

CHESHIRE
ACADEMY

Segmentation Guide

The Importance of Segmenting Fundraising Appeals in Educational Philanthropy

CHESHIRE GIVES 2025 CASE STUDY



Thank YOU!



Thank you for attending our session at CASE DI/DII Conference. We hope our Giving Day creativity inspired you to think outside the box (while still staying on brand). As a thank you, we're sharing a segmentation guide to help you craft your communications for your next giving day. Send us a message, add us on LinkedIn, and be sure to share your next Giving Day with us!

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What Is Segmentation?

During Cheshire Gives 2025, segmentation was not an add-on or afterthought—it was a core strategy that directly contributed to surpassing our participation goal. With a target of 250 donors, Cheshire Academy finished the campaign with 383 donors, exceeding the goal by more than 50%. Segmentation allowed us to speak to donors as people with distinct relationships to the school, not as a single audience.

Segmentation is the practice of dividing your donor and prospect base into smaller, more meaningful groups based on shared characteristics—such as relationship to the school, giving history, interests, capacity, or engagement. Instead of sending one generic message to everyone, segmentation allows you to tailor your appeals so they speak directly to who the donor is, why they care, and how they are most likely to engage.

At its core, segmentation is about relevance. It asks a simple question: Who is this donor to our institution, and what do they most need to hear right now?

Why Should You Segment?

Why it mattered for Cheshire Gives 2025

Segmentation isn't a "nice to have." It's one of the most effective ways to increase response rates, strengthen donor relationships, and build long-term loyalty—especially in educational philanthropy, where donors often feel a deep personal connection to the institution.

When appeals are personalized and donor centric:

- Donors feel seen, not solicited. Messages that reflect a donor's lived experience—whether as a parent, alum, or grandparent—signal respect and understanding.
- Engagement increases. Segmented emails consistently outperform broad sends in open rates, clickthrough rates, and conversions.
- Trust is strengthened. Relevant messaging reinforces that the institution is thoughtful, intentional, and stewarding relationships—not just dollars.

- Giving becomes more meaningful. Donors are more likely to give (and give again) when they understand how their support aligns with what they value most.

In short: generic appeals ask for money. Segmented appeals invite partnership.

For Cheshire Gives, segmentation helped us:

- Activate multiple audiences simultaneously without message fatigue
- Reinforce belonging across parents, alumni, and friends
- Create momentum early and sustain it throughout the campaign
- Turn participation into a shared community goal—not just a fundraising ask

How Much Segmentation Is Too Much?

Segmentation is often perceived as complicated or time consuming, but it doesn't have to be. Even modest adjustments can have an outsized impact. Changing one or two lines of copy—or the voice behind the message—can dramatically shift how an appeal is received.

Simple segmentation examples:

- Leadership donors: A message authored by the Head of School or Board Chair, focused on vision, strategy, and long-term impact.
- Parents: A parent-to-parent voice that speaks to the lived experience of supporting a student today.
- Alumni: Alumni to alumni messaging rooted in nostalgia, shared tradition, and the enduring value of the education received.

From there, segmentation can deepen:

- Affinity groups (athletics, arts, international students, DEI initiatives)
- Class years or reunion cycles
- First time donors vs. loyal annual supporters
- Volunteers, mentors, or advisory board members

The key point: donors *do* notice segmentation. It signals care, effort, and intention—and it does not require reinventing the wheel each time.

How Can I Segment Without a Big Office or a Lot of Time?

How we approached this at Cheshire Academy

Even the leanest advancement teams can—and should—segment. Start simple and build over time.

Three Foundational Segments Every School Should Use

Though we expanded to 15 segmentations, we started with the following three segments as our base.

1. Current Parents: Focus on immediacy and impact. Parents are invested in the present day student experience. Appeals should emphasize how giving directly supports students, faculty, and programs *right now*.
2. Alumni: Lead with connection and legacy. Alumni respond to stories that reflect continuity—how today’s students mirror their own experience, and how their support sustains what made the institution meaningful to them.
3. Friends / Others: This group may include grandparents, past parents, community members, and donors without a formal affiliation. Messaging should focus on mission, outcomes, and the broader value the institution brings to the world.

From there, we looked at which groups we could break down even further (leadership donors, town scholars, alumni by decades, etc). Each received tailored messaging while still reinforcing a unified campaign goal.

Practical Tips for Small Teams

- Use the same core appeal but adjust the opening paragraph and closing call to action
- Swap the signer or author line to match the audience
- Segment by relationship first; refine by behavior later
- Let your CRM or email platform do the heavy lifting—most already support basic segmentation

Segmentation is a practice, not a project. Start where you are, use what you have, and improve as you go.

Final Thoughts & Key Takeaways

Segmentation is ultimately an expression of respect. It acknowledges that donors are not interchangeable—and that their relationship with your institution matters.

When educational institutions take the time to tailor their messaging, they don't just raise more money. They build stronger communities, deeper trust, and a culture of philanthropy that lasts.

Remember:

- Segmentation does not require more content—just more intention
- Participation-based campaigns benefit enormously from audience-specific motivation
- Voice matters: who delivers the message can be just as important as the message itself
- Even light segmentation can unlock significant gains in donor participation

Sources & Recommended Reading

(Selected to support best practices discussed in this case study)

- Burk, Penelope. *DonorCentered Fundraising*. Cygnus Applied Research.
- CASE (Council for Advancement and Support of Education). *Fundraising Fundamentals* and research briefs on donor engagement.
- Blackbaud Institute. *Charitable Giving Report* and donor behavior studies.
- Bloomerang. *The Beginner's Guide to Donor Segmentation*.
- AFP (Association of Fundraising Professionals). Articles and webinars on personalized fundraising strategies.
- Mailchimp & HubSpot nonprofit benchmarks on segmented vs. nonsegmented email performance.

For a Deeper Dive into Segmentation at CASE DI/DII, Check Out This Session with Cheshire Academy Alumna, Jenny Dupre '02:

Right People, Right Time: Email Personalization Strategies

Wednesday, February 18, 2026, 3 – 4 p.m.

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