

NAIS and HAIS Present  
*Surviving & Thriving in Challenging Times*  
April 4 ▪ 10:15 – 11:15 am

## Advancement Council Breakout Session Questions

---

1. Assuming that the bad economy is here to stay for awhile, do we change our fundraising goals or do we stay the course with a chance we won't meet them?
  - Stay the course, but goals should be “aspirational”: if you don't reach them, everyone will know and understand why.
  - Re-design scope and timing but don't put capital campaigns on hold, lower size of asks, or delay solicitations: there are always donors for whom this is the right time to make gifts—including planned giving gifts. Do upgrade case for support, solicit in person, accept pledges over time.
  - Giving in recessions: Goals may be a bit too high, or way too high depending on how this plays out: NAIS recession data: 20% drop to no drop or even some gain. Over time, continue upward gain.
  
2. What is the perfect “Business Plan” for today's development office?
  - Development office business plan must be a component of an integrated marketing and advancement initiative.
  - MUST have a planned giving component—recognizing that the dividends will take time to emerge but that they will be substantial.
  - Fight to protect staffing and budget: 3-5 times return on investment over time. Rule of Thumb: 3-5 or more years of cultivation required before major gifts materialize from individual donors. Part of a larger discussion on generating more revenue overall: growing the school; new sources of non-tuition/non-giving/non-endowment income: exploiting the school's physical and intellectual capital.
  
3. How can we view the situation as an opportunity and not an obstacle?
  - This is a time for advancement officers to spend time with teachers and kids—to renew the story bank.
  - Some schools assigning all staff 5 Lybunt calls a day—and getting amazing results. Major donor solicitations: If current gift can't be large, opportunity to nail down a deferred gift.
  - “Too big a crisis to waste.” Opportunity to recast messaging regarding advancement. Admissions: lead with benefits not features. Advancement, lead with donors' needs, not schools needs. Sail into the storm. Don't Give & I Believe videos.
  
4. Is there a way to get the “board on board” and help is a more significant way during the down economy? How does NAIS get its “board on board”?
  - Board chair needs to take the lead and assert the leadership here. Some coaching with the message and means may be in order, even scripting: “I'm calling each board member individually to get everyone's input and

help. We know that like all other school's we're facing a potential budgetary crisis and that giving will be key to our ongoing success: How as a board should we proceed?"

- NAIS Board: We stay at the strategic and generative level: Workshops for the board on "core values"; mindsets; courage.

**5. Never pass up a good crisis. What is good about this particular crisis for today's development offices in the independent school sector?**

- Re-examine and re-purpose endowment draw: shouldn't be too operationally dependent on income from endowment.
- Raise the profile of the importance of advancement; upgrading of the staffing and efforts to retain high quality of advancement professionals. Growing recognition that long tenures at one's school are really important for relationship building.
- The crisis will force development officers to work with the rest of the school leadership team to create life-time customers. To begin using Web 2.0 social networking to advantage. To champion parent customer satisfaction surveying (NAIS) and examine the anti-marketing that we are guilty of. To develop "sticky messages" about the school. To examine and document the value-proposition of the school.

**6. Of all donor groups we work with who is the least challenged by this current downturn?**

- Those who sold businesses before the collapse; those whose businesses prosper in a down economy; those who were invested disproportionately in bonds: all these folks can be approached with the tact that they are among the few who can still offer major support and who might appreciate the need to do so now.
- Grandparents. Toynbee: "The reason that grandparents and grandchildren get along so well is that they are united by a common enemy." Where the wealth is in America. Need to go way beyond Grandparents Day.

**7. What are some innovative programs that schools are doing to increase revenue? How do we capitalize upon the social entrepreneurs in our midst?**

- Rainy Day Funds—cash gifts from most loyal donors in addition to annual giving and capital giving, to be expended in the next 2 years for financial aid ("every student stays" campaigns).
- Put Millennials in charge of online campaigns with young alums that have a social justice element of giving for the school.

**8. What's the perfect development office for today and tomorrow?**

- Staffing and programming that balances the three-legged stool of annual giving, capital giving, and planned giving. A written advancement plan approved by the board where the board owns its success and where goals are based on realistic fund-raising potential and not unrealistic budgetary need.

- Staffed by blend of old-school veterans and digital native Millennials.
9. In today's climate, if a development officer were to deliver a different message about his/her school how would that be framed in order to catch the donor's attention.
- Greater danger of lower expectations than lower results.
  - Families and our city need independent schools to be highly functioning during the crisis: the harbor in the storm. People can't fix what needs to be fixed in the economy if they are worried about their kids having to leave schools that work for them.
10. When thinking about the Schools of the 21<sup>st</sup> century...what do you see in the development office, alumni office, marketing department and director's office?
- Larger commitment to professional training as a team.
  - Larger commitment to contemporary marketing principles with coordinated advancement office focus on ***The 5 Marketing Rs Reputation, Recruiting, Retention, Relationships, Revenues***
  - Knowing it is important to: 1) design new approaches to Gen X and Millennial parents and alumni; 2) focus on aging donors, women philanthropists, and parents new to independent schools; 3) understand the critical importance of enlightened trusteeship; and 4) give more attention to major donors and planned gifts. NAIS has a new and updated third edition of *Philanthropy at Independent Schools*, one that covers these topics. (Hope you like it.)
- II. Extreme Engagement: In today's ways of communicating with "the world" what do you feel is here to stay...and what do you see is coming down the "pipeline?"
- Your new context is fragmented audiences: oldest alums still eschewing email; Gen-Xers are LinkedIn; Millennials are Facebooking and Twittering; and kids are IMing (instant messaging). And all these new means will be old hat soon with the next technological innovation for communicating. What's here to stay for longer than you may think: handshakes; lunch out; printed tangibles that have the unique ability to arrive through a single, universal channel called a mailbox (like birthday cards and thank you notes).