

More

Developing a school-wide approach to fundraising

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Philanthropy and Schools – Mutual Understanding

- Philanthropy is first and foremost about **Relationships**
- Schools are about **Education**
- A “culture of philanthropy” is an attitude that embraces relationship building. The key is:

*Instilling a culture where everyone is focused on the mission, vision and core values of your School **AND** working towards fostering essential relationships with constituents*

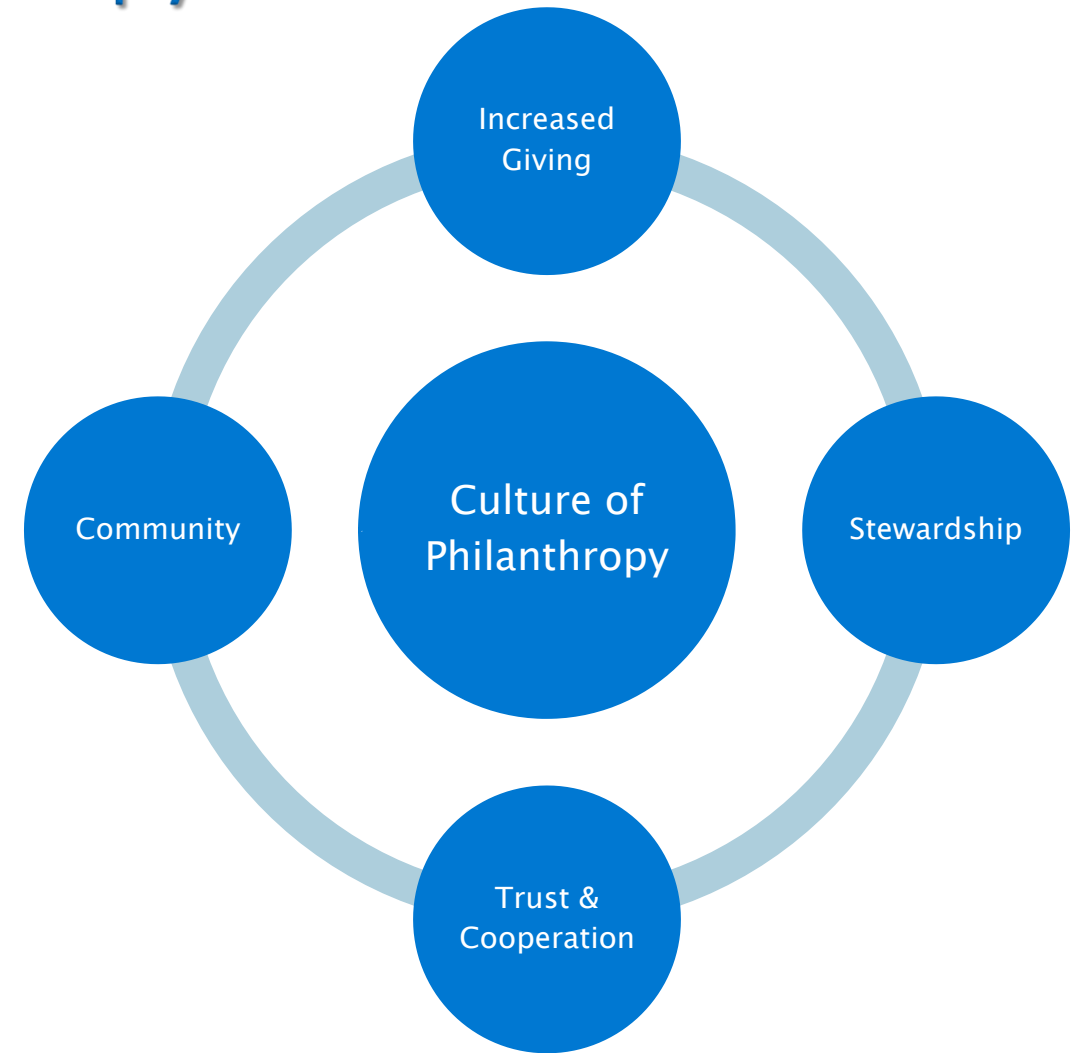
A solid culture of philanthropy is when...

- Everyone at your School understands and values philanthropy and the Development programme
- It is generally understood how philanthropy helps the School achieve its mission and vision
- Stakeholders are naturally inspired to help and **play a part in achieving** Development goals within their roles and responsibilities



Benefits of a culture of philanthropy

- Increased giving from all sources (including staff and Governors)
- More personalised and effective stewardship of donors resulting in increased giving and retention
- More trust and cooperation amongst internal stakeholders resulting in greater ease in accomplishing work and improved efficiency
- A more cohesive community of stakeholders who enjoy positive experiences from their involvement in the Development process...
.....**a virtuous circle**



An novel way of raising funds...



"Splendid new laptop, Miss Frimley! How on earth did you raise the funds?"

What is this elusive culture?

Attitude



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graph TD; A[Attitude] --> D[All seamlessly underpinned by process, professionalism and communication]; B[Understanding] --> D; C[Behaviour] --> D;
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Understanding

Behaviour

All seamlessly underpinned by **process, professionalism** and **communication**

Indicators that your School may not have embraced a culture of philanthropy

- Fundraising is crisis driven, or reactive, or worse, apologetic
- Development activities are viewed as costs, not investments
- The responsibility for fundraising rests with a very few people
- Large gifts are often a surprise
- Donors don't feel as though they are valued "insiders"
- Very little intentional donor stewardship
- Events take centre stage rather than a comprehensive Development and engagement programme
- There are various fundraising activities going on through the School, with little management

Attributes of Schools with a strong culture

- Development Director reports to the Head of School
- Philanthropy is one of the criteria for Governor selection ('give or get')
- Board is willing to share responsibility for Development goals
- Philanthropy is conspicuous and evident in the School's strategic plan
- Development is viewed as a revenue (not a cost) center
- Everyone understands that the School is worthy of support and must raise funds
- Most recognise the need to identify new supporters and acknowledge and thank current supporters
- Donors are valued and communication with them is deep and personal

Attributes of Schools with a strong culture

- Most can answer basic questions about the School's goals, budget, opportunities and challenges
- The Board of Governors shows leadership in the annual fund, major gifts or a campaign
- The Head of School understands his or her role in the Development effort and uses every opportunity to inform constituencies about the importance of philanthropy
- The Development staff is proactive in explaining the School's fundraising priorities to all constituencies



Stakeholders & Constituencies

- Head of School
- Current Governors
- Current staff, teaching and non-teaching
- Current parents (and other family members)
- Alumni
- Current pupils
- Former parents / families, staff and Governors
- Local people, community groups and organisations
- Business, industry and universities locally and beyond



Head's role

- Ensure that fundraising is **understood** and **respected** as a programme
- Model the culture of philanthropy and be **actively engaged**, including as a donor
- **Create space** for constant focus: staff orientation, education and ongoing discussion
- Ensure **reciprocity** and **respect** between academic department heads, senior management and Development staff
- Provide Governors and Development Committee / volunteers with **tools and guidance**
- Meet regularly with Development Director and provide **input and regular review** of the Development Plan

Governor's role

- Become **educated** during recruitment and induction about the importance of philanthropy and the Case for Support
- Sign off the **Development Plan** and regularly include Development as an agenda item at their meetings
- Focus primarily on **cultivation and relationship building**- all coordinated by Development Director or Head
- Share **responsibility** for meeting Development goals
- Feel personal **accountability** for displaying overt engagement with and encouragement of Development
- Become an **effective partner** with the Head and Development Director to ensure sustainability and health of the programmes
- **Lead by example**, thus donate regularly to the School

Be clear what you expect from your Governors



Staff's role

- Understand the **overall goals, plans and strategies** for the Development department
- Be able to **articulate** the School's Case (and where appropriate, be willing to help shape the case)
- Act as an actively **engaged ambassador** to help cultivate alumni, parents and other supporters
- Help to **identify possible donors** given their close work with parents and pupils
- **Lead by example**, thus donate regularly to the School
- Bursar should **align with and work closely** with the DoD to ensure they understand the School's financial situation and plans and that he / she understands the Development process

Current Parent's role

- **Appreciation** of the role philanthropy has played in the School historically and currently plays
- Participation as a **volunteer** at events, or, if appropriate, as part of a Development Committee
- Act as an **ambassador** to help cultivate alumni, other/new parents and other supporters and be able to articulate the School's Case
- Make **introductions** to others in the wider community and/or other potential supporters either through business connections or other organisational connections
- Become a **regular donor** to the Annual Fund
- **Assist** current students with any fundraising events and encourage leaving gift participation

Alumni's role

- **Appreciation** of the role philanthropy has played in the School and in their pupil experience
- Be willing to act as an **ambassador** to help cultivate other alumni, current pupils and other supporters and be able to articulate the School's Case
- Make **introductions** to others in the wider community and/or other potential supporters either through business connections or other organisational connections
- Be active as a **regular donor** to the Annual Fund
- Participate as a **volunteer leader** with the School, Alumni Association, Development office, pupil mentoring, etc.
- Provide helpful **feedback** to the Development professional about their experience while at the School and as an alumnus that could be used in fundraising materials or to help improve upon the messaging and programmes

Current Pupil's role

- **Appreciation** of the role philanthropy has played in the School historically and currently plays
- Organise fundraising events to **support the School**
- **Volunteer** for the School's Development department at events and in the office, and, more generally, act as ambassadors
- **Participate** by making a leaving gift, and help to encourage their peers to do the same

Requirements for an improved culture of philanthropy

- Clear and compelling vision that includes urgency and is reinforced by shared, stated values
 - **The vision is the reason the institution needs to achieve a culture of philanthropy**
- Champions who model behaviour and understand, embrace and act on their roles
 - **Board provides philanthropic leadership**
 - **Head is committed to philanthropy**
- Internal transparency in finances and asset management
- Investment in Development staff and programmes to build relationships and provide donor care
 - Development is viewed and valued as a mission-aligned programme of the School**

Break the vision down into specifics (and make a compelling case)



"Basically, what you're saying is I get a box of chocolate chip cookies and the sixth grade class gets a field trip to Tuscany?"

Next steps to building a culture of philanthropy

Ensure these are in place, or focus on the steps needed to get these core elements in place

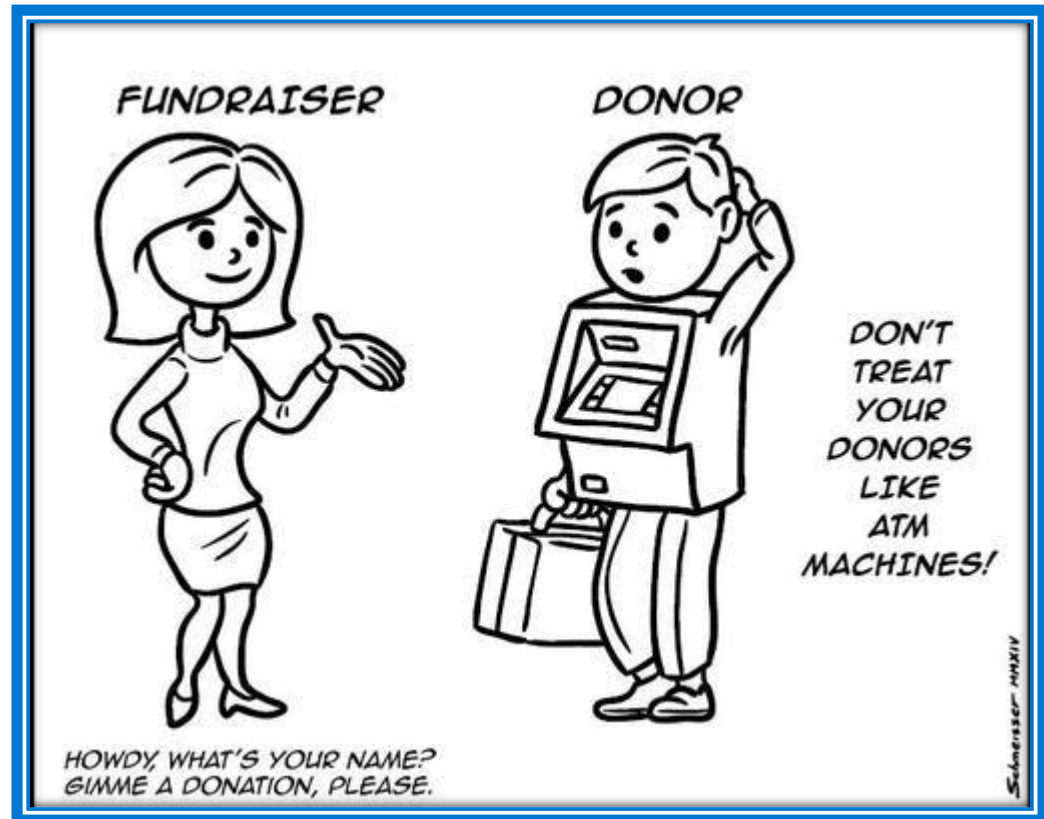
- An approved and endorsed Development plan with concrete, measurable goals which take account of current strengths and weaknesses and clearly aligns with the School's vision
- A Head who is overtly committed to and personally involved in fundraising
- Most people at the School (across all positions) acting as ambassadors, engaging in relationship building and able to promote philanthropy and articulate the Case for giving
- All internal stakeholders understand and believe in the role of philanthropy and truly value donors

Next steps to building a culture of philanthropy

- An environment where building relationships with external stakeholders is viewed as being as important as reaching financial and contact targets
- All new policies and procedures regarding philanthropy are documented in order to institutionalise the new plan
- Organisational systems are developed and investment is made to support donors and the Development operation

- Don't treat Development and Alumni Relations as a 'bolt on' – don't place it in a silo

► *Fundraising is not an ATM machine*



Questions?

