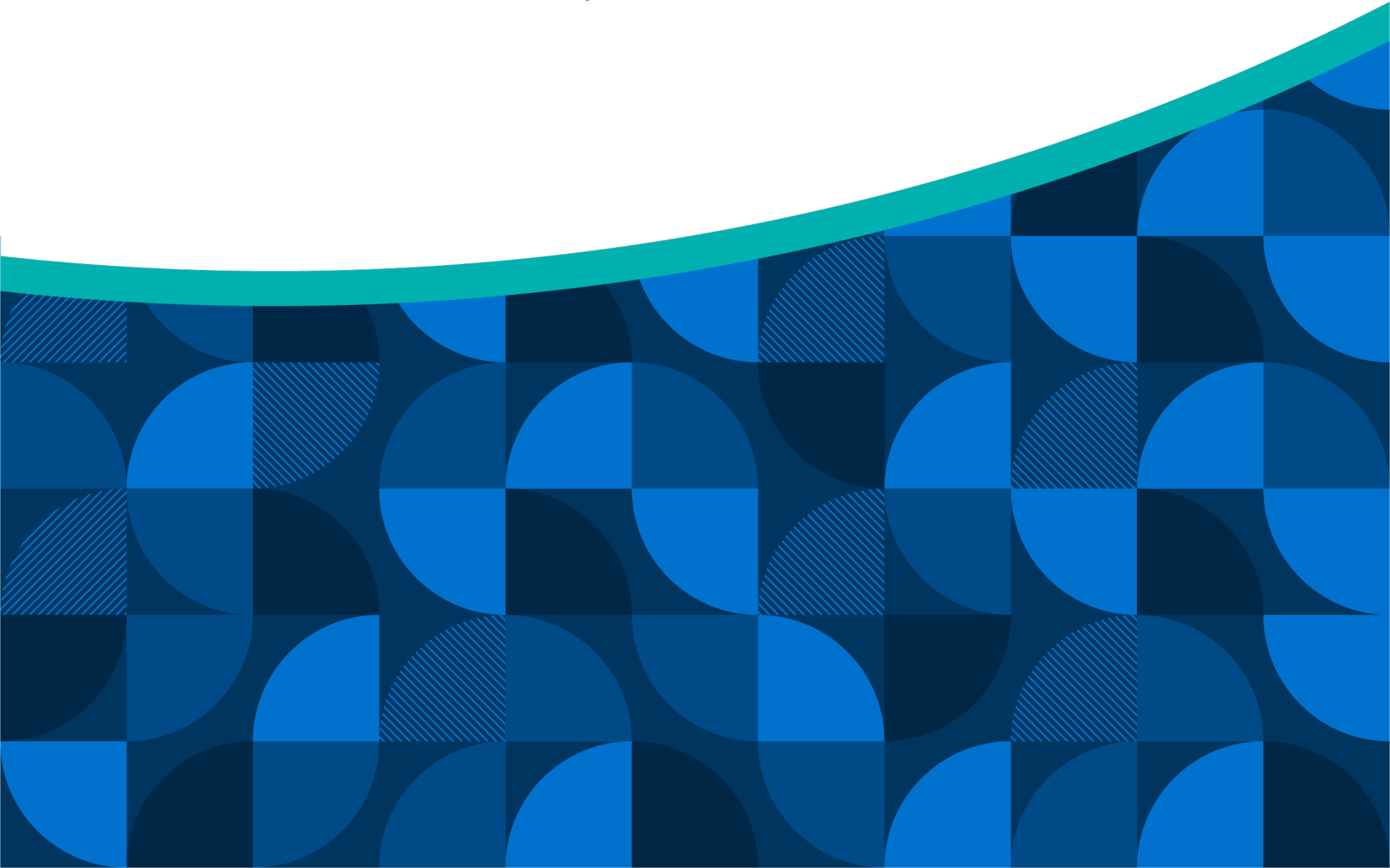




WORKBOOK

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

Session 3 Reflection Activity



# Independent School Executive Forum

## Project Director

Olivia Rios

## Contributing Consultants

Jen Slavick

Breanna Hill

### Legal Caveat

EAB Global, Inc. ("EAB") has made efforts to verify the accuracy of the information it provides to partners. This report relies on data obtained from many sources, however, and EAB cannot guarantee the accuracy of the information provided or any analysis based thereon. In addition, neither EAB nor any of its affiliates (each, an "EAB Organization") is in the business of giving legal, accounting, or other professional advice, and its reports should not be construed as professional advice. In particular, partners should not rely on any legal commentary in this report as a basis for action, or assume that any tactics described herein would be permitted by applicable law or appropriate for a given partner's situation. Partners are advised to consult with appropriate professionals concerning legal, tax, or accounting issues, before implementing any of these tactics. No EAB Organization or any of its respective officers, directors, employees, or agents shall be liable for any claims, liabilities, or expenses relating to (a) any errors or omissions in this report, whether caused by any EAB Organization, or any of their respective employees or agents, or sources or other third parties, (b) any recommendation by any EAB Organization, or (c) failure of partner and its employees and agents to abide by the terms set forth herein.

EAB is a registered trademark of EAB Global, Inc. in the United States and other countries. Partners are not permitted to use these trademarks, or any other trademark, product name, service name, trade name, and logo of any EAB Organization without prior written consent of EAB. Other trademarks, product names, service names, trade names, and logos used within these pages are the property of their respective holders. Use of other company trademarks, product names, service names, trade names, and logos or images of the same does not necessarily constitute (a) an endorsement by such company of an EAB Organization and its products and services, or (b) an endorsement of the company or its products or services by an EAB Organization. No EAB Organization is affiliated with any such company.

### IMPORTANT: Please read the following.

EAB has prepared this report for the exclusive use of its partners. Each partner acknowledges and agrees that this report and the information contained herein (collectively, the "Report") are confidential and proprietary to EAB. By accepting delivery of this Report, each partner agrees to abide by the terms as stated herein, including the following:

1. All right, title, and interest in and to this Report is owned by an EAB Organization. Except as stated herein, no right, license, permission, or interest of any kind in this Report is intended to be given, transferred to, or acquired by a partner. Each partner is authorized to use this Report only to the extent expressly authorized herein.
2. Each partner shall not sell, license, republish, distribute, or post online or otherwise this Report, in part or in whole. Each partner shall not disseminate or permit the use of, and shall take reasonable precautions to prevent such dissemination or use of, this Report by (a) any of its employees and agents (except as stated below), or (b) any third party.
3. Each partner may make this Report available solely to those of its employees and agents who (a) are registered for the workshop or program of which this Report is a part, (b) require access to this Report in order to learn from the information described herein, and (c) agree not to disclose this Report to other employees or agents or any third party. Each partner shall use, and shall ensure that its employees and agents use, this Report for its internal use only. Each partner may make a limited number of copies, solely as adequate for use by its employees and agents in accordance with the terms herein.
4. Each partner shall not remove from this Report any confidential markings, copyright notices, and/or other similar indicia herein.
5. Each partner is responsible for any breach of its obligations as stated herein by any of its employees or agents.
6. If a partner is unwilling to abide by any of the foregoing obligations, then such partner shall promptly return this Report and all copies thereof to EAB.

# Table of Contents

---

**Board Member Referral Form.** . . . . .3

**Reflection Questions.** . . . . .4

# Board Member Prospect Referral Cards

**Use the template below to guide the creation of your school's board prospect referral card.**

The template includes key questions to help you collect useful information on board members' willingness and comfort to participate in campaign efforts. Modify the questions and format to align with your school's needs and preferred method of information collection. It should take board members no more than five minutes to complete.

## Prospect Referral Card

**Your Name:** \_\_\_\_\_ **Prospect's Name:** \_\_\_\_\_

**Residence (Summer):** \_\_\_\_\_ **(Winter):** \_\_\_\_\_ **(Other):** \_\_\_\_\_

**Relationship:** \_\_\_\_\_ **Business:** \_\_\_\_\_

	Would You Be Willing To...	Yes	No	Maybe
<b>1 Qualification</b>	Share how this person first became connected to the school or what drew them to it?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Offer insight into this person's other philanthropic interests or causes they care about?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Help staff understand where the school may fall within this person's broader giving priorities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>2 Cultivation</b>	Invite this person to a school event where they can engage more deeply with the school's mission and impact?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Share your personal story or reasons for giving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Join a one-on-one meeting to help staff learn more about this person's interests and potential giving priorities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>3 Proposal Development</b>	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"/>
<b>4 Solicitation</b>	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"/>
<b>5 Stewardship</b>	Personally thank this person for a gift through a note, call, or visit?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Share updates, outcomes, or stories of how their gift made an impact?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Stay connected with this person over time to keep them engaged for future opportunities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Involving Board Members in Campaigns

---

**Instructions:** Use these questions to reflect on your current practice of supporting board members in getting involved in campaigns more meaningfully.

**How does your school already involve board members in campaigns and sourcing donors?  
What successful strategies have you used?**

---

*Include details here:*

**How could your school use these strategies to better support board members in getting meaningfully involved in campaigns?**

---

*Include details here:*

## Involving Faculty/Staff in Campaigns

---

**Instructions:** Use these questions to reflect on your current practice of supporting faculty and other staff in getting involved in campaigns more meaningfully.

**How does your school already get faculty involved with campaigns? What successful strategies have you used to do so?**

---

*Include details here:*

**How might you incorporate new strategies into your current campaign structure to better get faculty involved?**

---

*Include details here:*

