

Beyond the benchmarking report – 3 steps for success

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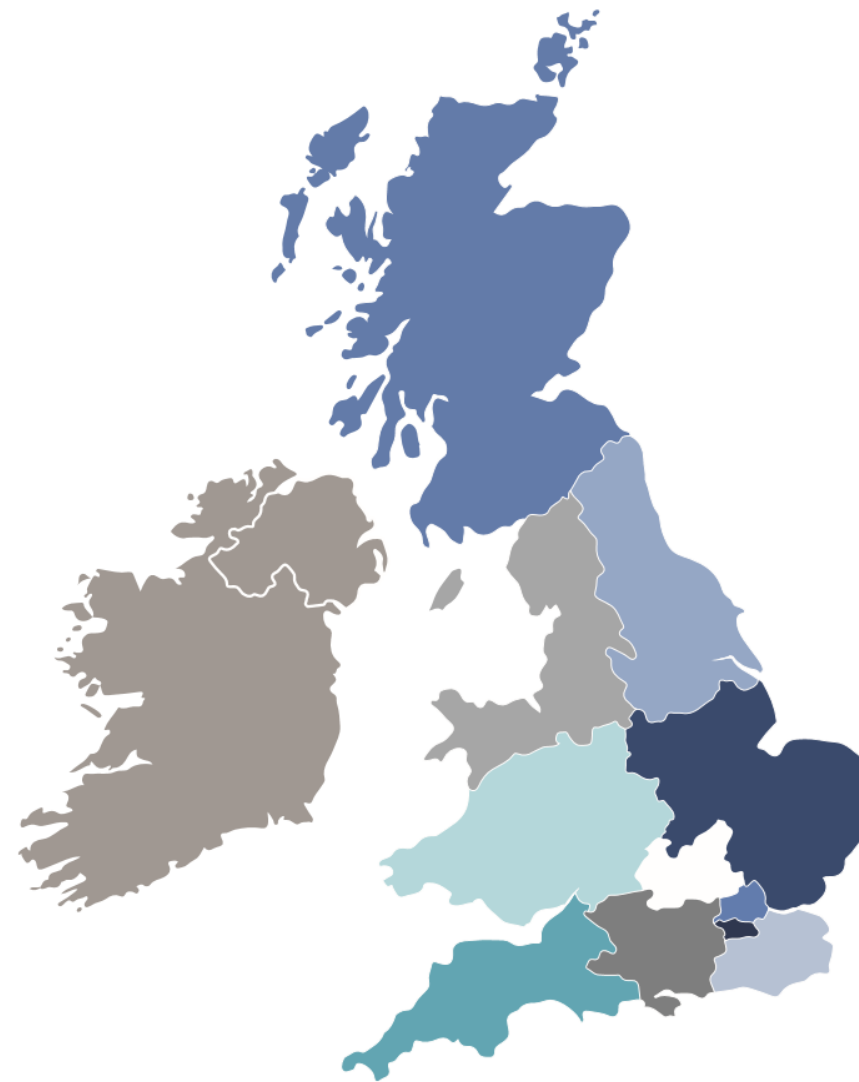
Chair: Isabella Bennett

Benchmarking Highlights



The Survey

- 181 schools took part
- Biggest educational fundraising survey in the UK
- Responses covered activity and results from September 2014 to August 2016
- 76% of schools reported philanthropic income, worth £172.5m



Not a member Schools participated:2
£162,796

Scotland Schools participated:16
£507,999

North East Schools participated:8
£317,649

North West Schools participated:12
£350,712

East Schools participated:19
£367,769

West Midlands Schools participated:10
£151,250

Thames Schools participated:10
£295,033

London Schools participated:14
£1,608,214

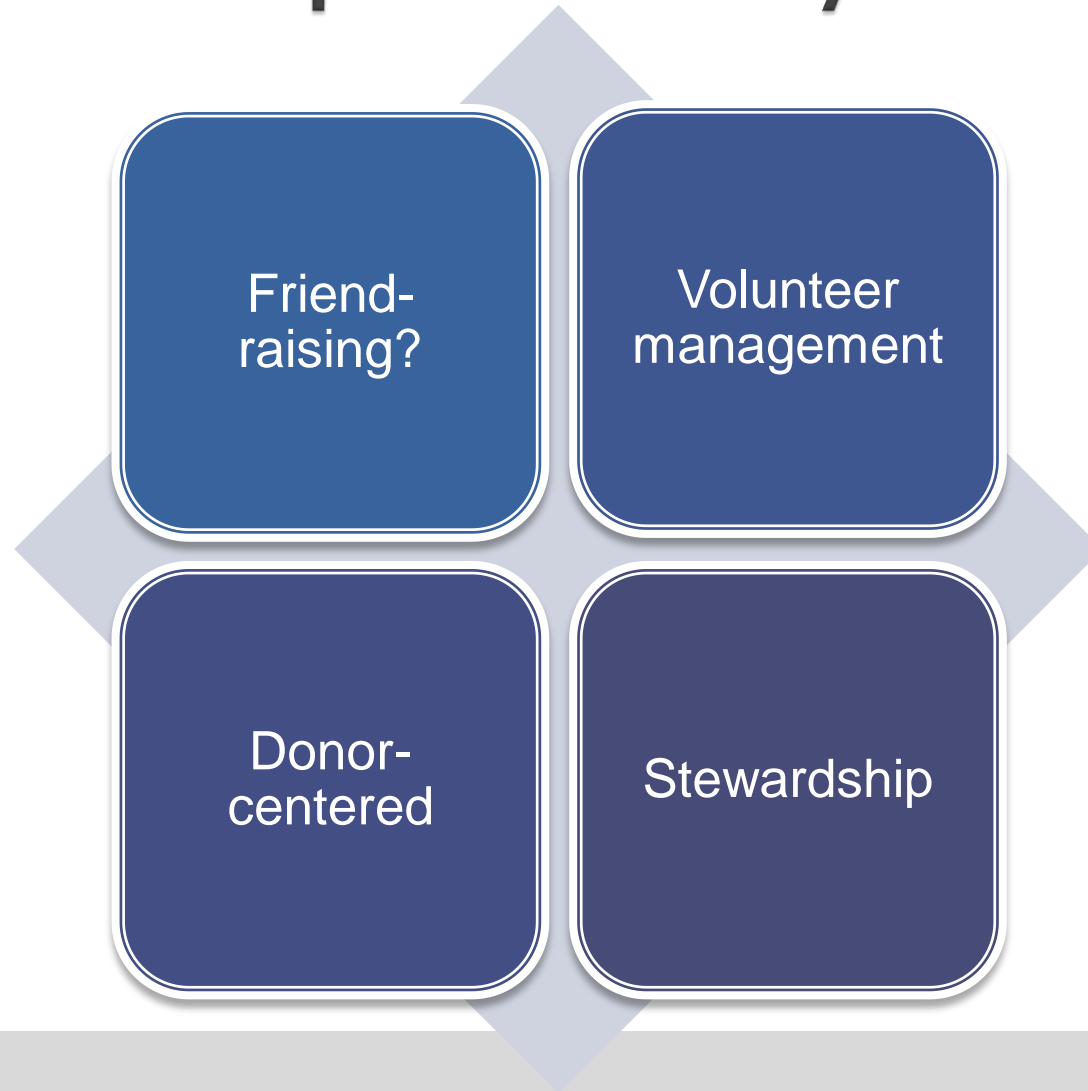
Surrey Schools participated:10
£486,283

South Central Schools participated:14
£1,060,053

South East Schools participated:10
£1,354,727

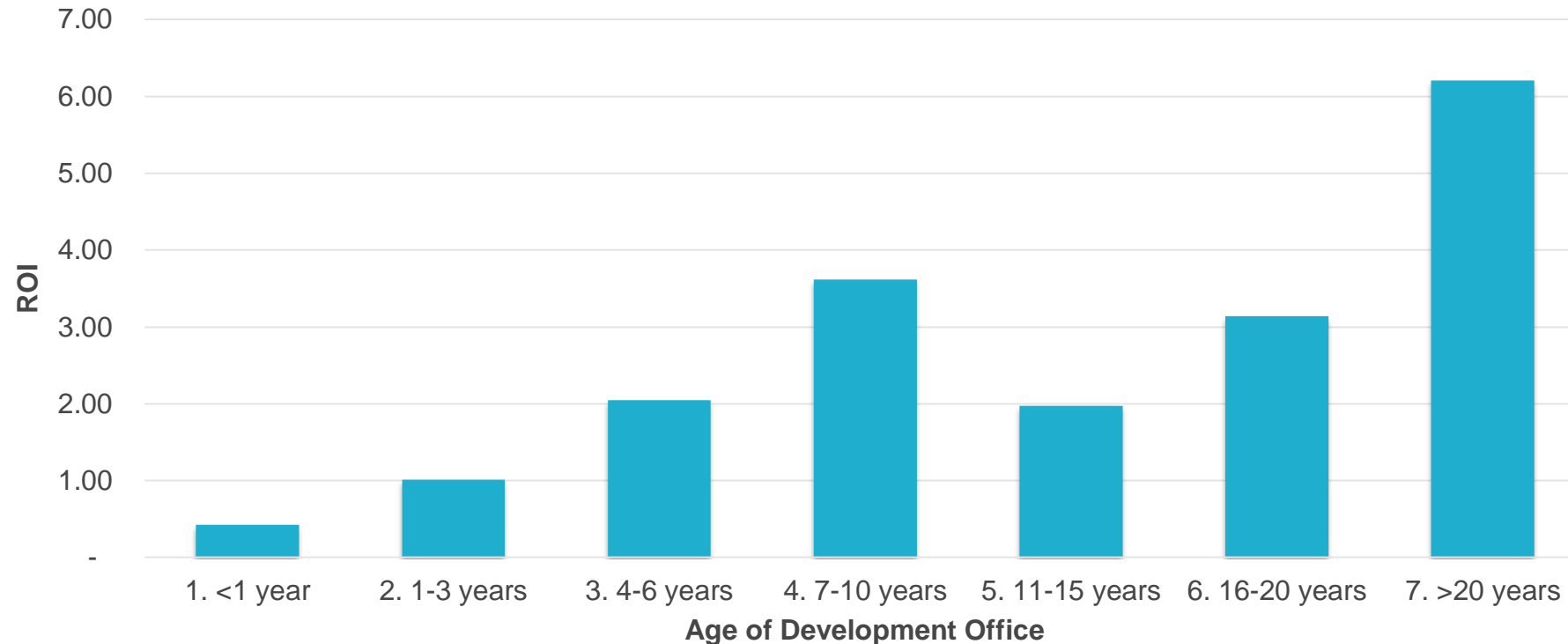
South West Schools participated:13
£328,011

#1. Relationships Are Key



#2: Time and Investment vs. ROI

Time + Investment = Increased Philanthropic income



#3. Manage Your Time

Majority of time spent on:	Average Annual Philanthropic income per school (£)
Major Gifts	2,465,911
Major Gifts/Regular Giving equally	843,970
Major Gifts/Regular Giving/Alumni Relations equally	598,673
Alumni Relations	422,021
Regular Giving	164,063
Other School Activities	74,427
Development Administration	15,885

#4. Major Gifts Matter

Five key takeaways for creating a step change in major gifts:

1. Major gifts take time and investment

2. Fundraising requires tools as well as dedicated staff

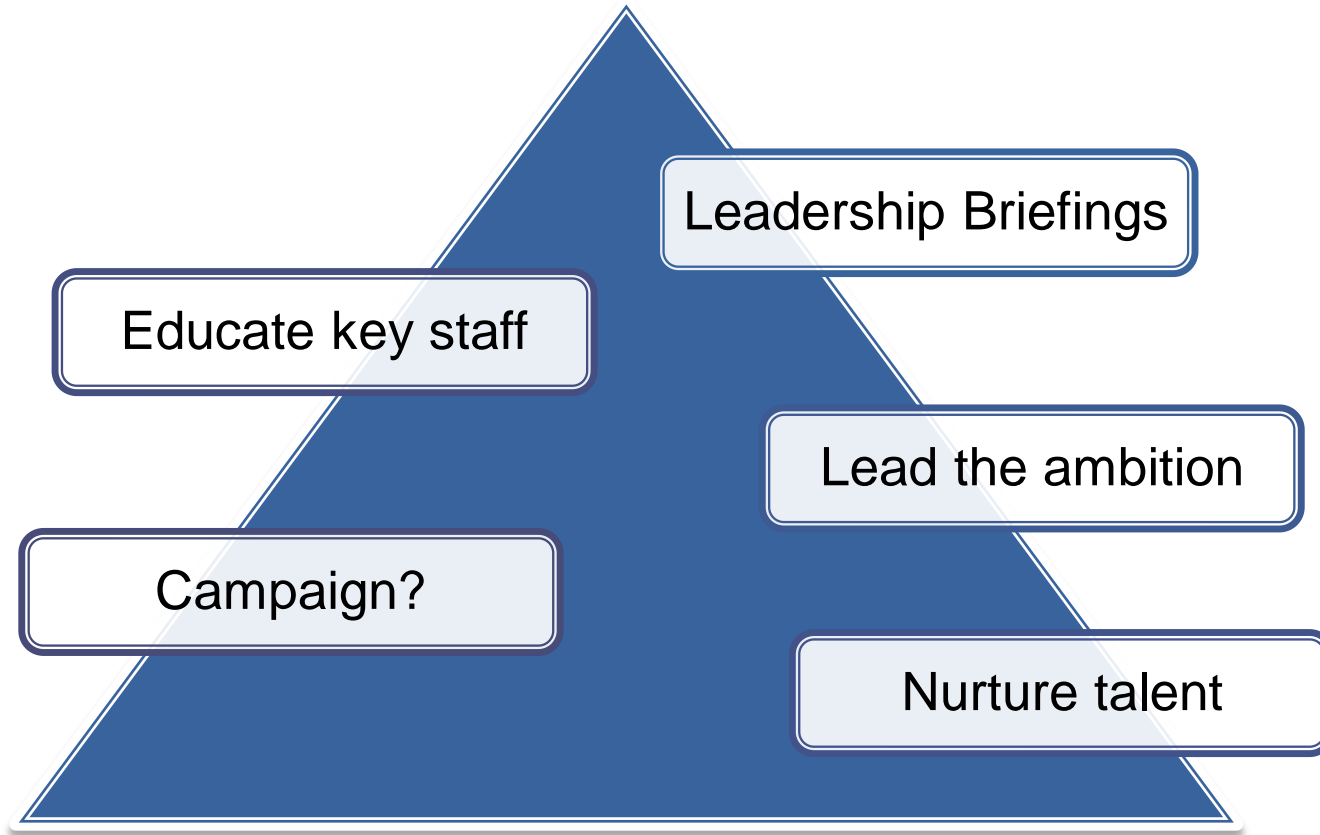
3. Leadership is important

4. Campaigns can elevate philanthropy, but planning and timing are key

5. Major gift fundraising can be a risk



#5. Create Change



BUT: No such thing as the average school

Using the Benchmarking to make change

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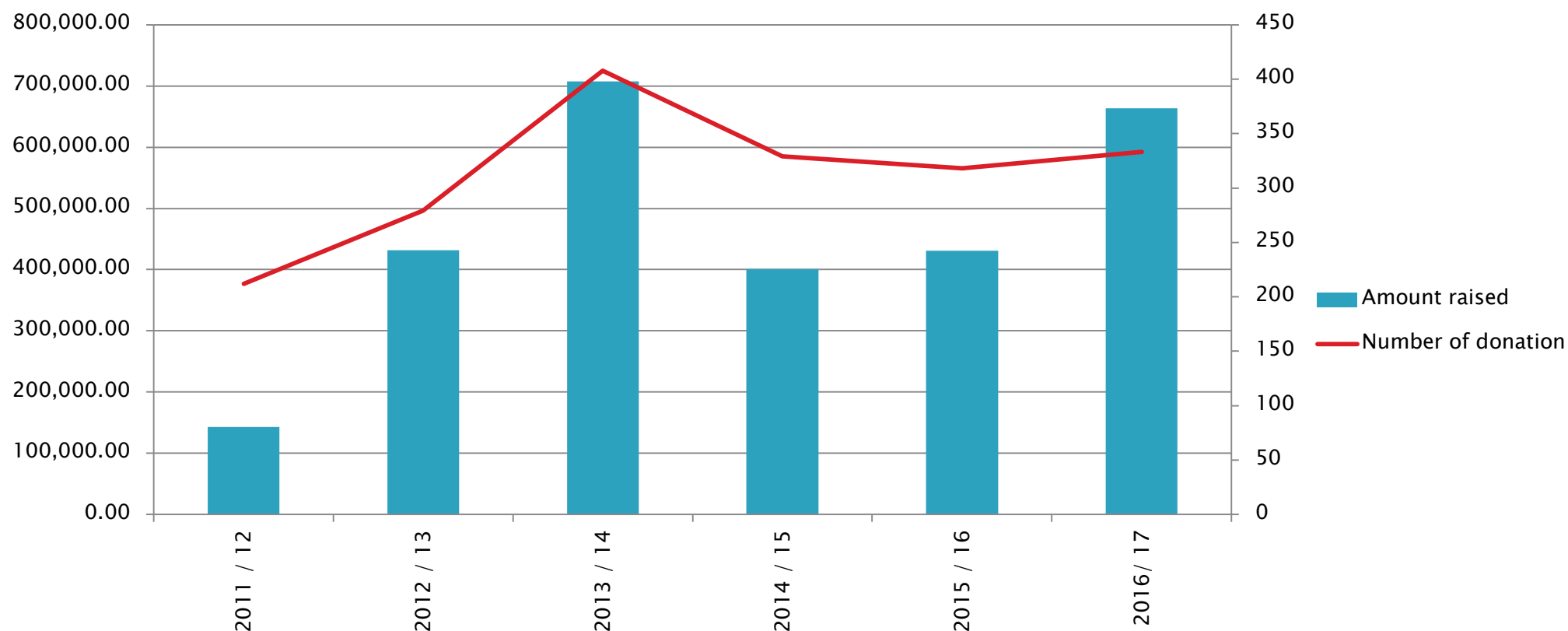
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- Co-ed day school located in South Manchester. 4 – 18
- Highly competitive market
- £2.5m raised in past five years
- ROI of 3.6:1
- Good participation at £10k+ level, over 400 donors for last capital appeal
- 3+ gifts of £100k +, max of £250k – no seven figure gifts yet
- Raise funds for bursaries and ad hoc capital projects
- Development merged with marketing to form External Relations in 2015



Cheadle Hulme School

Fundraising performance since 2012

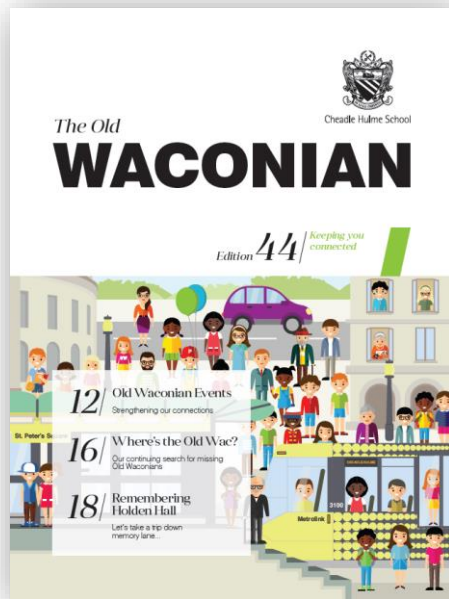




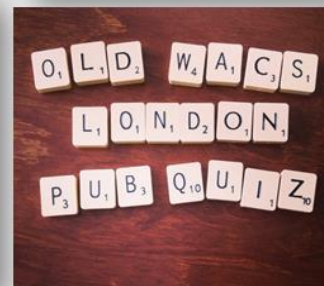
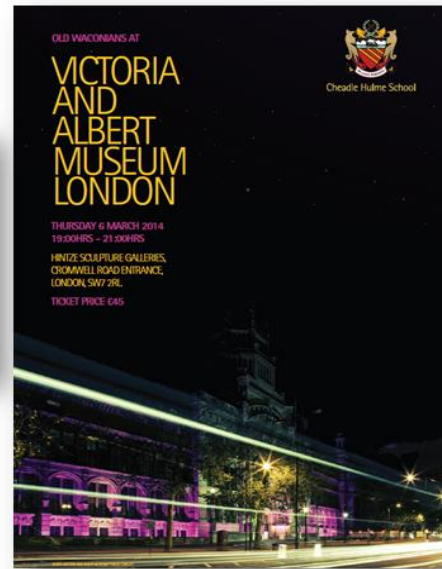
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Top Takeaways for CHS

1. Sharpen focus on major gift fundraising
2. Data is a never-ending story
3. The future lies in segments
4. A smooth transition at the top
5. Don't let External Relations take over!
6. Create the internal 'Light Bulb' moment



Events



Old Waconian News January 2017

Dear Katie

It has been wonderful to hear from so many of you since the latest edition of *The Old Waconian* was published. The response to 'Where's the Old Wac?' has already helped us to reconnect with over 100 OWs around the world. Thanks to you our network is getting stronger by the day.

The Old Waconian



As always, the latest edition of your alumni magazine, *The Old Waconian*, is full to the brim with news, views, events and feature articles which we hope that you have enjoyed reading.

Many of you particularly enjoyed the articles on retiring staff, a sneak peek of the new Pavilion and a trip down memory lane with your Holden Hall memories.

The [online version](#) is fully interactive with videos which we hope you'll enjoy.

A Fond Farewell...

At the end of this academic year, we'll be saying a fond farewell to two Old Waconian favourites, Mrs Sally Petrie and Mr Nigel Westbrook.



If you have fond memories of teaching alongside Nigel or Sally, we'd love to hear from you. We will be collating messages from former students and staff which we will present to them when they leave. Please email er@chschool.co.uk with your messages.

OW News

[Lord Dubbs speaks to CHS students about child refugees](#)

[Meet the new President of the OWA, Karim Khalil QC Class of 1980](#)

Old Wac Events

Old Waconians at Lincoln's Inn
Thursday 27 April 2017
London
More details to follow shortly...

OWA Annual Dinner & AGM
Saturday 10th June 2017
[Tickets available now online](#)
or by phone: 0161 488 3341

OWs Online

There are plenty of online platforms that allow you to stay connected to the School and fellow OWs...

[Facebook](#)

[Twitter](#)

[LinkedIn](#)

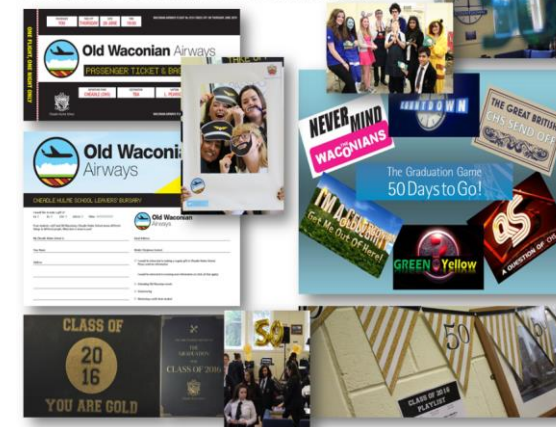
[Old Wac Website](#)

Where's the Old Wac?

Please check our class lists online to see whether we've lost touch with friends.



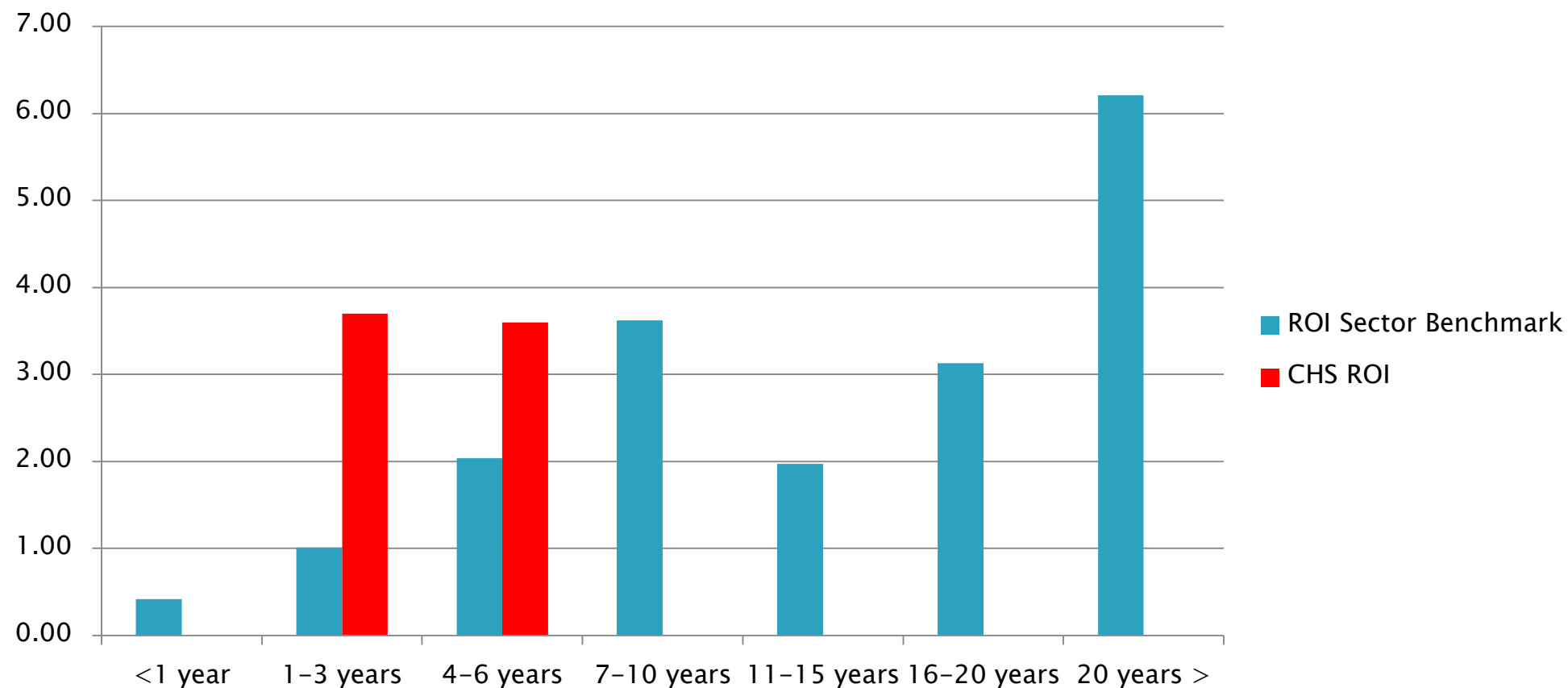
Student to Alumni Transition





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Return on Investment



3 Steps for Success

#1: Measure impact

▶ Major gifts metrics

- Number of Identified prospects
- Number of qualified prospects
- Number of cultivation meetings and activity
- Number of asks/proposals
- £ pledged, £ raised

▶ Engagement

- Number of cultivation events
- Number of tailored communications
- Number of stewardship activities

▶ Regular giving and legacy metrics

- Number of donors (ever)
- Number of donors (current financial year)
- Number of donors retained (%)
- £ pledged, £ raised
- Number of legacy pledges (and value if known)

▶ Volunteering

- Volunteering hours
- Volunteer pledges

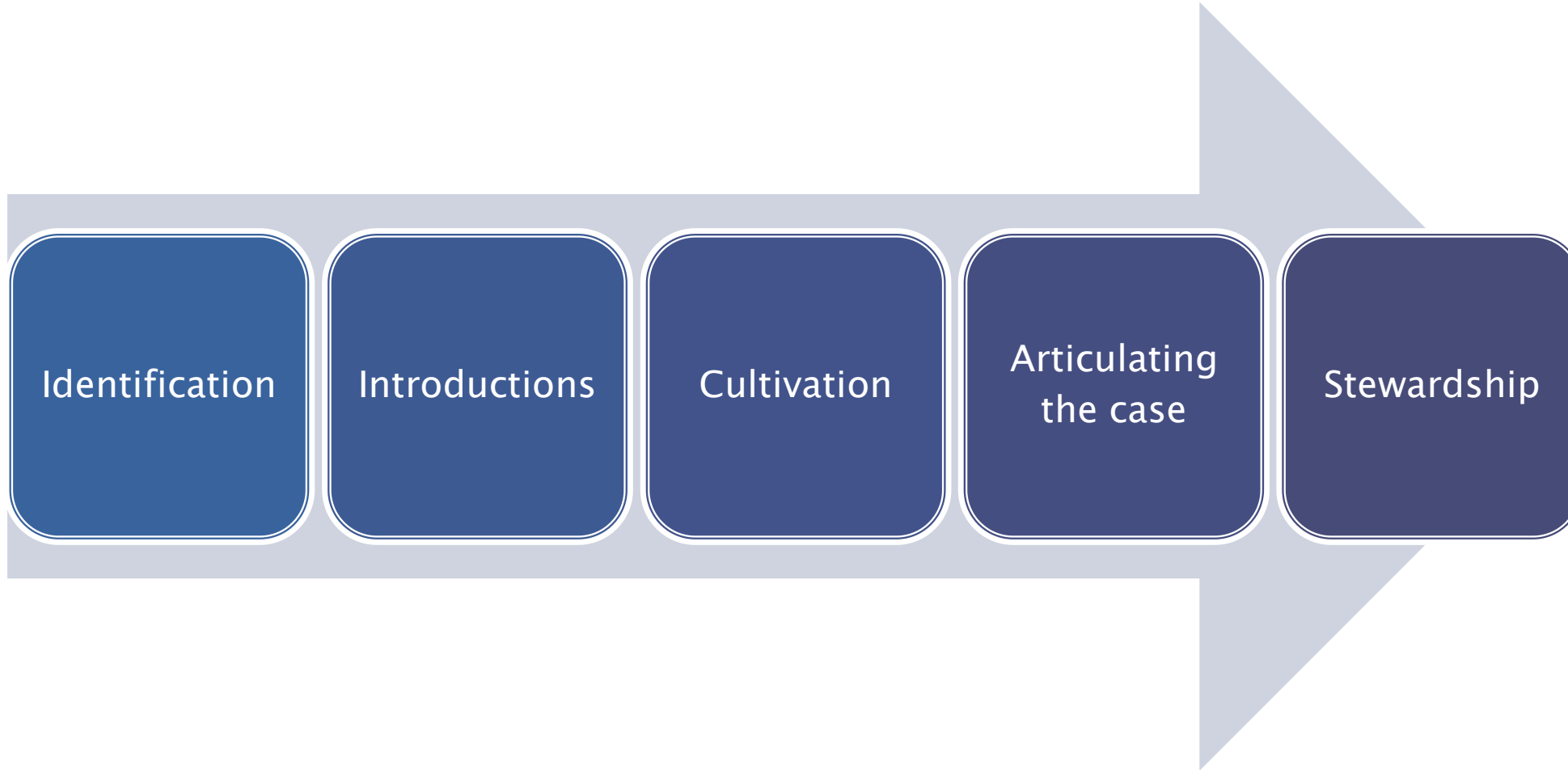
▶ Events

- Number of attendees
- Number of first time event attendees
- Number of events for cultivation purposes

▶ Communications

- Number of click-throughs from e-news
- Number of visits to webpages
- Open rates of email newsletters and invitations
- Social media follows/likes

#2: Involve Senior Staff



#3: Use the data to raise aspirations

- Every school is different
- Use it to motivate your team
- Understand your own strengths and challenges
- Don't try and do it all at once
- Look for the amazing examples and get creative!

Questions?

Frances Kennedy
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