



The Last 90 Days: How to Close Your Annual Fund Strong

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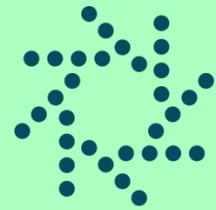
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Poll Time!
**How are you pacing to
hitting your annual fund
goal?**

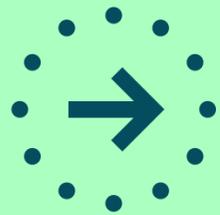


Agenda:



Topics:

- 1. The Invisible Cost*
- 2. What (actually) Moves Donors*
- 3. Your 90 Day Playbook*



Our Case Studies:

- Rabun Gap-Nacoochee School (GA, K-12)*
- Charles Wright Academy (WA, K-12)*



Resources and Q&A



The only fundraising platform built for K-12

Engage

Fundraise

Understand



1166

of 550 supporter goal

Leaderboards

Alumni Leaderboard

Class year	# Donors	Total
1984	125	\$16,912

Pages that feature
your K-12 community

Apple Pay DAFs
PayPal venmo

No-setup modern
payment options



Dedicated 1-1 support
from a K-12 expert

Part One

The Invisible Cost

THE INVISIBLE COST

What does your donor journey look like right now?

STEP ONE: THE APPEAL

105 : 00 : 44 : 49
Days Hours Minutes Seconds



Hello ,

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This year, 312 families, alumni, and friends have already made a gift to The Greenfield Fund. That's more than we've ever had at this point in the year, and I'm genuinely proud of this community for showing up the way it has.

But we're not there yet. We're at 78% of our \$750,000 goal, and we have until June 30 to close the gap.

Your gift to The Greenfield Fund goes directly to the things that make this school what it is: faculty who stay because they're supported, financial aid that lets us say yes to more families, and programs like outdoor education and the arts that our students remember long after they graduate.

Last year, your gift helped fund a new recording studio for our upper school music program. This year, we're hoping to expand our middle school robotics lab. Every gift, at any level, moves us closer.

If you've been meaning to give this year, now is a great time. You can make your gift at greenfield.edu/give.

THE INVISIBLE COST

What does your donor journey look like right now?

STEP TWO: THE FORM

Please know that our merchant services processor has a limit of \$50,000 per transaction. Thank you.

\$ 100

I would like to support
Make a selection

* If restricted, please let us know what you would like the gift to support. (optional)

Your information

First name

Last name

Email

Country
United States

Address

City

State

ZIP code

 Give

Why is this how we do things?

1

**IT'S HOW WE'VE
ALWAYS DONE IT**

$\frac{1}{3}$ of Schools Said this

2

**THE MATH SAYS WE
SHOULD ASK QUICKLY**

$\frac{1}{3}$ of Schools Said this

3

**IT'S EASIER ON OUR
EXISTING SYSTEMS**

$\frac{1}{3}$ of Schools Said this

THE INVISIBLE COST

**What donors (and non-donors)
can't see that we're sacrificing**



**Who is Giving: Who
(specifically) made a gift?**



**What they unlocked: Did they
make progress toward
unlocking a match?**



**Why they Gave: What drove
that donor to give? What did
that gift mean to them?**

“Our giving page is just a form. You fill it out and that’s it. There’s nothing that makes you feel like you’re part of something.”

“The donation page is very dated. I would love something more modern, that’s even just more aesthetically pleasing for a donor.”

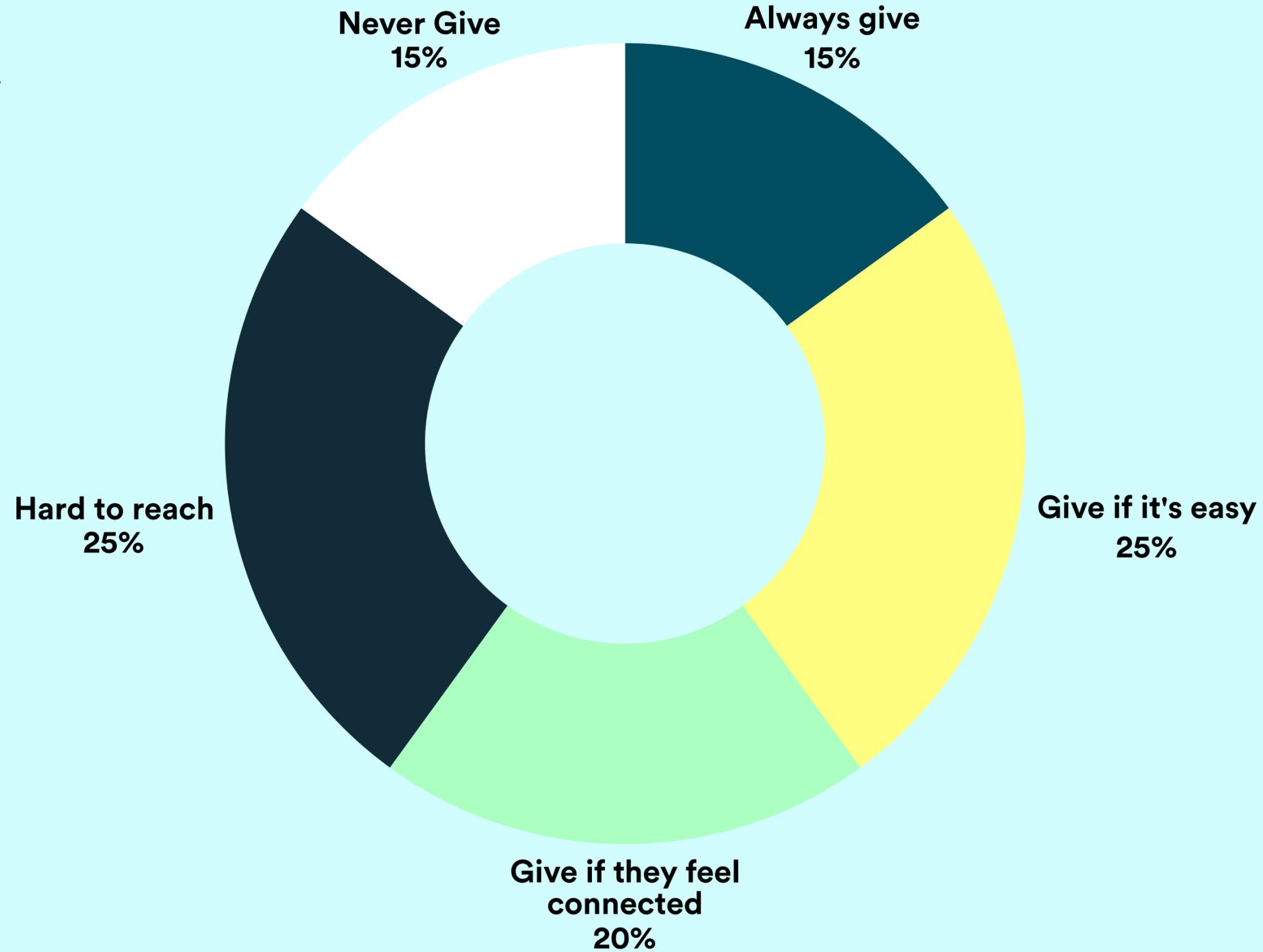
“It just feels like, this is your annual ritual, please give us money. There’s no energy to it.”

THE INVISIBLE COST

What are development leaders saying (in their own words)?

THE INVISIBLE COST

What does your community look like right now?



How are you reaching the rest of your community?

25% GIVE IF
IT'S EASY

Look to reduce
barriers to give

20% GIVE WHEN
CONNECTED

Look to make donors
feel more connected

25% HARD TO
REACH

Give donors a truly
unique experience

Part Two

What (actually) Moves

Donors

WHAT (ACTUALLY) MOVES DONORS

Finding your Next Steps

1 Reducing barriers to give

Make donors feel 10x more able to give than before.

2 Making donors feel connected

Lead with the landing page and bring Peer to Peer to FYE.

3 Giving donors a unique experience

Make every donor feel like you're having a 1:1 conversation with them.

YOUR SCHOOL IS POTENTIALLY MISSING

\$25,144
in annual fund revenue by not accepting modern payment methods

+113
additional donors your giving page isn't capturing

+22.5% PARTICIPATION LIFT	\$525,144 NEW AF TOTAL (EST.)	\$1,000 YOUR AVG GIFT TODAY	+5.0% REVENUE LIFT
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WHAT (ACTUALLY) MOVES DONORS

What is the cost of a lack of giving options?

See what you might be missing with our payment method ROI Calculator

20.0% Current participation rate	1,250 Estimated number of people in your community that prefer to give via modern payment methods	613 Total donors you could have reached this fiscal year	\$525,144 Annual fund total you could have reached this fiscal year
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Reducing Barriers to Give

- **Guiding Question: How can you make it feel 10x easier to give than before?**
- **Most schools with CRM giving forms miss out on significant amounts of participation and dollars due to a lack of payment options.**



CASE STUDY

Bringing Engagement to your Giving Form

- Reduce form drop-off by ensuring that you keep marketing your push throughout the form.
- Ensure that you prominently display the modern payment options you accept.



Your Donation

Amount

Greatest Need



By supporting the Area of Greatest Need, you are investing in the Tarrier experience for our students. This supports every aspect of what we are able to offer our students, and you are making a direct impact today!

Amount

Access & Financial Aid



We understand that financing an independent school education can be a significant expense. During the previous year, 40% of Charles Wright Academy students received financial aid grants totaling \$5.1

Making Donors Feel Connected

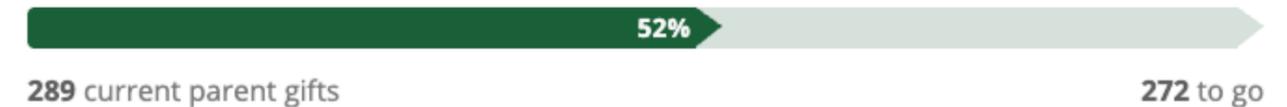
- When making FYE asks, most schools lead with the form, but donors want you to lead with the landing page.
- How can you bring peer to peer energy and engagement to your FYE asks?

CWA All-Family Participation Tracking



Make a gift to join other current families in going ALL IN to support the things that make Charles Wright so great! Can we get to 60% family participation?!

#ALLiN #GoTarriers  



Experiential Education

[GIVE NOW](#)

Experiential education programming is a hallmark of the CWA experience. Your gift helps Tarriers in all school...



Professional Development

[GIVE NOW](#)

Our teachers are qualified educators that foster a love of learning for our students. Your gift in support of staff...

CASE STUDY

Lead with the landing page to drive gifts

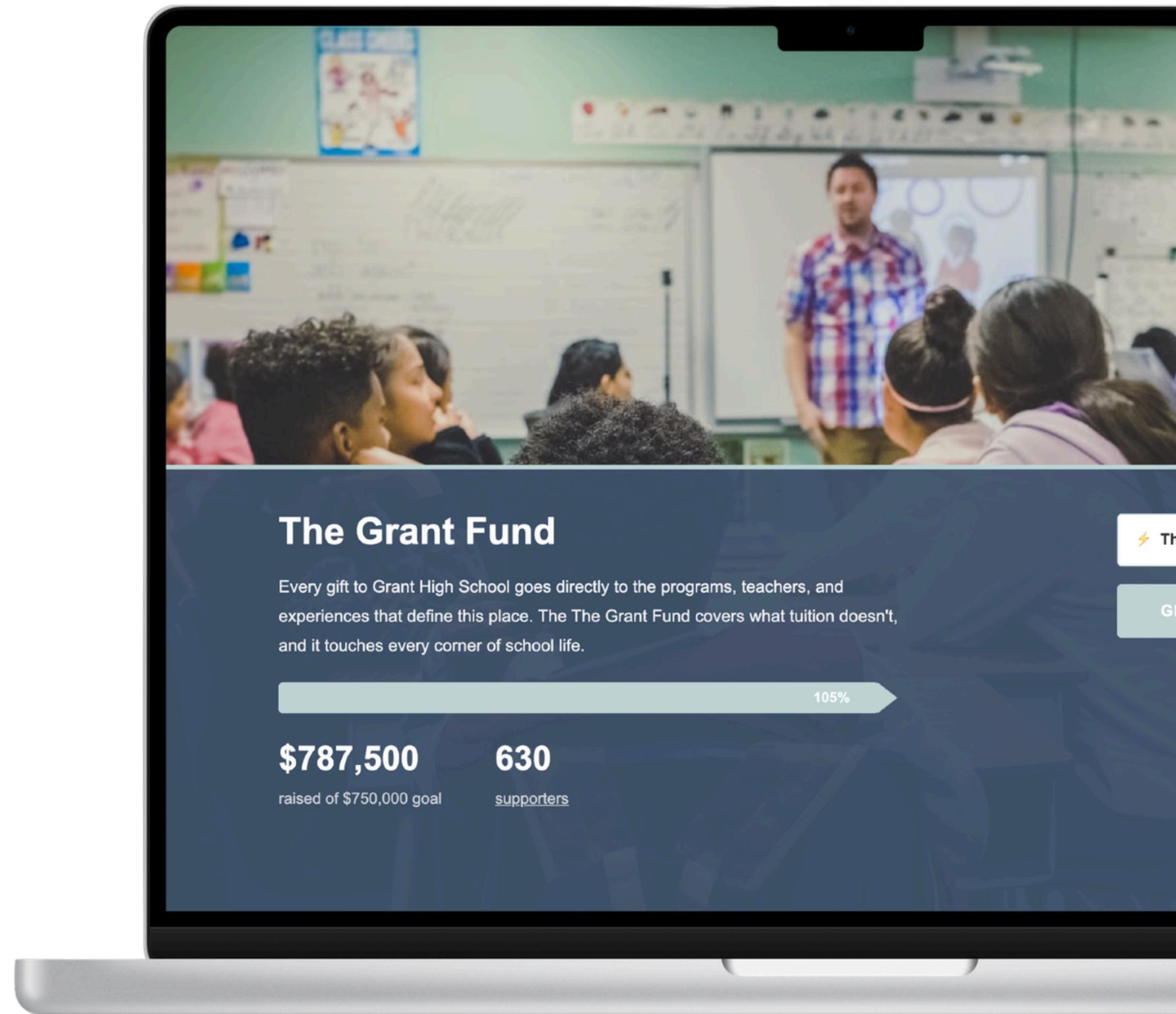
- Giving day tactics aren't just for giving days. How can you use peer to peer daily?
- Unrestricted giving is down 30%, how can you give donors the impact they want without increasing that number?



WHAT (ACTUALLY) MOVES DONORS

What should your landing page look like?

See what your FYE giving could look like if you led with the landing page



Giving Every Donor a Unique Experience

- How can you give every donor a unique experience with FYE giving (at scale?).
- Donors don't need complete 1:1 communication, but they do need to feel like they are only one of a few getting every message you send.

Display name ?

Volunteer 1

Email address ?

volunteer

@stchris.schooloutbox.com

Reply to ?

advancement@stcrhis.com

91 : 01 : 07 : 15
Days Hours Minutes Seconds

Hi {{recipient_first_name}},

It's {{volunteer_first_name}} {{volunteer_last_name}} from the Class of {{class_year}}. I'm helping coordinate our {{reunion_year}} reunion this spring, and I wanted to reach out personally because I saw you haven't registered yet.

So far {{registered_count}} **classmates** have already signed up, including {{peer_1_name}}, {{peer_2_name}}, and {{peer_3_name}}. You can see the full list of who's coming here: {{event_page_link}} The event is {{event_date}} at {{event_location}}. We're keeping registration simple - just takes 30 seconds to RSVP and you can update your details anytime.

Would love to see you there. Let me know if you have any questions!

Best,
{{volunteer_first_name}}

Part Three

Your 90 Day Playbook

YOUR 90 DAY PLAYBOOK

How are we structuring the rest of the year?

APR

Pick your target type of donor and build your launch plan.

MAY

Launch your landing page and target one attainable segment.

JUN

Convert deadline driven and lapsed donors.

1

**GIVE IF
IT'S EASY**

**Ensure that you offer
every modern
payment option**

3

**GIVE WHEN
CONNECTED**

**Leverage giving
buckets on your
landing page**

5

**HARD TO
REACH**

**Personalize appeals
at scale to increase
conversion**

2

**GIVE IF
IT'S EASY**

**Make your form
more compelling to
donors**

4

**GIVE WHEN
CONNECTED**

**Bring giving day and
peer to peer energy
to your annual fund**

6

**HARD TO
REACH**

**Leverage volunteer
names to attract
fence sitters**

Poll Time!

**What group of your donors
are you looking to acquire
at FYE?**



Your Questions Pt. 1

Would love to hear compelling ideas for reaching out to donors who rarely give but engaged with us during a Give Day campaign with a “participation” gift but have larger capacity.

- Denice from Breck School

What's the best way to engage alumni in spring pushes? Particularly if you're a newer school with alumni that skew younger.

- Jessica from The Wellington School

What are the best ways to segment donors and segment your asks in order to achieve the highest ROI?

- Nathan from Hill-Murray School

Your Questions Pt. 2

What medium of messaging are you using for the last push? we're sending out tons of emails as we head into the last 9 weeks about spring events, re-enrollment/ new family welcoming, graduation, summer camp... how do you keep the final push from getting buried?

- Kamryn from Jacksonville Country Day School

How to be delicate with donor fatigue while still needing to meet your annual fund goal.

- Heather from Myrtle Grove Christian School