



PRESENTATION TO **NCAIS**

Lessons Learned from the FCDS
Campaign Experience





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Forsyth Country Day School



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About Us

Since 1984, CapDev has been making nonprofits better through inclusive philanthropy consulting and search services.

Our Mission

CapDev partners with nonprofit communities to enlist, empower, and embolden its leaders to embrace the transformational power of inclusive philanthropy.

Our Principles

Enlist

We identify and connect leadership.

Empower

We partner to build sustainability.

Embolden

We encourage talent and leadership.

Embrace

We transform lives through relational philanthropy.



About Forsyth Country Day School

- Founded in 1970
- Mission: “A Community of Learners Dedicated to Preparing Our Students for What’s Ahead” - lived daily through personalized instruction, cross-division collaboration, and a culture of curiosity, compassion, responsibility, respect, and integrity
- Average class size: 14, with 21 AP and 19 Honors-level courses
- Class of 2025: \$4.7M in scholarships, 100% college acceptance to 122 colleges in 17 states and two countries, including Stanford, Yale, Georgetown, Johns Hopkins, UPenn, UNC-Chapel Hill, and UVA
- Four-time Wells Fargo Cup winner (2021–2024) as NC’s top athletic program; 16 state championships from 2021–2025, a school record
- 20+ major campus improvements in the past 6 years, including: the Niblock Center, Williams Library Discovery Center, Danforth Middle School, Bloodworth Family Outdoor Classroom, Legacy Track, Williams Family Tennis Center, Perrott Athletic Tower, and Infinity Amphitheater



About the FCDS Campaign



For What's Ahead:

Comprehensive Campaign for:

- Reimagined Williams Library Discovery Center with Fury Café and Fury Ltd.
- Niblock Center for Intentional Living
- Brighter Middle School
- Modern learning spaces and programs
- Raised endowed funds

Started: 7/1/19

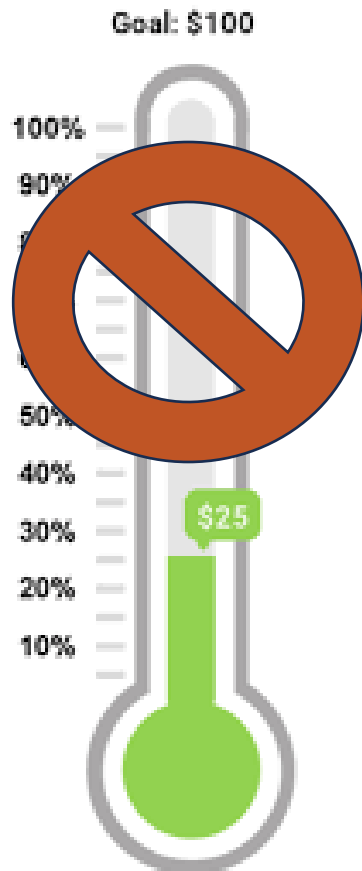
Concluded: 6/30/24

Goal: \$13M

Raised: \$13,533,851.03



The Importance of Campaign Preparation



Why undertake a campaign?

1. To successfully raise funds to meet or exceed a goal.
2. **To significantly increase:**
 - Recognition and value of the organization
 - Number and gift levels of donors
 - Fundraising capacity and abilities of the organization
 - Quantity, quality and commitment of volunteer leadership
 - Long-term financial stability
 - Build relationships and reconnect members of all constituencies



Campaign Data

Total Annual Donors Year Prior to Campaign	Final Year of Campaign	Year Following Campaign
636	1140	1108
Total Annual Alumni Donors Year Prior to Campaign	Final Year of Campaign	Year Following Campaign
166	366	408
Major and Lead Gifts Year Prior to the Campaign	Campaign (5 year period, '19 - '24)	Year Following Campaign
3	129 (26 per year)	17
Total Giving for Year Prior to Campaign	Average Total Giving Per Year During Campaign	Year Following Campaign
\$781,371	\$2,948,859	\$2,858,251



Expectations of Leadership

Campaign leaders are enlisted but depend on the Advancement Office:

- Not self-governing
- Expect staff to fill roles
 - Set up meetings
 - Provide materials
 - Manage follow-up





Understand People

Capacity

Inclination



“We would not have made this gift if not for the campaign.”



Process of Relationship Development Continues

- Developed a process for doing relational development, including:
 - Relationship building
 - Relationship repair
 - Relationship maintenance
- Built cultivation and stewardship habits in campaign
- Ensure processes work post-campaign
- Relationship development continues
 - Example: regular breakfasts with campaign leader/major donor

*“We didn’t know what we didn’t know.
Campaign taught us.”*





FCDS Stewardship Matrix Example

Stewardship Task Distribution		Performed by	\$1M+	\$500k+	\$250k+	\$100k+	\$50k+	\$25k+	\$5k+	\$2.5K+	\$1k+	<\$1K	Trustee	Faculty Staff	New Family	Alumni	Planned Gift
Head of School, Associate Head of School for Advancement																	
Formal Acknowledgment Thank You Letter		Head of School	✓	✓	✓	✓	✓	✓	✓				✓	✓			✓
Phone Call		Head of School	✓	✓	✓	✓	✓	✓									✓
Formal Acknowledgment Thank You Letter		Assoc. Head of School Adv.	✓	✓	✓	✓	✓	✓	✓				✓	✓			✓
Phone Call		Assoc. Head of School Adv.	✓	✓	✓	✓	✓	✓									✓
Update and Review Major Gift Portfolios		Link															
Board of Trustees																	
Formal Acknowledgment Thank You Letter		Board Chair	✓	✓	✓	✓	✓	✓					✓				✓
Formal Acknowledgment Thank You Letter		Chair of Adv. Sub.	✓	✓	✓	✓	✓	✓					✓				✓
Philanthropy Team																	
Formal Acknowledgment Thank You Letter		Dir. of Philanthropy	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			✓
Formal Acknowledgment Thank You Letter		Assoc. Dir. of Philanthropy	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			✓		✓
Formal Acknowledgment Thank You Letter		Dir. of Alumni														✓	
First Time Gift Acknowledgment Postcard		Donor Relations													✓		
Gift Acknowledgement, Thank You, & Rece		Donor Relations	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Update and Review Major Gift Portfolios		Link															



Relationship Modeling:
Demonstrate mentorship
Gain & keep comfort level

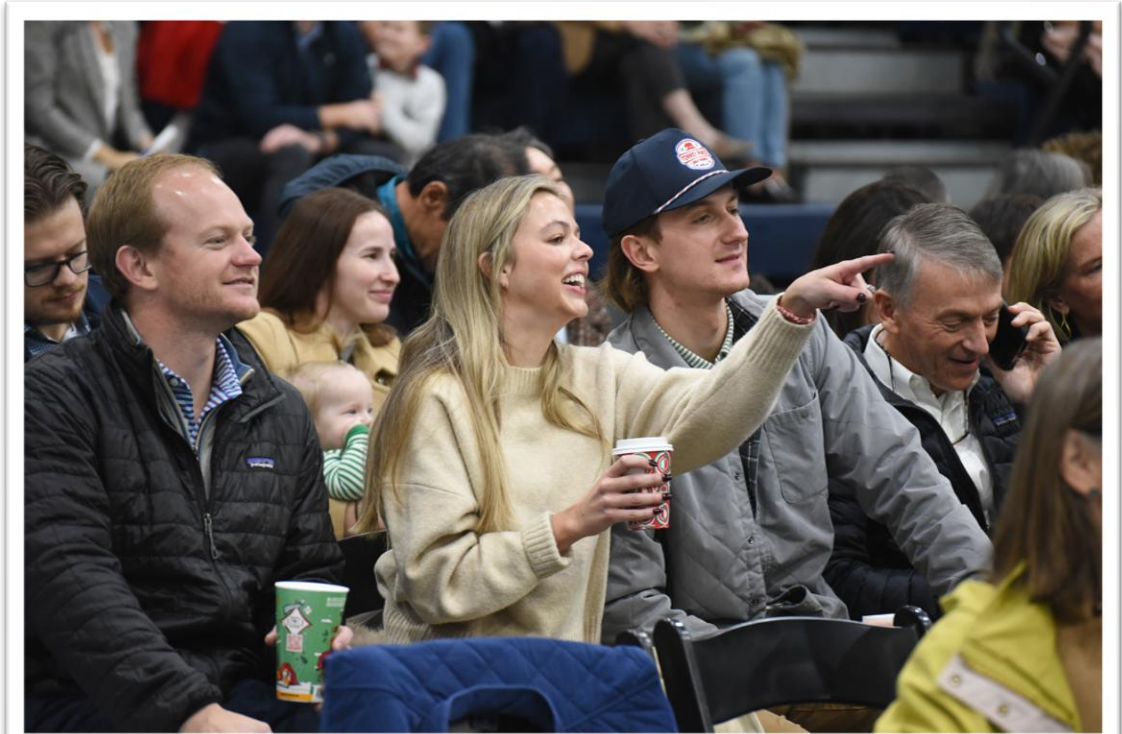


Continue the Major & Lead Gifts Program

- Developed robust major & lead gifts work in campaign
- Continuous work post-campaign

Example: largest current family gift in over 20 years came after campaign

Example: exceed annual fund goal every year since campaign started





Produce a Strong Proposal Template: Example



Example Proposal: pg. 1-2

For Here. For Now. For What's Ahead.

Forsyth Country Day School



PROPOSAL IN HONOR OF THE SMITH FAMILY



FORSYTH COUNTRY DAY SCHOOL IS A COMMUNITY OF LEARNERS DEDICATED TO PREPARING OUR STUDENTS FOR WHAT'S AHEAD.



Forsyth
For What's Ahead

INNOVATING CLASSROOMS

At Forsyth Country Day School, we envision classrooms as dynamic, ever-adapting learning spaces that reflect the chameleon-like nature of learning itself. Our vision is rooted in the belief that the **physical environment profoundly shapes both wellness and educational outcomes**. To bring this vision to life, we draw inspiration from the WELL Building Standard, recognizing that a thoughtfully designed space can elevate the physical and emotional well-being of students and educators alike.

This past summer, we **completed a full transformation of our Middle School classrooms**, bringing this vision to reality for our students and teachers. Our next goal is to **extend this transformation to our Upper and Lower Schools** in the coming summer—ensuring every division benefits from innovative, wellness-centered spaces.



Multi-divisional classroom layouts that emphasize furniture flexibility and differentiated learning environments.

Our classrooms are intentionally designed as bustling hubs of activity, with expandable work zones that guide movement and focus, and dedicated nooks for small-group collaboration, hands-on making, content creation, and independent study. In these spaces, **flexibility meets purpose**—allowing teachers and students to adapt their environment to the evolving demands of learning. This intentionality transforms the classroom into a “third teacher,” shaping an immersive and holistic learning experience every day.

This vision is supported by a multi-year partnership with **Steelcase, Smith System, and STORR**—industry leaders in K-12 learning environments. Their recognition of Forsyth Country Day School's research-driven and student-centered approach underscores our shared commitment to transforming educational spaces. Through this collaboration, we continue to refine our approach to classroom design and implementation, ensuring every space is grounded in five key elements: **wellness, flexibility, standardization, technology, and accessibility**.

These core principles serve as the foundation for learning environments that accommodate diverse learning styles, support a range of instructional approaches—from collaborative work to focused individual tasks—prioritize health and cleanliness, and foster a sense of connection between the indoors and outdoors, and among members of our school community.



Example Proposal: pg. 3-4

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FCDS IS LEADING THE WAY

- **Average class size of 14** with **21 AP** and **19 Honors-level courses**.
- **Innovative learning environments**—modern classrooms implemented in each division and the Johnson Academic Center, in partnership with Steelcase—feature flexible furniture, optimized lighting, adaptive finishes, and integrated technology to support student growth.
- **Class of 2025: \$4.7M** in scholarships, **100% college acceptance** to 122 colleges in 17 states and two countries, including Stanford, Yale, Georgetown, Johns Hopkins, UPenn, UNC-Chapel Hill, and UVA.
- **National Merit Scholarship winner** in the Class of 2024.
- **Four-time Wells Fargo Cup winner** (2021-2024) as NC’s top athletic program; **16 state championships** from 2021-2025, a school record.
- **20+ major campus improvements** in seven years, including the Niblock Center, Williams Library Discovery Center, Danforth Middle School, Bloodworth Family Outdoor Classroom, Legacy Track, Williams Family Tennis Center, Perrott Athletic Tower, and Infinity Amphitheater.
- Mission—“**A Community of Learners Dedicated to Preparing Our Students for What’s Ahead**”—lived daily through personalized instruction, cross-division collaboration, and a culture of curiosity, compassion, responsibility, respect, and integrity.



Forsyth
For **What’s Ahead**



Focus on Donor Retention

- New donors in campaign
- Lagged donors returned in campaign
- Database grew from 600 in campaign to now over 1,100
- Focus on retention:
 - Stewardship matrix examples:
 - Delivering a new alumni hat or socks to donors
 - Initiating calls & visits
 - Impact and gratitude reports
 - Focused socials, i.e. Legacy Trustees
 - Notes and photos
- Good way to engage board/leaders in stewardship





Example: Donor Stewardship Matrix

Donor Stewardship Matrix							
Annual Giving Societies	Vision Society			1970 Society		Additional Giving Levels	
Designations	Founders' Club	Head's Table	Trustees' Circle	Scholars' Circle	Honor Roll Circle	Forsyth Circle	Supporter
Gift Ranges	\$20,000+	\$10,000-\$19,999	\$5,000-\$9,999	\$2,500-\$4,999	\$1,970-\$2,499	\$500-\$1,969	\$499-Below
Gift Acknowledgement, Thank You, & Receipt	✓	✓	✓	✓	✓	✓	✓
Hand Written Note from Head of School	✓	✓	✓	✓			
Hand Written Note from Board Chair	✓	✓	✓				
Hand Written Note from Director of Philanthropy	✓	✓	✓	✓	✓		
Student Gratitude/Impact Message	✓	✓	✓	✓	✓	✓	✓
Head of School Update Letter	✓	✓	✓	✓	✓		
Annual Impact Report	✓	✓	✓	✓	✓	✓	✓
December 1970 Society Gift Delivery	✓	✓	✓	✓	✓		
State of School Event Invitation	✓	✓	✓	✓	✓	✓	✓
May 1970 Society Social Event	✓	✓	✓	✓	✓		
Head's Table Dinner	✓	✓	✓				
June Donor Thank You Postcard	✓	✓	✓	✓	✓	✓	✓
Amidst The Trees Magazine	✓	✓	✓	✓	✓	✓	✓
Donor Newsletters (Fall and Spring)	✓	✓	✓	✓	✓	✓	✓
1:1 With Head of School	✓	✓					



Think About Events Differently

- Hold more smaller, intentional events
- Examples:
 - Held first Legacy Trustees event → now annual (in homes or club)
 - Held Legacy Faculty and Staff event → now annual
 - Targeted neighborhoods (Brookberry)
 - Downtown staffers (RJR)
 - Legacy Family event





Keep Corporate Partners Close

- 11 corporate partners pre-campaign
→ 65 now
- Established deliberate, meaningful relationships
- **Example:** Novant – Signature Health & Wellness Partner
- **Example:** Truist – economic mobility funding for STEM





Learn How Boards Operate

- Current board operations
- Advisory boards
- Use of Board of Advisors (CEO involvement)
- Changes in role of the board in Advancement
- **Example:** annual fund goal-setting decisions
 - Used data to inform decision → reduced goal to baseline
 - Greatest challenge – current parents → shift focus elsewhere
 - Board giving → boost to \$5k each = 20% of goal





Reduce Advancement Staff Turnover

- Consider your advancement team retention
 - Reduce independent school advancement turnover
 - Campaign = good team training
 - Post-campaign benefits:
 - Roles changed from the start to end of campaign
 - Identified strengths of existing staff
- “Where we all found our wheelhouse”*



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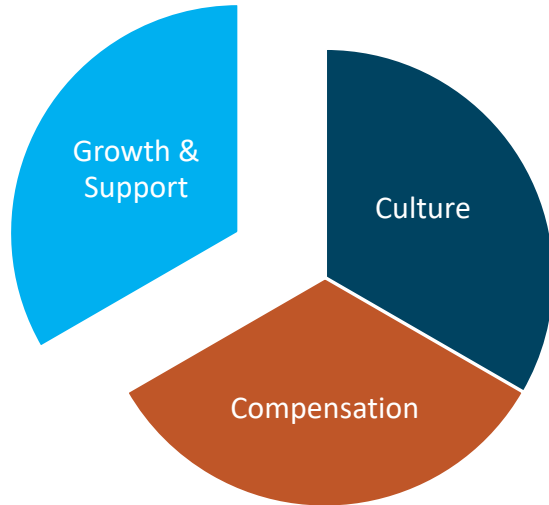
Michel Ellis

Donor Relations Officer

Campaign helps with process of “natural selection.”



Attraction: Cultivating an Irresistible Workplace



- Professional development
- Cross-training
- Mentorship
- STAY INTERVIEWS: Rockstar or Superstar?

The top reason why employees leave is **CAREER GROWTH**.
Source: Work Institute



Consider Campaign Rhythm

- K12 cadence of campaign planning cycle
 - New initiatives/opportunities
 - Next capital projects
 - Endowment needs







Flex Your Campaign Muscles





- Campaigns = muscle training work
- Must continue to use muscles to maintain
- Ask permission for a proposal
- **Example:** current parent wanted to make a gift to athletics → prepared a quick \$50k proposal

“Always be ready.”


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Thank you

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Q&A and Discussion