardship	1-3	126
Total Trustee Actions:	8-21	432

”

The Power of the Referral

“The education around having the board understand that their true role is not just making a gift, but also helping us get in front of other people to make a gift and sending us referrals.”

Campaign Director, Private College

1) Anonymized foundation

Prepare Board Members for Successful Donor Visits

32

Before meeting with a donor, brief board members on:

- ☒ Donor background information
- ☒ The goal for the meeting
- ☒ Who will do what during the meeting
- ☒ How the conversation will flow
- ☒ How to answer difficult questions

Boost Boards' Philanthropic Understanding and Share Their 'Why'

“

Board members are smart people, they have made tremendous successes for themselves in their own work. Yet, for some reason they do not fully understand how those skills can translate to campaign fundraising. **Taking them on gift officer visits is a great way to open their eyes.**”

*Campaign Director
Private Research University*

“

Board members **don't often realize how impactful their story of why they volunteer to serve on the board can be with donors.** We need to do a better job getting the board members, at all levels, not only comfortable telling their stories but giving them the platform to do so in visits.”

*VP Advancement
Public Research University*

Feedback Loops Reinforce Board Partnerships



Embedding Feedback and Coaching After the Visit

Post-Visit Questions

Discuss the visit as soon as it is over, starting with the following questions:

- What key thoughts do you have about our interaction with the donor?
- What went well in this visit?
- What could we do better next time?
- What could I do to make the experience better for you?
- Do you have any specific feedback for me?
- Was our preparation helpful? What do we need to remember for the next visit?

Effective Feedback

Share feedback about what did or did not go well using the following guidelines:



Ground comments in specific circumstances



Provide objective impressions and perceptions



Communicate impact or consequence

Next Steps

Strengthen relationships over time by keeping board members in-the-loop:

- 1 Determine follow-up, including individual responsibilities and timelines
- 2 Inform board members about the final results
- 3 Publicly acknowledge the role of the board member in attaining the gift

Emphasizing Where Faculty Can Shine



Where Division Leaders, Faculty Can Be More Involved in the Donor Life Cycle



Identification

- Assessing donor capacity
- Conducting donor discovery visits
- Meeting donors without informing advancement



Cultivation

- Presenting current research
- Sharing ideas for future projects
- Building donor enthusiasm



Solicitation

- Drafting the proposal
- Planning the visit
- Making the ask



Stewardship

- Reporting outcomes data
- Communicating at key milestones
- Documenting impact over time

Big Ideas Start with Academic Partners, and They Already Have What It Takes



Sourcing Big Ideas

Expertise: faculty bring specialized knowledge and training about a specific topic



Communicating the Impact of Big Ideas

Data: faculty share information about how initiative can impact students and their experiences



Perfecting the Pitch

Narratives: faculty share passionate, compelling stories about why the initiative matters

Breaking Free from ‘Boring’



‘Big Ideas’ Fundraising Turns Donors’ Sights to the Frontiers of the Possible

What Constitutes a “Big Idea”?

- ✓ Aligned with the strategic plan
- ✓ Transforms campus, community, world
- ✓ Elicits cross-campus collaboration
- ✓ Tied to preeminence in select disciplines
- ✓ Requires philanthropy to achieve excellence
- ✓ Increases national acclaim

The “Big Ideas” Fundraising Initiative

- ▶ *Advancement sources transformative proposals from the community and engages academic partners in fundraising for them*

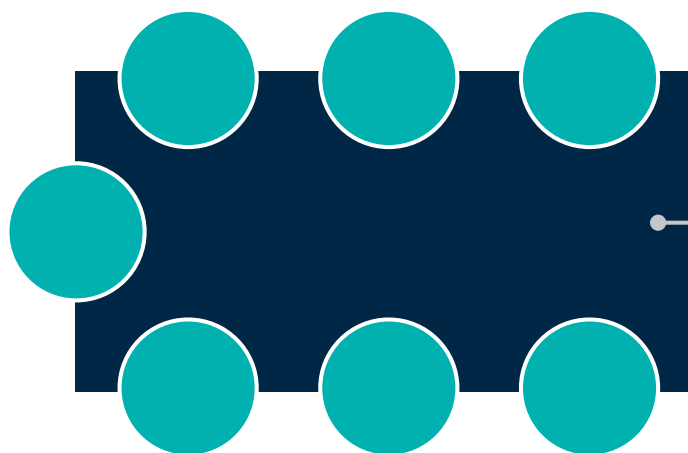
- 1** Ask faculty for major-gift level **funding proposals**
- 2** **Rank, select** the most impactful submissions
- 3** Set those priorities as **campaign pillars**
- 4** Engage academic partners in **cultivation**

Selecting Campaign Ideas Is a Team Effort



Distribute Responsibility for Big Ideas Across Your School

College of Charleston Idea Selection Committee



Committee Members:

- Provost
- Vice President, Advancement
- Vice President, Business Affairs
- Vice President, Student Affairs
- President's Chief of Staff
- Director, Athletics
- Director, Marketing and Communications

Key Actions



Establish Criteria

Set clear standards for choosing campaign priorities and initiatives



Select Ideas Collaboratively

Engages diverse voices in decision-making



Promote Shared Ownership

Aligns leaders around unified campaign goals

Embedding Transparency in the Decision Process



Creating a Principled Scoring Process



Big Ideas Criteria

- ☒ Aligned with the strategic plan
- ☒ High degree of distinction related to preeminence in select disciplines
- ☒ Required philanthropy to achieve excellence

80 Proposals met criteria and continued to scoring process



Big Ideas Scoring System

Transformative impact on campus	10
Meets an immediate need	8
Increases national acclaim	6
Creates pan-campus collaboration	4

Maximum score possible	28
------------------------	----

A Cross-Campus Strategic Planning Committee



Windward School Brings Together Multiple Perspectives



Leveraging Students, Faculty, & Other Stakeholders To Source Big Ideas



Maybe make giving easy slide?



Finding Your Partners

Questions for Today and Questions for Your Team

► Discussion Questions

- What roadblocks have your teams come up against when trying to engage your board in the campaign process?
- Have you experimented with any new strategies for board engagement that either worked well or fell short?
- How have division leaders or faculty typically been involved in the campaign planning process?
- Is there a way for advancement to get involved with differentiation planning on your campus?

► Considerations

- How can we clearly define the role of board members in donor engagement? What should they be more involved in?
- What kind of training or resources should we provide to board members to equip them with the skills and confidence to engage with donors more effectively?
- How can advancement partner with division leaders or faculty on campus to create unique fundraising priorities?
- How can we create cross-functional teams to collaborate on shaping campaign priorities?

Right-Size Campaign Strategy for Today



Make Comprehensive Campaigns More Digestible



Orient Campaign Goals Towards Impact, Not Dollars



Empower Broader School Community for Fundraising Support

STRATEGIES

1. Target Donors Based on Their Interests Using Micro-Campaigns
2. Tackle Fundraising Priorities One at a Time with Micro-Campaign Sprints
3. Showcase Campaign Impact with No-Dollar Goal Campaigns
4. Use Referral Cards to Encourage Board Members' Prospecting Involvement
5. Conduct Pre-and-Post-Visit Huddles To Align Board Members on Roles and Messaging
6. Establish Cross-Campus Big Ideas Committee To Select, Rank, & Prioritize Campaign Initiatives

Advancement Leaders Workshop Series



Right-Sizing Your Campaign for Today's Fundraising Environment

1

Reflect on Today's Fundraising Landscape

February 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 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 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.



202-747-1000 | eab.com

