



# The Next Era of Campaign Strategy

Session #3 April 24<sup>th</sup>, 2025 1-2pm ET

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.*

# Empower Community for More Fundraising Support

4



## 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*

# Agenda for Today



Learn ways to better support board members in meaningfully participating in campaigns



Help faculty and other staff use their expertise to contribute to campaigns by sourcing big ideas that are most attractive to donors



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

# Many Heads Are Acting as a Chief Fundraiser



## 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 cycle<sup>1</sup>

“ 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

# Untapped Support to Meet Increasing Demands



## 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.

## ROADMAP

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# ▶ Board Involvement

- Faculty Involvement
-



# 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: \_\_\_\_\_

### 1 Proposal Development

#### Would You Be Willing To...

Yes No Maybe

Work with staff to develop a custom proposal for this person?

Review and comment on the draft proposal?

Hand-deliver the proposal to this person?

### 2 Solicitation

Attend a meeting with this person to discuss a proposal?

Attend a meeting with this person and ask them for a gift?

Sign a year-end appeal letter to this person?

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 Foundation<sup>1</sup> Foundation Prospect Referral Form Successes

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

## 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

# Getting Board Members Involved

## Questions for Reflection

- **How does your school already involve board members in campaigns and sourcing donors?**
- **How could your school use these strategies to better support board members in getting meaningfully involved in campaigns?**



## ROADMAP

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- Board Involvement

## ▷ Faculty Involvement

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# 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
- ✓ Tied to preeminence in select disciplines
- ✓ Transforms campus, community, world
- ✓ Requires philanthropy to achieve excellence
- ✓ Elicits cross-campus collaboration
- ✓ Increases national acclaim

## The “Big Ideas” Fundraising Initiative

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

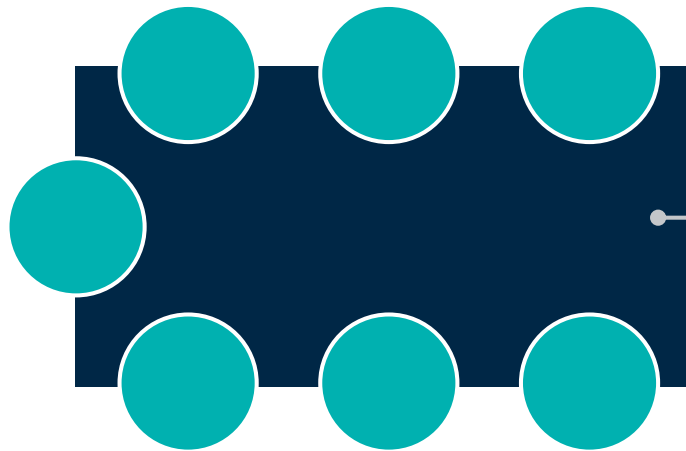
- 1** Ask faculty for major-gift level **funding proposals**
- 2** **Rank, select** the most impactful submissions
- 3** Set those priorities as **campaign pillars**
- 4** Engage academic partners in **cultivation**

# 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



### Forms Committee with Broad Perspectives

- Incoming board chair leads planning committee, membership includes **senior leadership, academic representatives, trustees, key donors, parents, & students**

### Group Collaborates on Big Ideas

- Discusses school **strategic initiatives** & which opportunities are **most promising**
- Generates a **“wish list” of big ideas** for school to prioritize based on input from all departments to address key needs
- **Unifies campaign direction** by integrating diverse viewpoints to create a cohesive, school-wide vision for the campaign

### Students and Donors Provide “Reality Check”

- Students provide invaluable **real-world perspective** that can be used to make compelling cases to donors
- **Ideas are pressure tested** with donors and parents throughout committee discussions

# Getting Faculty Involved in Campaigns

## Questions for Reflection

- **How does your school already get faculty involved with campaigns and what successful strategies have you used to do so?**
- **How might you incorporate new strategies into your current campaign structure to better get faculty involved?**



# Reflecting on Your Current Practice



Reflection Questions

## 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:

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Reflection Questions

## 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?**

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Session  
March 27

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

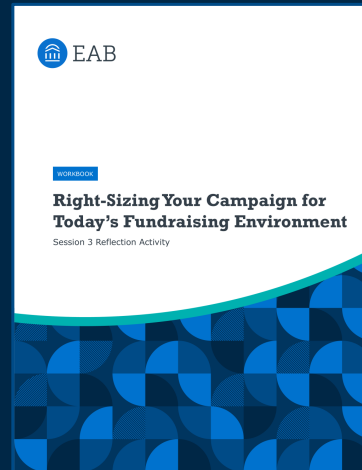
## Protected Work Time:

# Reflect on Your Current Campaign Practices

**Time: 10-15** minutes

## EAB Resources:

### Session 3 Workbook



### *Includes: Self-Reflection*

This image shows a page from the workbook. At the top, it says 'Reflection Questions' and 'Involving Board Members in Campaigns'. Below that, there are instructions: 'Instructions: Use these questions to reflect on your current practice of supporting board members in getting involved in campaigns more meaningfully.' There are two main questions: 'How does your school already involve board members in campaigns and sourcing donors?' and 'How could your school use these strategies to better support board members in getting meaningfully involved in campaigns?'. Each question is followed by a large, empty text box labeled 'Include details here:' for the user to write their response.

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

# Reflecting on 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 getting board members, division leaders, and faculty involved in campaigns?
- ✓ Share ways your school could better be employing these practices.





**Welcome back!**



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



## **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

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