

**Keewaydin Foundation**  
**Executive Summary of Demont Associates Campaign Planning Service**  
**November 2022**

**CONFIDENTIAL for Board, Service Oversight Committee, and Service Participants**

In Summer 2022, Keewaydin Foundation (KF) engaged the services of Demont Associates, fund-raising counsel, to conduct a Campaign planning service to determine the readiness and capacity to raise **\$16,500,000** in private support for the following:

1. Scholarships for Middle Income Families (\$5,500,000)
2. Capital Improvements (\$2,500,000)
3. Spendable Preservation Fund (\$2,500,000)
4. Staff Excellence Fund (\$3,000,000)
5. Annual Fund (2023-2025, \$2,000,000)

Demont conducted 60 confidential conversations with prospective donors and leaders including current and former Board members, parents, and grandparents, alumni, staff (full-time/summer, current/former) and foundation representatives. After benchmarking the results with similar clients who conducted successful campaigns over the past five decades, and the previous Keewaydin Forever Campaign, Demont determined that **\$15M to \$20M** could be raised for KF's identified priorities if the proposed **recommendations** are followed:

**Proceed with a Comprehensive Campaign with Key Strategies for Maximum Success**

1. **Conduct** Volunteer-Led, Staff-Supported Campaign
2. **Stress** "\$20M in Priority Needs" in Quiet Phase (2022-2024)
3. **Set** 3-Yr. Solicitation Period: Oct 2022 through Sept 2025
4. **Allow** 5-Year Pledges (6 tax years, payable by Sept 2028)
5. **Develop** Strong Case for Support with More Specificity, Updated Estimates and Urgency
6. **Complete** 7-Year Financial Proforma to Show 10-Year Impact
7. **Announce** Public "Goal" AFTER 80% of Commitments Secured
8. **Emphasize** Need for Unrestricted Support of Campaign Priorities
9. **Amplify** Comprehensive Communications Driven by Staff/Advised by Volunteers
10. **Empower** 75-100 Volunteers/Solicitors Across 6 U. S. Regions
11. Personally **Engage/Inform** Top 150-200 Supporters/Advocates Before Solicitation
12. **Utilize** Fitting Gift Recognition Opportunities to Express Gratitude for Impact of Gift
13. **Conduct** Additional 20-24 Planning Interviews in Quiet Phase for Perspective and Advice
14. **Measure** Other Goals:
  - a. Number of Volunteers Recruited/Trained
  - b. Number of Gifts Received
  - c. Number of Silver Paddle Members
  - d. Unrestricted/Budget-Relieving Gifts
  - e. Donor Engagement/Stewardship Contacts

**Campaign Investment and Staffing Recommendations**

14. **Invest** 8% to Raise \$13M to \$18M in New Private Support (2023-2025)
15. **Secure** Average of 40% of ED's Time on Campaign (*with exception of summer season*)
16. **Secure** Average of 50% of DOD's Time (*excluding Annual Fund*)
17. **Secure** Average of 50% of new Campaign Office Manager's Time
18. **Partner** with Camp Directors/Associate Directors as Advocates and Askers
19. **Partner** with Experienced Firm: Strategic Counsel & Campaign Co-Direction
20. **Build** Upon a Strong and Sustainable Culture of Philanthropy

## **Summary of Service Findings**

By compiling both quantitative and qualitative data through the interview process, Demont Associates has identified primary strengths as well as challenges that KF can continue to address and overcome through a capital campaign.

### **Strengths relating to a successful campaign identified by respondents** (Descending Order of Mention)

- Programs & Transformational Program Experience
- Staff, Leadership & Resiliency
- Nature, Environment & Location
- History, Traditions & Values
- Loyal & Generous Constituency

### **Challenges relating to a successful campaign identified by respondents** (Descending Order of Mention)

- Change: Economic, Cultural, Social, Climate
- Competition: Other Camps/Summer Schedules/Technology
- Financial/Rising Operational Costs
- Leadership Succession & Staffing
- Covid-19 Pandemic
- Communications

### **KF planning service responses exceeded or met Demont's benchmarks in 14 key assessment areas:**

- Public image of Keewaydin;
- Understanding of the needs for the campaign priorities;
- Agreement with the proposed plan to meet the needs;
- Support for a private fund-raising campaign as the primary method to fund the needs;
- Attainability of the \$16.5M needs tested, and the larger gifts (3 levels) to achieve these needs;
- Philanthropic priority of the proposed campaign among individuals and foundations;
- Willingness of service participants to give to the campaign;
- Willingness of volunteers to work on the campaign;
- Willingness of participants to assume leadership roles on the campaign;
- Quality and ability of the interviewee pool; and
- Proposed timing of the campaign.

### **KF fell short of Demont's DPB in just three areas:**

- Perceived receptivity of constituents to proposed campaign;
- Attainability of the Top Gift (\$3M); and
- Keewaydin Foundation Board's fund-raising strength

## **KF Board Action**

As a result of the Planning Service report, the Board recently voted **to approve and accept the recommendations** from Demont Associates. Demont began service days in late November 2022 and is working with staff and volunteer leaders to prepare for a successful campaign.