Cathedral Prep's 40% Annual Fund Increase: Strategy, Execution, and Results



Jimmy Smith
AVP of Development & Strategic Initiatives
Cathedral Preparatory School and Mother Teresa Academy

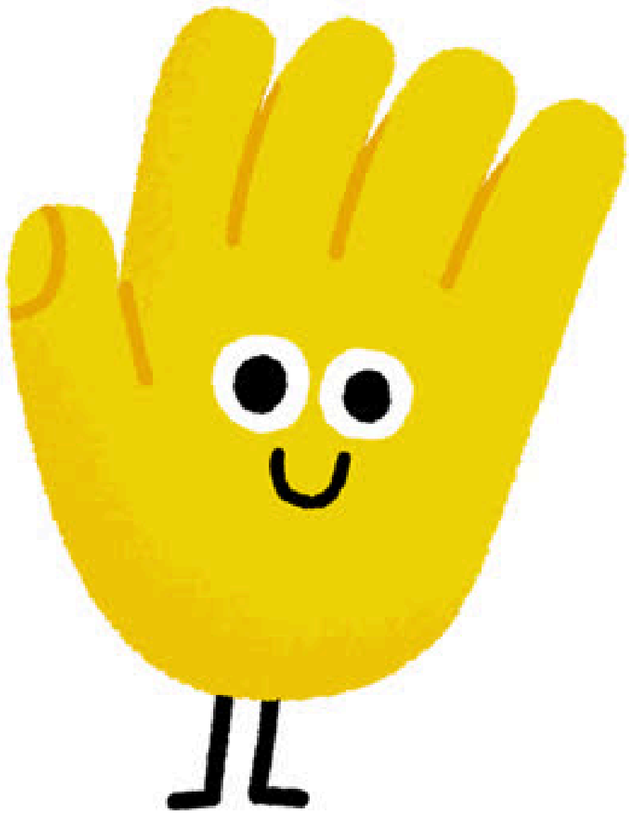


Holman Gao
Founder and CEO
Boost My School

June 29th, 2026

Let’s see who’s in the crowd!

- Segments
  - Upper school
  - Lower school
  - PK-12
- Advancement team size
  - 0-3 full-time team
  - 4-7 team
  - 8+ team



Discussion Topics

1. The Results: Best Annual Fund in 5 years!
2. The Need for Annual Giving Teams to Know Modern Marketing
3. FY26's Winning AF Strategy + Spotlight on Impact Week

About **Cathedral Prep**

Enrollment
581 Students

Development Team
5 Members

Grades
9th-12th



About

Boost and Cathedral Prep

Giving

- Annual Giving
- Giving Week
- Text Appeals

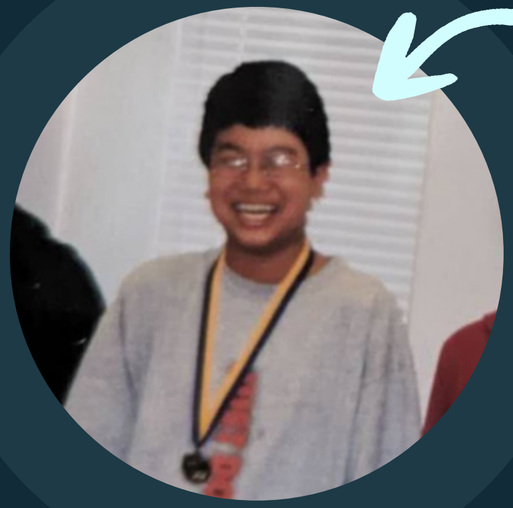
Events

- Gala
- Alumni Events/Reunions
- Golf



BOOST MY SCHOOL

The complete fundraising platform for K-12 advancement



HOLMAN GAO
FOUNDER & CEO

THEN

Founded when CEO was forced to donate to high school by check



NOW

Trusted by 300+ K-12 advancement teams

Newark Academy 1774

Western Reserve Academy Bicentennial 1826 2026

Christian Brothers Academy

The Thacher School Founded 1889

WHO IS BOOST FOR?

K-12 advancement teams big and small looking to do more with less.

GIVING

- Giving Days & Challenges
- Annual Fund
- Capital Campaigns

EVENTS

- Galas & Auctions
- Reunions & Alumni Events
- Golf Outings

See your 20+ potential use cases for Boost!

Polytechnic School
Pasadena, CA
15 person advancement team
$5M annual fund

Saint Philomena School
Portsmouth, RI
1 person advancement team
$0.5M annual fund



"Boost is the best solution for K-12 advancement in terms of support, functionality, budget."

Erica Ribeiro
Cushing Academy











Join a community of 300+ K-12 teams big and small who do more with Boost.

MEET OUR BOOST AMBASSADORS

Boost Ambassadors partner closely with our team, share what works at conferences, and co-host events to help advance the K-12 community.

Part One

The Results: Best Annual Fund in 5 years!

FY26 Annual Fund Results:



$710,000 Raised

41% YoY Increase!



1,950 Gifts

42% YoY Increase!



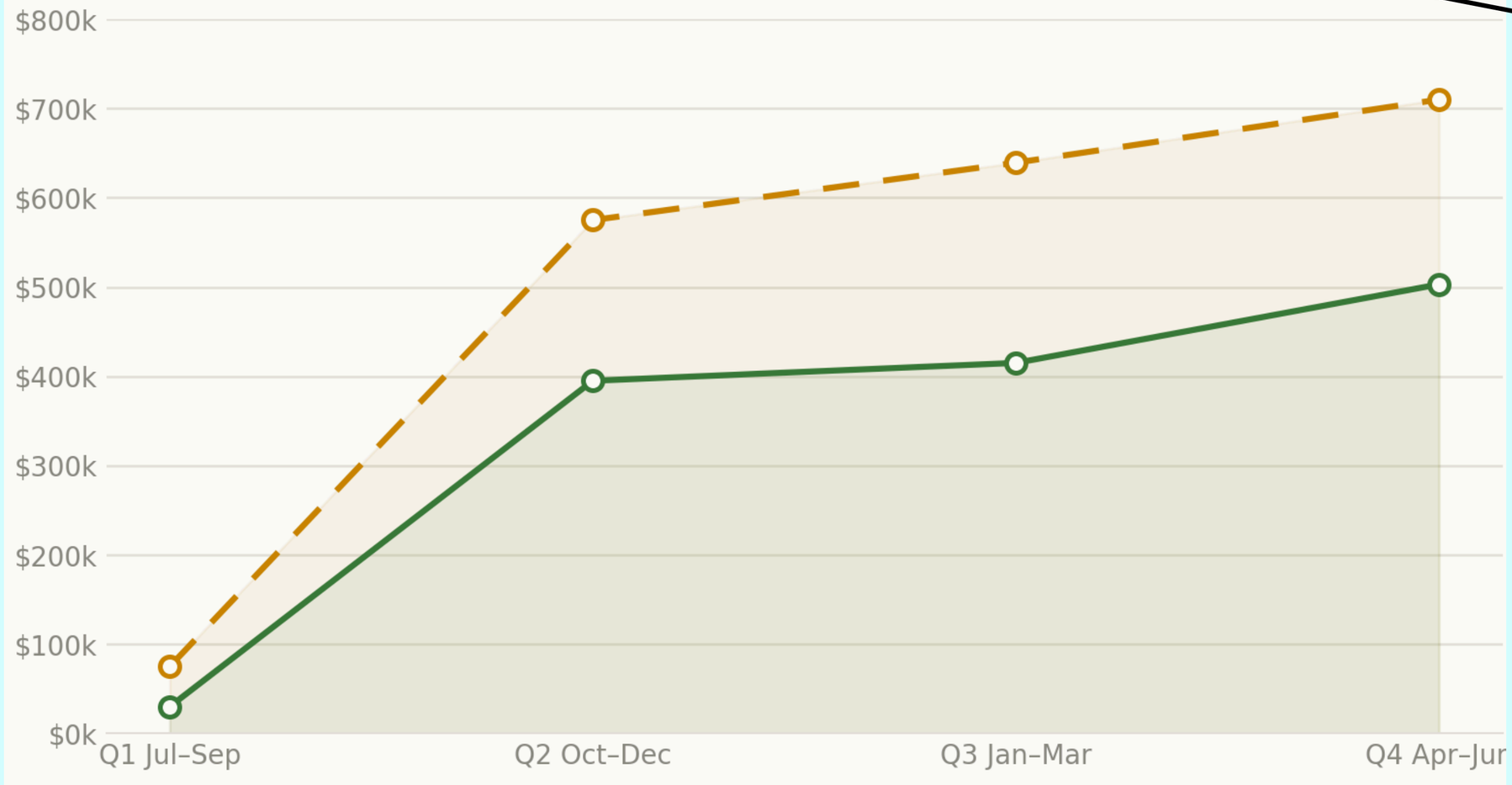
Best Annual Fund #’s in 5 years

Comparing FY25 to FY26 YoY

2024-2025 TOTAL
$502,980
All 4 quarters

2025-2026 TOTAL
$710,000
All 4 quarters

YOY LEAD (Q4)
+$207,020
↑ 41% ahead



National Avg. Growth Is 2-3%

The Old Way (FY25)

- Minimal strategic planning/outreach
  - Inconsistent donor outreach
  - Limited mailers
  - Limited texting
- No defined goals for mailings, texts
- Basic social media
  - Simple 90/60/30-day reminders for Fall Giving Day



Revenue goal ideology was more:
“It would be nice to achieve this number”

What Changed in FY26?

- **Strategic office re-alignment of AF efforts**
- **Evaluated key needed changes**
  - **Rebrand Giving Day -> Impact Week**
  - **Increase target audience/multi-channel**
- **Added Boost: “Expert advisors in the field”**



BOOST TIP

Less can be more. Pick 1 to 3 high-impact bets each quarter and go deep on them.

Part Two

The Need for Annual Giving Teams to Know Modern Marketing

[Not So] Fun Fact

For every email you send,

your donors receive

10+ emails

from other nonprofits!



Our Philosophies on Marketing

- Marketing is a skill that can be learned
- “Marketing blends science with art”
    - Data analysis + community understanding



Marketing and Fundraising Success Go Hand in Hand

- **Understand the ROI of your outreach**
  - **Channels: Email, Mail, Text, Social Media**
  - **Segmented Messaging**
  - **Strategic Timing**
  - **Different voices: staff, volunteers, etc**



BOOST TIP

Multi-layering is the easiest way to make your outreach feel diversified.

Using a multi-layered communication plan

Multi-layered voice: Who is sharing?

- Advancement team
- Parents, alums
- Students
- Faculty/staff
- Head of School
- Board of trustees
- Alum council

Multi-layered messaging: What is being shared?

- Page elements
- Their ‘why’
- Donor stories
- Class competitions
- Challenges

Multi-layered channels: How is it being shared?

- Email
- Text message
- WhatsApp
- Direct mail
- Social media
- In person

Texting vs. Emailing

TEXTING

READ RATE

90%

text
read within 3 minutes

CONVERSION

1.1%

text
per send

AVERAGE GIFT

$3.48

text
per send

EMAILING

22%

email
read within 1 hour

<0.5%

email
per send

$1.10

email
per send

On Average, Texts are the Best Way to Reach Every Segment

	Most Checked			Least Checked
Gen Z 2000-2012	Texts	Social Media	Email	Mail
Millennials 1981-1999	Texts	Email	Social Media	Mail
Gen X 1965-1980	Email	Texts	Mail	Social Media
Baby Boomers 1946-1964	Mail	Email	Texts	Social Media

Part Three

FY26's Winning Annual Fund Strategy

A National View: Participation



Alumni participation rates are down 2% YoY nationally for independent schools



Schools are sending more emails than ever before, up 12% from 2024

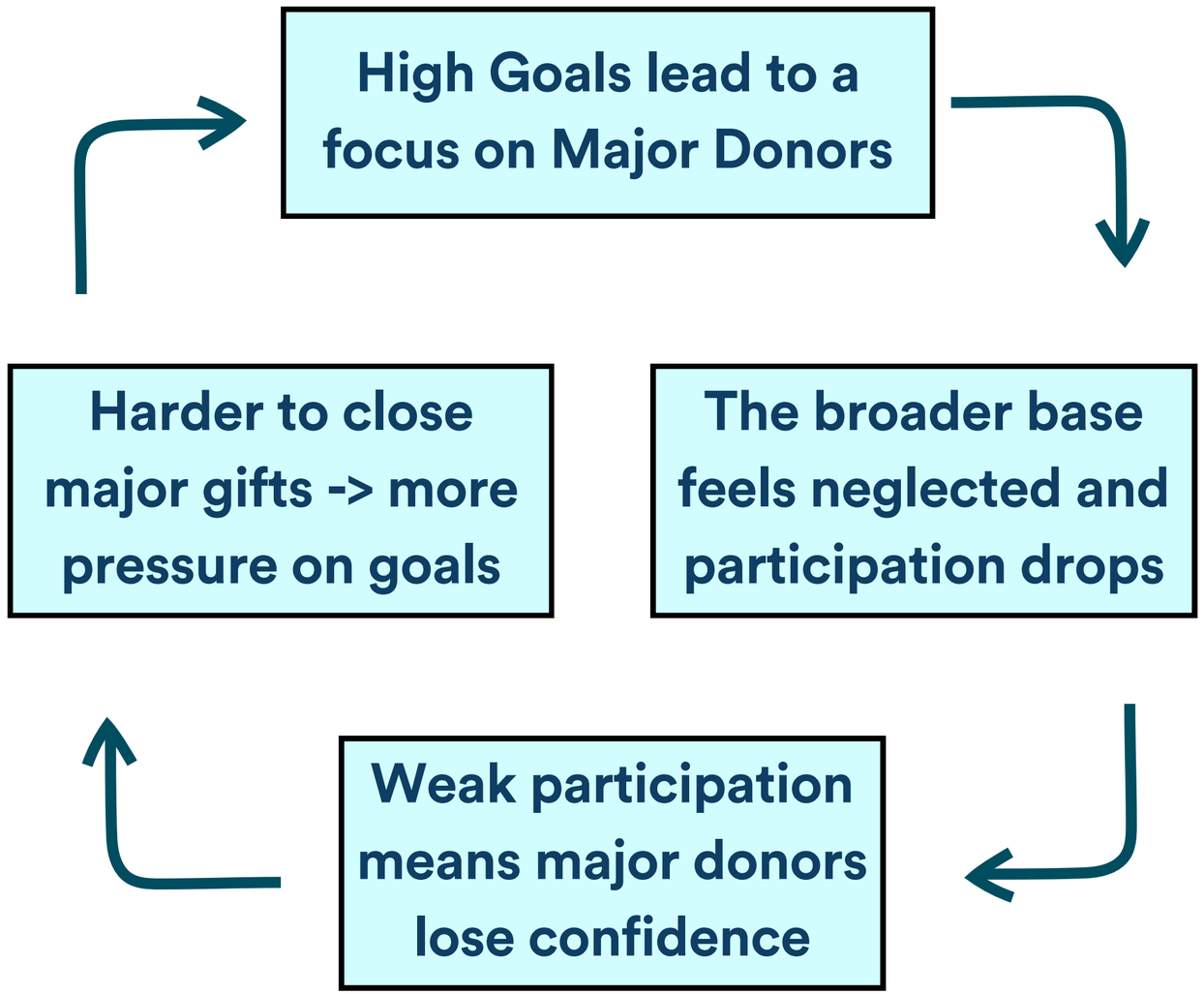


Attributed revenue per email fell 11% YoY from 2024 → 2025.

Why Major Donors Can’t Replace High Participation

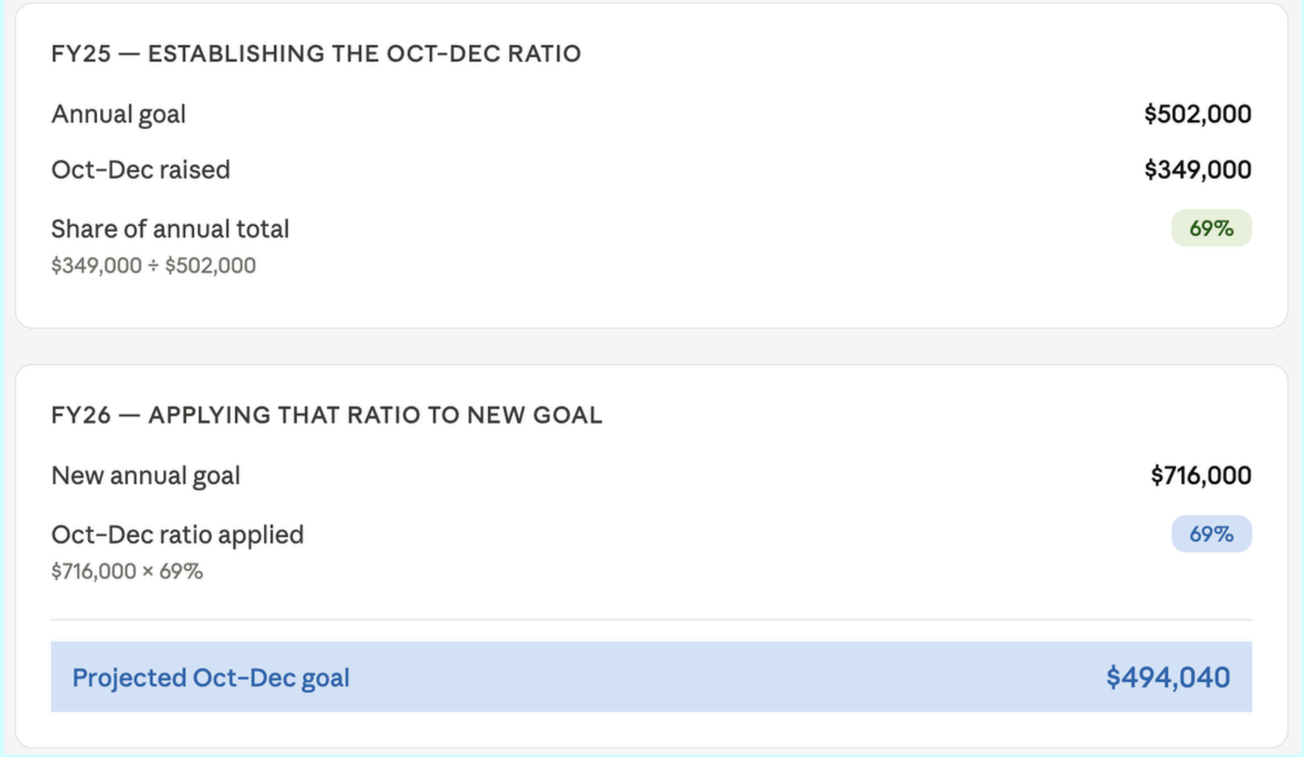
- When your appeals don’t convert, participation suffers + compounds over time.
- As participation falls, major donor prospects become harder to convert

→ Participation numbers are a leading indicator of annual fund sustainability



Re-Establishing Our Baseline: Strategic Goal Setting

- **Strategic quarterly goals:**
  Set proportional goals based on historical patterns
- Understand what months you raise the most



- Oct-Dec Results: $494,000

Planning

July:
Strategic Planning

August:
Strategy meetings with team

September:
Development of Appeal Letter + Video Content

Promotion

October 27th:
Appeal Sent Out

November 3rd:
GD save the date video: email + social media post

November 13th:
President of School video to promote Impact Week

Impact Week

November 17th-21st

- Impact Week
- Daily emails/social posts

Thursday 20th:
Giving Day

- Comms at: 8 am, then 12, 4, 8 pm

Friday 21st @ 12 pm

- Thank you + initial results

Wrap-Up

December 17th:
Final GD Results shared

Fall Appeal: 16 Segmented Groups

Donors & giving	Engagement & events	School & leadership	
All 25–26 donors Current fiscal year	**Event attendees** Last 7 years	**Current board members** All active seats	**Past board members** All prior service
All SYBUNTs Last 7 years	**Podcast guests** All appearances	**Committee members** Adv, Alumni, Fac, Fin, Nom	**President's Leadership Society** Past 10 years
Corporate partners Business Alliance, last 3 yrs	**Academic Quarter speakers** Session speakers	**President HOF members** All inductees	**Athletic HOF members** All inductees
Major gift notes Past MGO account notes	**Magazine features** All featured individuals	**Current parents** All enrolled students	**Parents of Class of '24 & '25** Class of 2024 & 2025

BOOST TIP

Combine standard school segments (e.g. current parents, LYBUNTs, SYBUNTs) with segments unique to your school (e.g. student groups, athletics, spirit classes).

Fall Appeal: Ask Amount via Segment

- Formula: Avg. of last 5 AF gifts, rounded up to whole number
- Excluded outlier gift
  - Endowments, corporate matches, major one-time gifts
- New donors: $50 minimum ask for giving day
- Non-AF Donors (Q4): “a gift that is meaningful to you”

Jimmy personally reviewed every ask amount over $500

Success Rate = High! Many donors gave at or above suggested amount.

Fall Appeal Commitment Form

The Fund for Excellence

NAME 1
NAME 2
ASK AMOUNT: $XXXX

The President's Leadership Council & Giving Societies

The President's Leadership Council honors the proud legacy of Cathedral Preparatory School & Villa Maria Academy. Donors to the President's Leadership Council include all individuals, companies, and foundations that make a gift of $1,500 or more during in the 2025-2026 school year.
Donors at this level are invited to a reception hosted by the President in August/September 2026.

President's Leadership Council

Legacy Society: $15,000 – $24,999

Trustees Society: $10,000 – $14,999

Benefactors Society: $5,000 – $9,999

President's Society: $1,500 – $4,999

Friends Giving Societies

Champions Society: $500 – $1,499

Patrons Society: $250 – $499

Partners Society: $100 – $249

Friends Society: to $99

Young Alumni ('15 to present) who contribute $500 or more are also included as members in the President's Leadership Council.

My total commitment to ***The Fund for Excellence*** is $_____.

Fall Focus: Impact Week

- Revamped Appeal
  - Strategic asks
  - Segmented + expanded outreach
- Comprehensive texting strategy
- Daily Themes
- Live Giving Page



Daily Themes

Monday:
Mission Monday

Tuesday:
Student Impact

Wednesday:
Faculty
& Academics

Thursday:
Giving Day

Friday:
Appreciation
Day









Giving Day Comms Plan

Text, Email & Social Media at 8:00am

Official Giving Day launch email with video and a clear call-to-action to give by Dr. Chris Clark.

Email & Social Media at 12:00pm

Includes live update on gifts and $ by Kevin Smith.

Email & Social Media at 4:00pm

Includes live update on gifts and $ by Dr. Chris Clark.

Email & Social Media at 8:00pm

Official Giving Day launch email with video and a clear call-to-action to give by Dr. Chris Clark.

Impact Week: Texting

$42,608 Raised

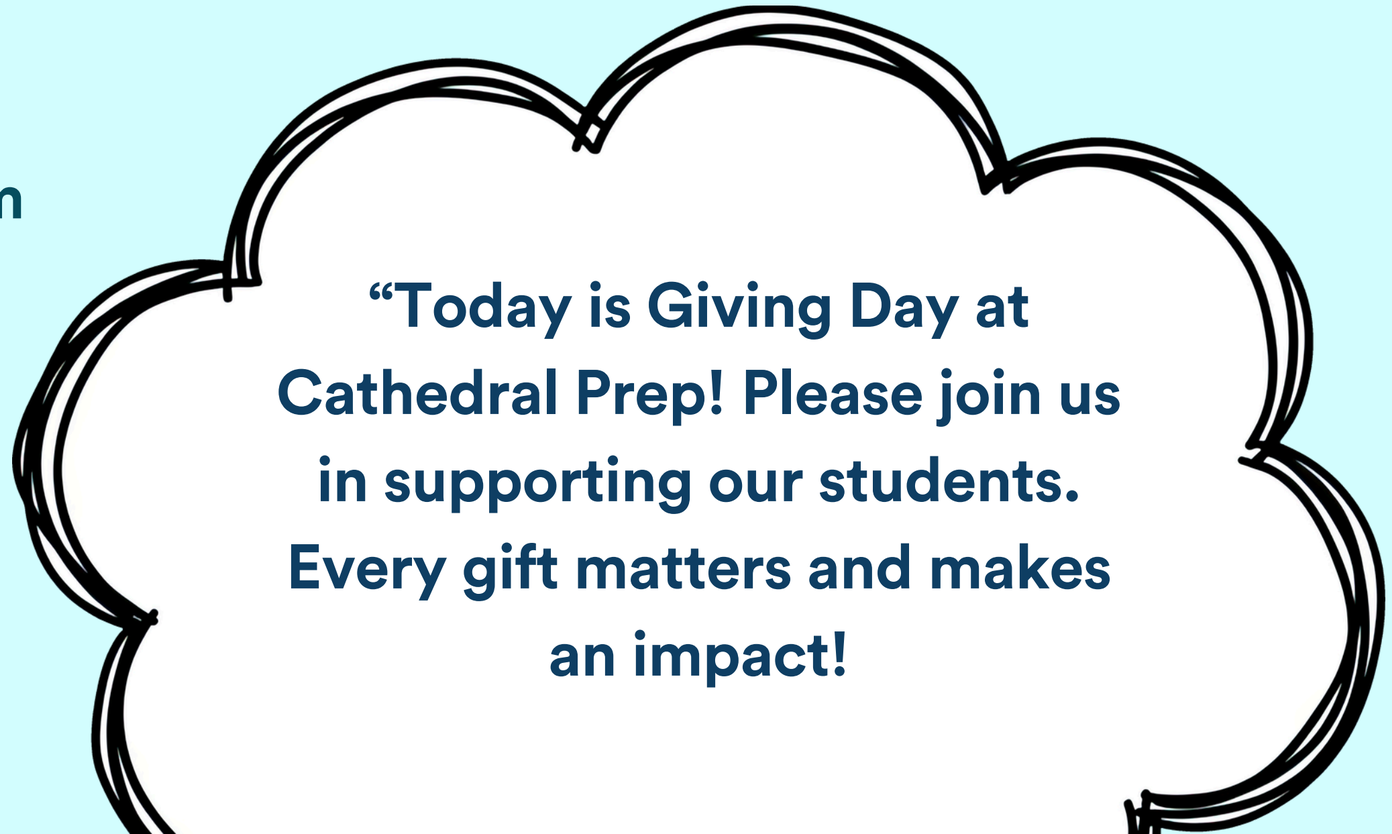
102 Gifts

26,546 Texts

1.5% Click Rate

3 Sends:

- 1st Day of Impact Week: 12:30 pm
  - 3,877 Texts, $5k
- Giving Day: 8 am
  - 19,000 Texts, $19k
- Giving Day: 7 pm
  - 3,669 Texts, $18k



Impact Week: Email

Dear Cathedral Prep Community,

We are halfway through Giving Day, and the generosity we've experienced this morning has been incredible! Alumni, parents, faculty, and friends are coming together to support Cathedral Prep, and we are well on our way to reaching our goal. We have already received **271** gifts totaling **$149,299** in support of Cathedral Prep, and it's only lunchtime!

We still need your help to make the biggest impact possible. Your gift this afternoon can inspire others to give and help us finish Giving Day even stronger.

Every dollar raised today supports:

- Tuition assistance for families who dream of a Cathedral Prep education
- Exceptional academics that prepare students for college and beyond
- Faith formation and leadership opportunities that shape students into men and women of vision

Join us now and be part of this special day before the clock runs out.

Thank you for helping make this Giving Day one of the most impactful in Cathedral Prep's history. Together, we are shaping the future.

With gratitude,

Kevin Smith

President



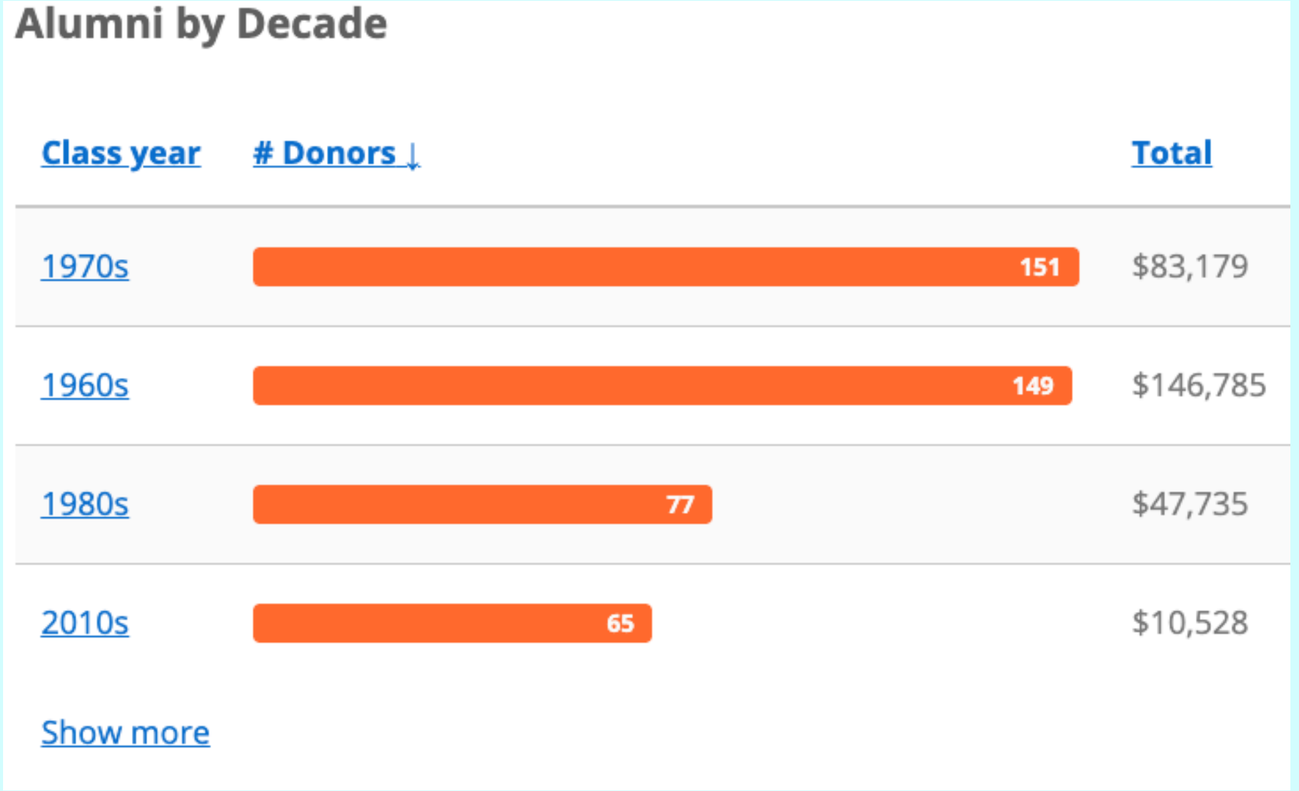
Real-time Giving Page

- User Experience
- Modern Payment Methods
- Interactive Features:

  Leaderboards and challenges

BOOST TIP

Tie your leaderboards, challenges, and comments/stories to your segments for a further personalized experience!



Link to Live Page

Impact Week Results

Dear Cathedral Prep Community,

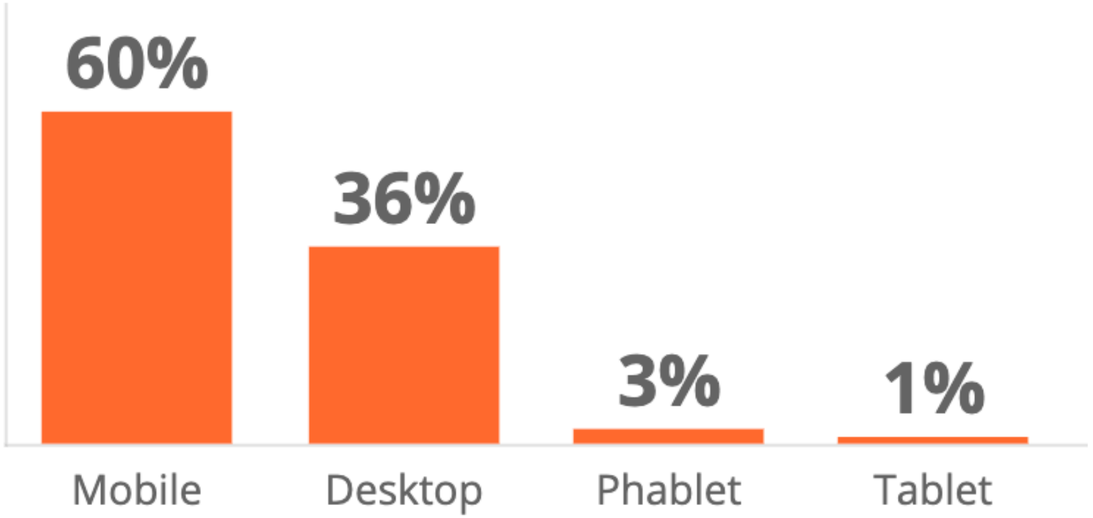
We are pleased to share the final results of this year's Giving Day, and more importantly, to thank you for the extraordinary generosity you showed our students and school.

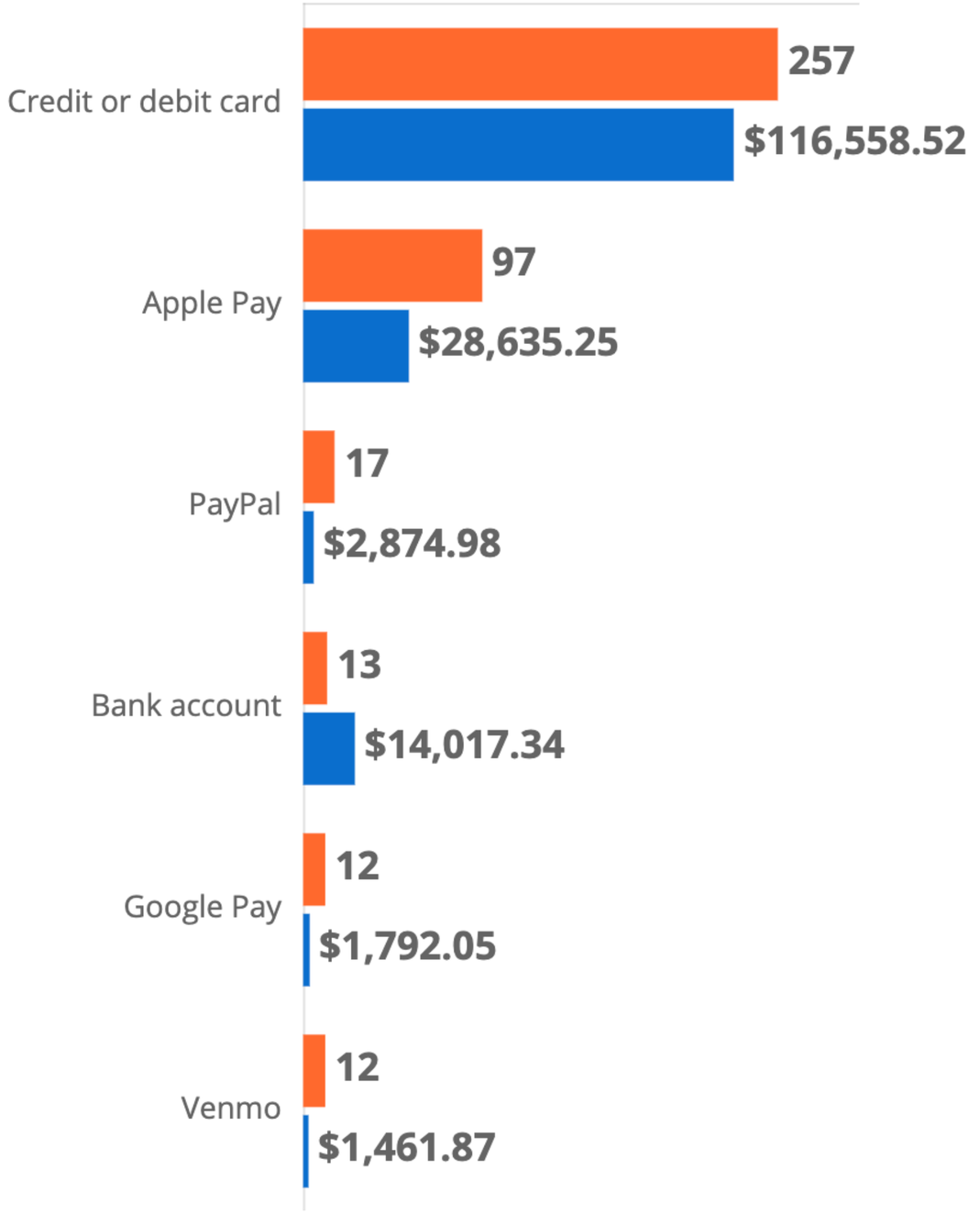
Because of your support, we raised **$528,927** through **737 gifts**, a powerful demonstration of the commitment our alumni, parents, faculty, and friends have to Cathedral Prep. Your participation made this Giving Day a true success!

Other Impact Week Stats

$5,858.22

Extra amount raised to cover fees





Next Step: Q3 Winter Mailers

Who: SYBUNTS from last 5 years (3,000 people)

Dear Alumni and Friends,

Our names are Matthew Oblich and Alonna Hudson, and we are both proud members of the Cathedral Prep Class of 2026. We are grateful for the opportunity to share what this school has meant to us and why your support matters.

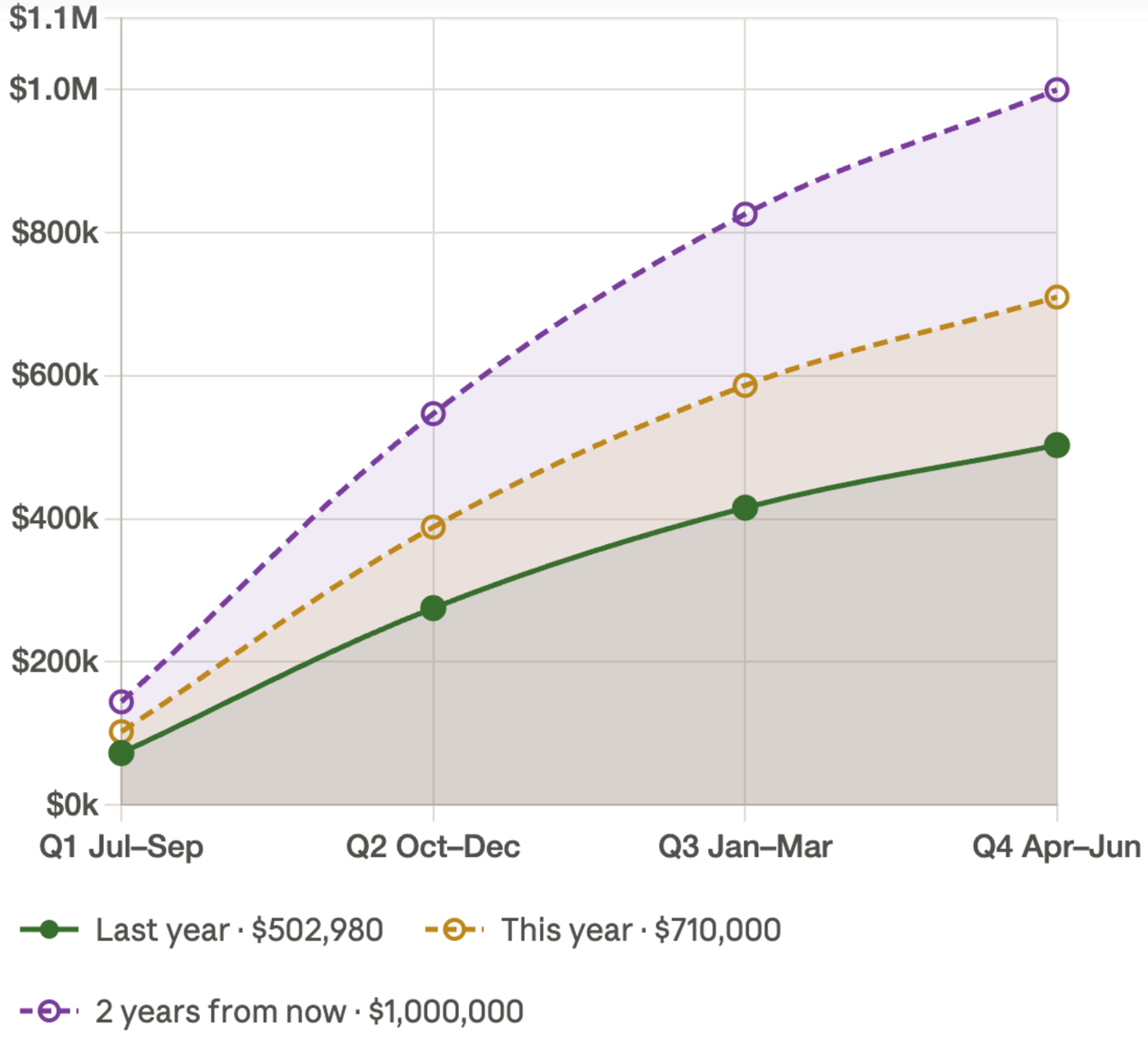
Cathedral Prep has become more than a school to us. It is a community that has shaped our faith, our character, and our sense of purpose. At Prep, faith is lived out every day. Through prayer, reflection, and example, we have been challenged to grow spiritually while striving for academic excellence. Matthew found a place where faith became personal and real, strengthened by mentors who encouraged growth and leadership. Alonna found a community of welcome and respect where faith was demonstrated through compassion, service, and integrity.

Spring Mailers: 14 different letters

- Timing: May
- Anyone who hasn’t given to AF yet this year (9,600 people)
- Letters from people relavent to segment

Segment	Mailing Quantity	Text Quantity
Villa 1950-1969	654	375
Villa 1970-1982	952	350
Villa 1983-1992	894	243
Villa 1993-1999	137	133
Villa 2000-2009	224	234
Villa 2010-2019	482	303
Prep 1950-1969	728	595
Prep 1970-1979	794	523
Prep 1980-1989	1626	404
Prep 1990-1999	308	272
Prep 2000-2009	332	386
Prep 2010-2019	634	715
Organizations	238	NA
Non-Alumni	1673	1475
TOTAL-	**9676**	6008

What’s Next for Prep?



- Year 2 of 3 to goal of $1M
- July: Team reviews results and sets goals
- Leaning more into AI tools
    - ChatGPT, Claude, Ask Boost

What's Your 1 Takeaway?

What's 1 thing you want to bring back to your school and try?

