Designing a Winning Fundraising Campaign

5 Keys to Success

The Council for Aid to Education (CAE) reports that charitable contributions to US colleges and universities reached a record level of $33.80 billion in 2013. According to the annual Voluntary Support of Education Survey, the previous historical high point was $31.60 billion in 2008. Giving fell to $27.85 billion in 2009 and has gradually recovered from that loss until reaching the new high. That’s great news for most Advancement professionals; however, Anne E. Kaplan, CAE Survey Director, advises, “The time to make your case for support and to engage those who care about your institution should be advanced independently of the economic climate for giving.”

The overall mood of the economy is only one factor influencing the intensity of your institution’s philanthropic support. Much of your success revolves around designing and implementing advancement best practices unique to your institution, one fundraising effort at a time. Whether you’re planning a comprehensive, multi-part campaign, a single project funding effort, or your annual giving program, here are five keys to designing a winning fundraising campaign.

1. Create Meaning
We all know donors who can be very selective about their philanthropic support. With many worthwhile causes vying for their attention, alumni and other potential givers are often most motivated by highly personal connection and engagement. A fundraising campaign plan that is aligned with both the strategic priorities of your institution and a particular area of interest to your constituents will have a better chance of rising to the top of the pile. Clearly demonstrating how giving to your campaign will advance your school’s educational quality and help fulfill its mission will help donors to connect with its meaning, often turning them into champions for your cause themselves.

Conversely, it’s important that your campaign’s aim is not too lofty or unrealistic, since readily realizable goals allow donors to “make a difference” and see results. Smaller, more frequent, but still meaningful campaigns help show immediate progress and also reassure givers that the institution is making good use of their resources. And when positive progress clearly advances educational quality, it encourages continued support.

2. Tell a Personal Story
Choosing projects that are of personal interest to prospects will give your campaign the best chance of success. By creating a tangible story around what you are trying to achieve, your program gains credibility and affinity. During an annual fund design process, making individualized appeals to a wide variety of groups (reframing your story with a familiar context for each group) will encourage participation from across the entire campus and community. Blending projects that cover a broad spectrum—such as scholarships, technology, and related capital projects—into a single effort increases the pool of interested prospects from which you can draw support, while still making it personal.

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3. Put it in Writing

From the beginning, scoping out the strategy and detailing the tactics for your campaign—including measurable milestones—is critical for aligning volunteers and team members for success. Even during smaller funding efforts, a written plan identifying the “definition of victory” will help all members fully understand the desired goals. For large fundraising campaigns, a carefully laid out plan can mean the difference between missing your goal and exceeding it.

The written plan should be approved by all members of the executive staff to ensure that your efforts directly and specifically advance the mission of the institution. Organize a committee comprised of members of the institution from many levels to provide input into the plan, and generate campus-wide sponsorship.

Your plan specifics should outline timelines and a system for accounting donations toward the effort. The Council for Advancement and Support of Education (CASE) has many tools for helping to develop effective campaigns, one component at a time. And the CASE Reporting Standards & Management Guidelines provides standards for campaign reporting, guidance and recommendations for timelines, and standards for the handling of gifts, pledge commitments, and deferred gifts.

4. Research and Cultivate the Best Prospects

Cultivating donors is the most critical component of any advancement campaign. Matching prospects to the right projects requires an enormous amount of research and knowledge of the donor pool. Establish goals for the various constituencies within your institution—and match those constituents to their affinities. Use outside research resources as well as institutional knowledge to provide the basis of your target analysis. This kind of research will also help determine how much outside prospect identification and foundation support is needed. Campaign consultants are available to assist with prospect research and selection if required. Once your prospects have been identified, they will require careful cultivation and stewardship to manage and grow the relationships. There are expert consultants you can tap as resources in this area as well.

5. Leverage Effective Technology

Managing a fundraising project, whether large or small, can be optimized with modern advancement software designed specifically for higher education. Jenzabar® Advancement is a fundraising toolset used to streamline and simplify the management of campaigns and donor activity for both major gifts and the many annual donations on which your institution depends. It helps everyone on your fundraising team—from administrators to managers and solicitors—work smarter.

Jenzabar Advancement deepens affinity through powerful communication tools and personalized interactions, and strengthens your appeals with extensive biographic/demographic research information, and online access to complete constituent profiles.

You can simplify campaign management with easy access to key campaign statistics and relevant staff and volunteer assignments, while monitoring progress and adjusting resources and strategies as needed. Office staff can process donations and personalized communications efficiently, and solicitors have quick and easy access to comprehensive data, their calendars, and to-do lists for managing interactions, strengthening important relationships, and cultivating stewardship.

The combination of prospect management, cultivation tracking, and campaign and gift accounting integrated into a single software system can provide highly effective results for your next winning fundraising campaign.

About Jenzabar

Jenzabar is a leading provider of enterprise software, strategies, and services developed exclusively for higher education. Our integrated, innovative solutions advance the goals of academic and administrative offices across the campus and throughout the student lifecycle.

Jenzabar’s mission is to maximize our clients’ success. Our award-winning software and experienced professionals provide our clients the tools and resources they need to thrive. As a trusted partner on more than 1,000 campuses worldwide, Jenzabar has over four decades of experience supporting the higher education community.