CASE Seminar Inspires a Renewed Culture of Philanthropy at the Academy of Saint Elizabeth

The Academy of Saint Elizabeth is the oldest all-girls Catholic high school in New Jersey, U.S. Shortly before Megan Knight became the Director of Development and Alumnae Relations, the academy independently incorporated and became responsible for its entire annual budget. After routinely observing murky year-end results using a common fundraising model, Megan registered for the Council for Advancement and Support of Education's Annual Fund online seminar. Within a year, Megan adapted the key takeaways from the seminar and created a stable and sustainable culture of philanthropy at the academy.

THE CHALLENGE

Fragmented Fundraising Efforts Resulted in a Year-End Crunch

Crucial Volunteers Needed Focus and Empowerment

Prior to Megan joining the school, there had not been an established professional fundraising program at the academy. Fortunately, as a one-person team, she was able to leverage a dedicated parent association. This group worked hard to raise critical year-end gifts for the school, but fundraising wasn't cohesive.

Alumnae Engagement Remained Underutilized

While the parent association fostered a strong community of current families, there hadn't been a clear open door for ongoing engagement or involvement among the school's most valuable assets.

Opportunity Existed in a Stronger Culture of Philanthropy

Megan maintained an excellent relationship with the school's parent association, but there wasn't an integrated culture of philanthropy. Routine donors gave out of habit, but most weren't well educated about the effect of their contributions.

As a Result, Megan Faced a Few Key Pain Points:

- There was untapped potential in key constituent groups.

- It was often hard to tell how the budget would shake out after the spring fundraiser.

- Even though funds were crucial for scholarships and long-term enrollment success, the most urgent need was always closing the gap between revenue and expenses.

Front-Loading the Annual Fund Seminar Changed the Entire Playbook for Advancement and Alumnae Relations at the Academy

A Data-Proven Framework

From the extensive data and detailed examples provided in the seminar, Megan was able to see clearly how she could apply CASE's framework at the academy.

- Through CASE's research, Megan could suddenly see where the academy's income statement stood in comparison to similar independent schools.

- She became confident her school could be more successful and raise more money by deploying the CASE framework for the annual fund.

- She was able to affirm an idea she was already nurturing to establish a new fundraising committee that would engage an untapped constituent group.

A Strong Case of Support

Once Megan saw the proven framework presented in the CASE seminar, she used the data to build a case for support to implement her new committee. She then presented her case to leadership and the parent association.

- With confidence, Megan was able to prove why she wouldn't need $20,000 a year from the parent association anymore.

- Thanks to her new data-driven strategy, she earned the trust of her colleagues and volunteers to become responsible for fundraising $100,000 annually.

- She empowered the parent association to focus exclusively on community-and relationship-building efforts with current families.

A Clear Road Map for Long-Term Success

Armed with the right tools and resources, Megan was able to establish an entirely new strategy that aligned the whole community toward a better goal: front-loading the annual fund.

- Whereas the current parent association mostly comprised moms of current students, Megan assembled a new committee of dads who became solely focused on fundraising.

- This new group—the Knights of Saint Elizabeth—harnessed the goodwill and support of fathers who could share the profound affect the school had on their daughters' success.

- Megan deployed her new committee in a comprehensive three-month fundraising campaign that culminated on Giving Tuesday and generated incredible results.

> **"CASE has so much data to support their best practices and recommended frameworks. It's not theoretical. The data proves it's the best way to do it. Because they're a national organization, their data is more valid, and they normalize the challenges we're all facing as independent schools."**
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> **—MEGAN KNIGHT**
> Director of Development and Alumnae Relations, the Academy of Saint Elizabeth

Donations to the Annual Fund Increased by 64% in Three Years

With the support and clarity provided by CASE resources, Megan was able to fast-track a more sustainable fundraising strategy for the academy.

Ultimately, Megan faces similar challenges as most independent school development professionals: generate donor enthusiasm around recurring overhead costs. From the national data presented in the CASE seminar, Megan was able to package a more effective and consistent message to better educate donors. Volunteers and donors understood expectations more clearly. And engagement grew among parents, alumnae, and students who observed their families' involvement.

By applying principles from CASE's Front-Loading the Annual Fund seminar, the academy experienced a 20x increase in its leadership giving membership in three years.

The Academy of Saint Elizabeth can support its operations, athletics, and financial aid with a stable, sustainable annual fund.

A stronger strategy eliminated reliance on the parent association.

Strong data laid the groundwork for engaging untapped volunteer potential.

Consistent, meaningful messaging improved donor awareness and education.

A clear pathway and purpose for giving helped elevate donor capacity.

A singular cohesive strategy aligned all constituents toward the right goal.

CASE resources delivered actionable data and best practices on demand.

Want to learn how CASE can help transform your culture of philanthropy?

Get in touch to explore exclusive CASE member resources and introductory membership pricing.

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