



Leveraging your Planning Study for Campaign Success

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Agenda

- I. Lake Highland Overview
- II. Mechanics of a Planning Study
- III. 5 Campaign Essentials
- IV. Goals of a Planning Study
- V. Who do we engage in the process?
- VI. Key Outcomes
- VII. Leveraging outcomes for campaign success



I. Lake Highland Overview

➤ Overview of Fund Development Program

➤ Culture of Philanthropy

➤ Past Campaign Successes

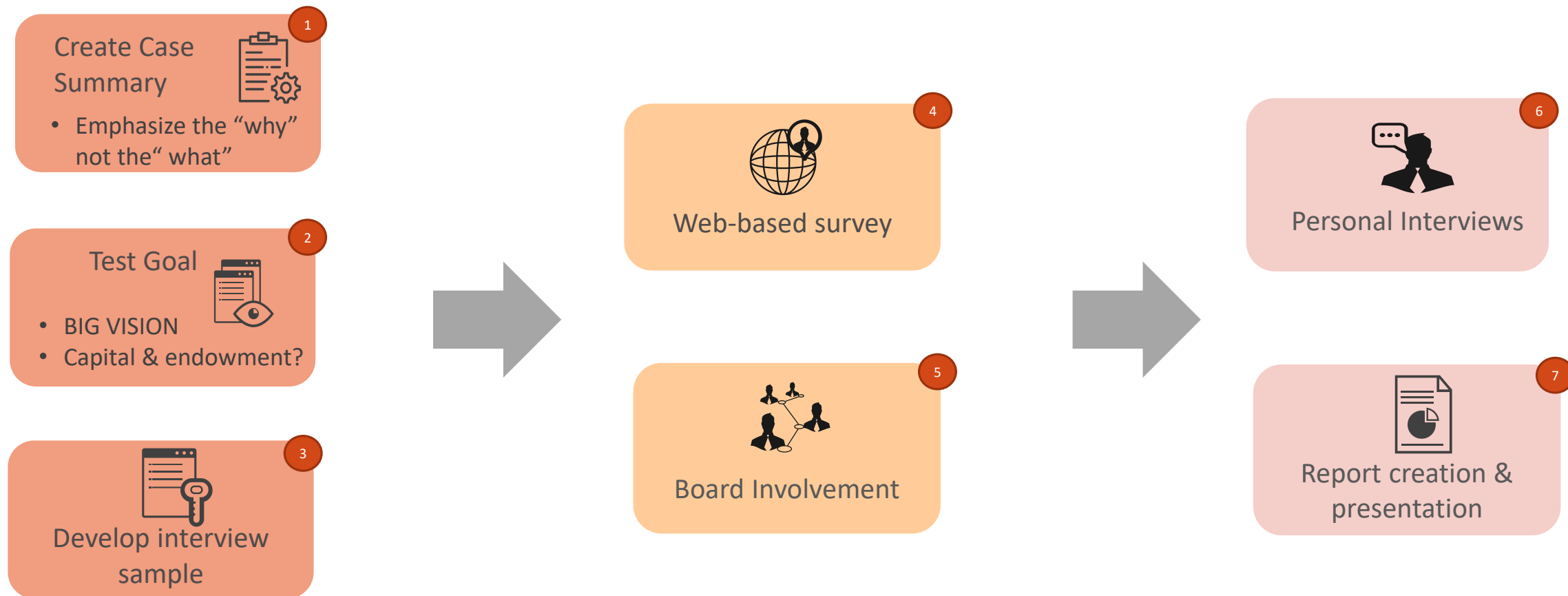
➤ Current Case for Support



Suggested steps for any school considering a Planning Study

- Establish budget for planning study
- “Sell” rationale for study to President, Board (including Development Committee) and senior leadership
- Prepare school family for study. What processes must happen first?
 - New Strategic plan?
 - Master Plan update?
 - Board support
- Call peer schools for their recommendations of consulting firms
- Interview firms, compare proposals, meet team you will work with
- Hire consulting firm

II. Mechanics of a planning study



III. Five Campaign Essentials



Leadership



**Emotional &
urgent Case**



**Adequate internal
resources**



**A great plan
(purpose of the
planning study)**



**Access to
needed dollars**

IV. Goals of a Planning Study

- Determine the readiness of a school for a major campaign initiative
- Evaluate the fundraising potential for the proposed campaign
- Test initial Case Summary
- Create a sense of ownership for the campaign among key constituents
- Develop an initial campaign plan

IV. Goals of a Planning Study

- Identify major gift prospects
- Identify potential campaign leaders and volunteers
- Protect the school from a negative experience
- Establish early momentum for the campaign
- Enhance your school's culture of philanthropy which will carry on after the success of your campaign

V. Who is engaged during the process?

- Board members
- Past trustees
- Alumni
- Parents
- Alumni parents
- Grandparents
- Select staff
- Other major supporters of the school

VI. Key Outcomes

Sights are raised & interviewees feel a sense of ownership

Image and reputation of school are evaluated

Prospect Pool & Campaign plan are created

Case Study is finalized & Internal Readiness is determined

Leadership identified

VI. Evaluated during Planning Study

School & Image

- Academics, athletics, art
- Community impact

Case Summary

- Perception of the Case
- Strengths & weaknesses
- Obstacles to overcome & opportunities to capitalize on

Internal Readiness

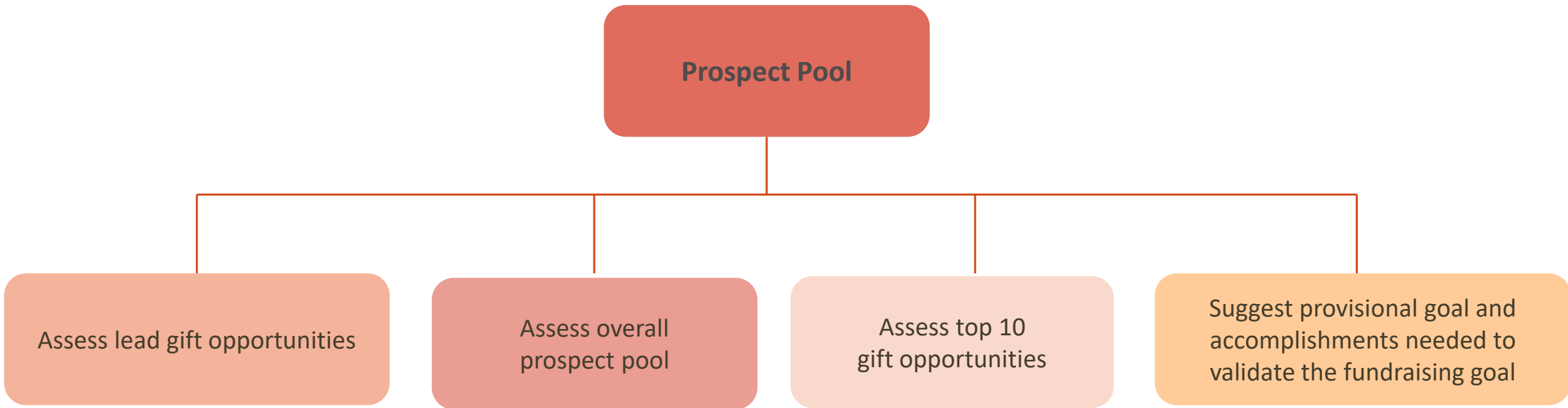
- Staff capacity for the campaign
- Internal structures & systems
- Volunteer readiness

Leadership

- Board strength and engagement
- Identification of key leaders



VI. Outcomes of a Planning Study



VI. Outcomes of a Planning Study

Campaign Plan



LEADERSHIP STRUCTURE

XXX



TIMELINE

XXX



STAFFING ROLES

XXX



BUDGET

XXX

VII. Leveraging outcomes for a successful campaign

Generate momentum from the study

- Share results with interviewees
- Share results with other key stakeholders

Slowly and carefully enlist the best possible campaign leaders

Transform the Case Summary into a full-blown Case for Support

Develop a sense of ownership among:

- Alumni
- Parents
- Alumni parents
- Grandparents

A large group of African children, mostly of elementary school age, are shown from the chest up. They are all smiling and have their hands raised in the air, some with fingers spread, suggesting a celebratory or enthusiastic response. The children are wearing various colorful clothing, including a prominent red and white striped shirt in the foreground. The background is slightly blurred, showing more children and a bright, outdoor setting. The overall mood is joyful and energetic.

Questions?