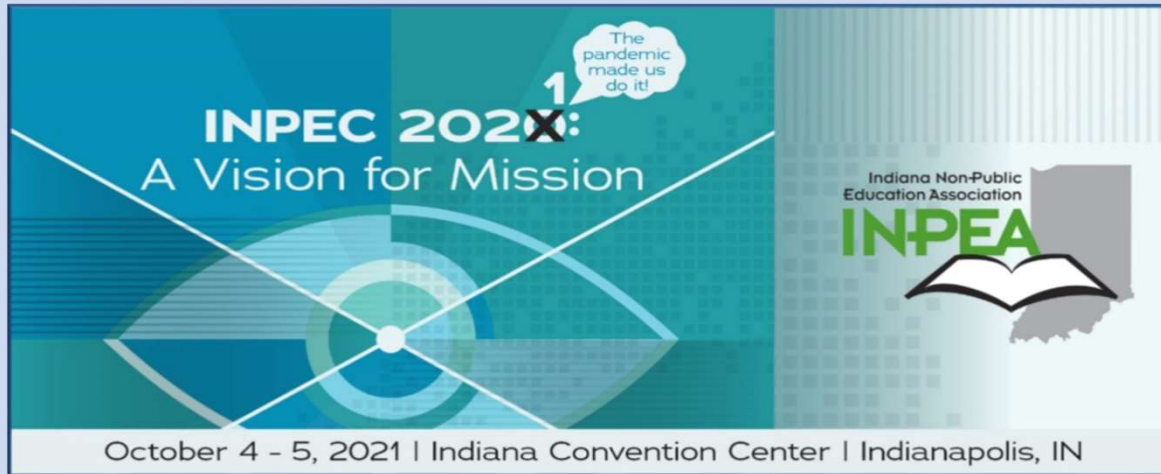


Annual Fund

Moving It to the Next Level



OCTOBER 4, 2021

CATHOLIC
SCHOOL
MANAGEMENT

Strategy



Planning



Leadership

Mary J. Foley
Catholic School Management
a division of Christian Brothers Services



**THANK
YOU!**

Christian Brothers Services

- ◆ Employee/Religious Health Plans
- ◆ Employee Retirement Plans
- ◆ Property/Liability/Student Accident

- ◆ IT Consulting/Website
- ◆ Catholic School Management
- ◆ BMT Financial Services
- ◆ Mission Advancement

“Never say no...”

MISSION

Christian Brothers Services exemplifies the Lasallian tradition by understanding the needs of our members, protecting the human and financial resources of institutions, and guiding member organizations in finding practical solutions to business needs.

Catholic School Management

◆ Strategy

- ◆ School and Program Assessments, Enrollment Management, Marketing, Advancement, Alumni, Mission Clarification, Visioning, Feasibility Studies, Capital Campaigns

◆ Planning

- ◆ Strategic Plans, Plans for Technology, Annual Fund, Development, Marketing, Communication, Social Media, Recruitment/Admissions/Retention

◆ Leadership

- ◆ Workshops, Seminars, Webinars, Board Training, Mentoring, Publications, Retreat Facilitation, Keynote Presentations, Governance, Administrative Structure, Search

If It's Free, It's For Me!

Resources

- ◆ *Catholic School Management Letter*
- ◆ Scholarships
- ◆ Webinars
- ◆ Articles
- ◆ Positions
- ◆ www.cbsservice.org/csm
- ◆ [CSML Sign Up](#)
- ◆ [CSML Details](#)

Recent Topics

- ◆ *Teacher Recruitment*
- ◆ *Please Don't Break the Kids!*





Portsmouth Abbey School

Portsmouth, Rhode Island



Head of School Search

Portsmouth Abbey School, located on the beautiful shore of Narragansett Bay in Rhode Island, is seeking its next Head of School to carry forth its Benedictine heritage and commitment to academic excellence in the Catholic tradition.

Excellence in Faith, Education and Community Since 1926



St. Anastasia Catholic School

Pre-K through 8th Grade / Waukegan, Illinois

Principal Search

St. Anastasia School is seeking a passionate education and faith leader to continue its journey of excellence as it prepares to celebrate its centennial and the next 100 years. St. Anastasia is a beloved school populated with dedicated and caring faculty, staff, students, parents and benefactors eager to support a visionary and committed principal.

The school anticipates launching a strategic planning process in 2022/23 in order to incorporate the next principal's expertise, insight and wisdom.

Always Advancing the Annual Fund

◆ More

- ◆ Prospects
 - ◆ Alumni
 - ◆ Alumni Parents
 - ◆ Friends
 - ◆ Faculty/Staff/Board
- ◆ Solicitations
- ◆ Solicitors
- ◆ Data Driven Planning
- ◆ Best Practices

◆ Better

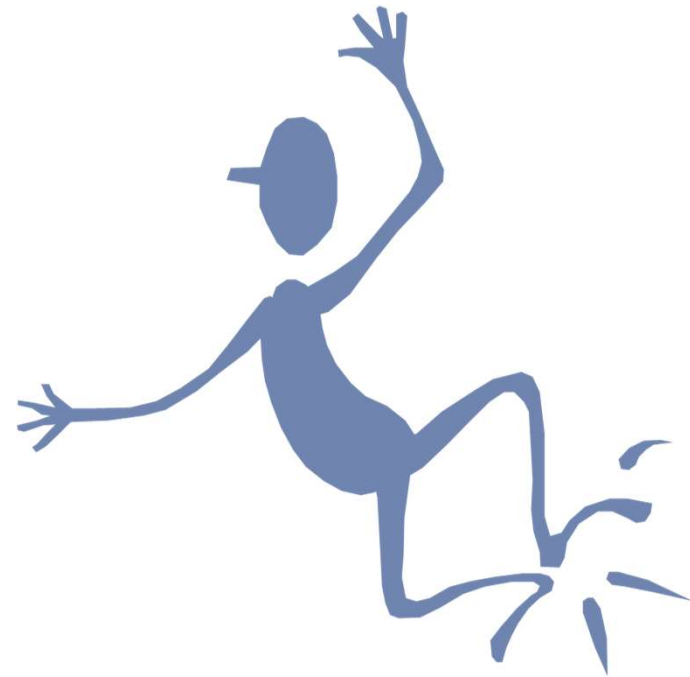
- ◆ Analysis
- ◆ Segmentation, Personalization
- ◆ Major Gift Culture
- ◆ Campaign Model
- ◆ New Initiatives
- ◆ Trends
- ◆ Relationship Building

Reasons For Giving

People give because. . .

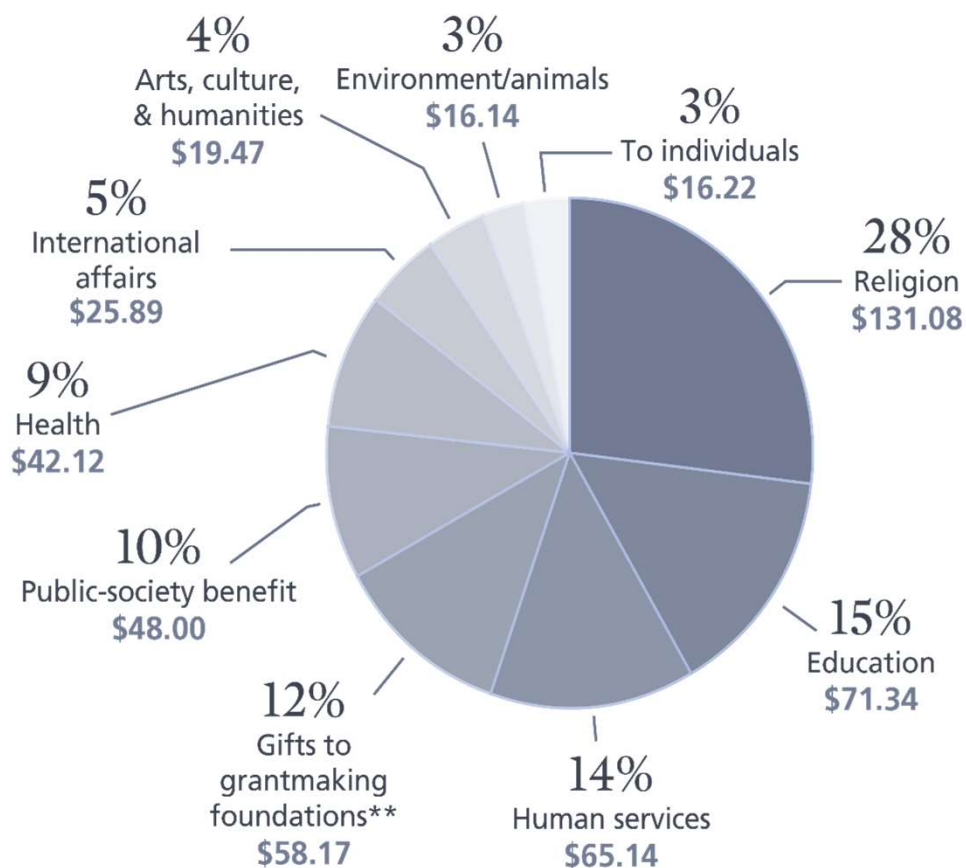
#1... it makes them feel good
about themselves

#2... they are asked



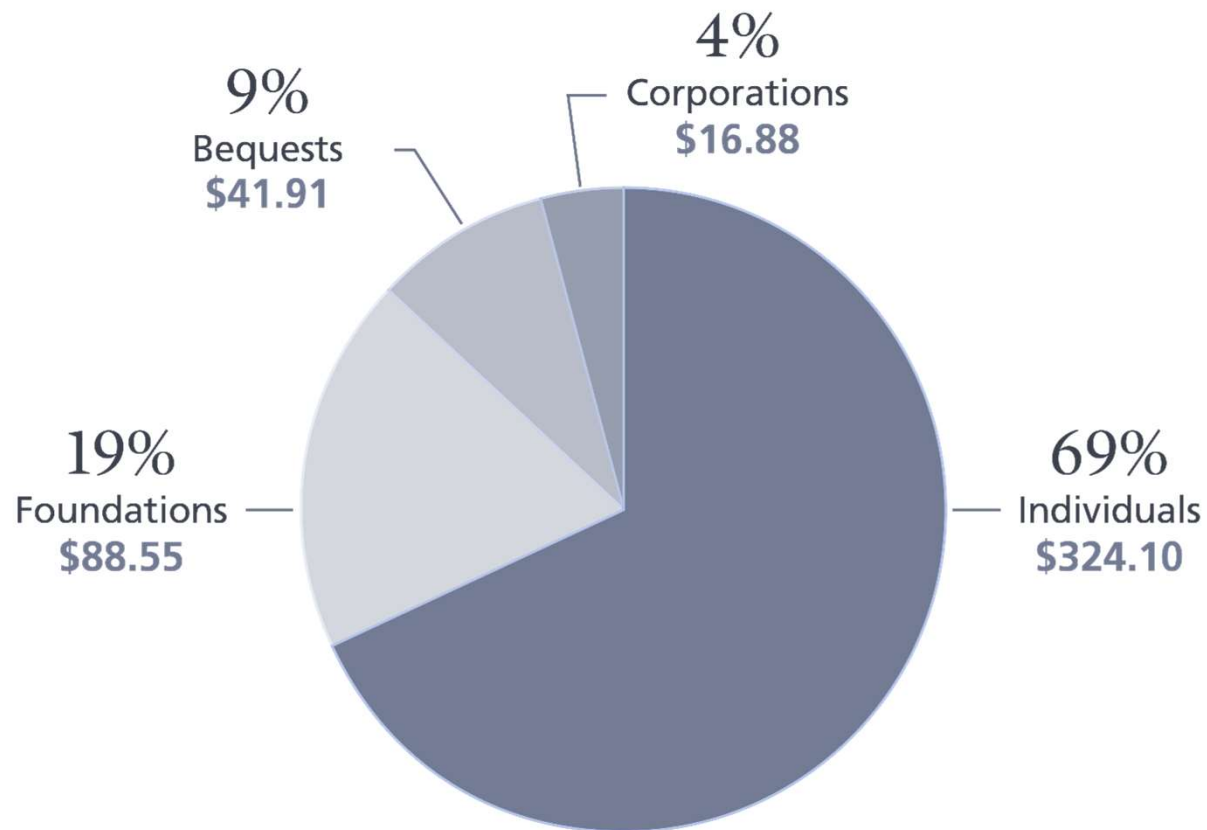
2020 Total Giving = \$471.44 billion

Where does the money go?



2020 Total Giving = \$471.44 billion

From whom does it come?



“From the perspective of the Gospel, fundraising is not a response to a crisis. Fundraising is, first and foremost, a form of ministry. It is a way of announcing our vision and inviting other people into our mission.”

Henri J. M. Nouwen

Annual Fund

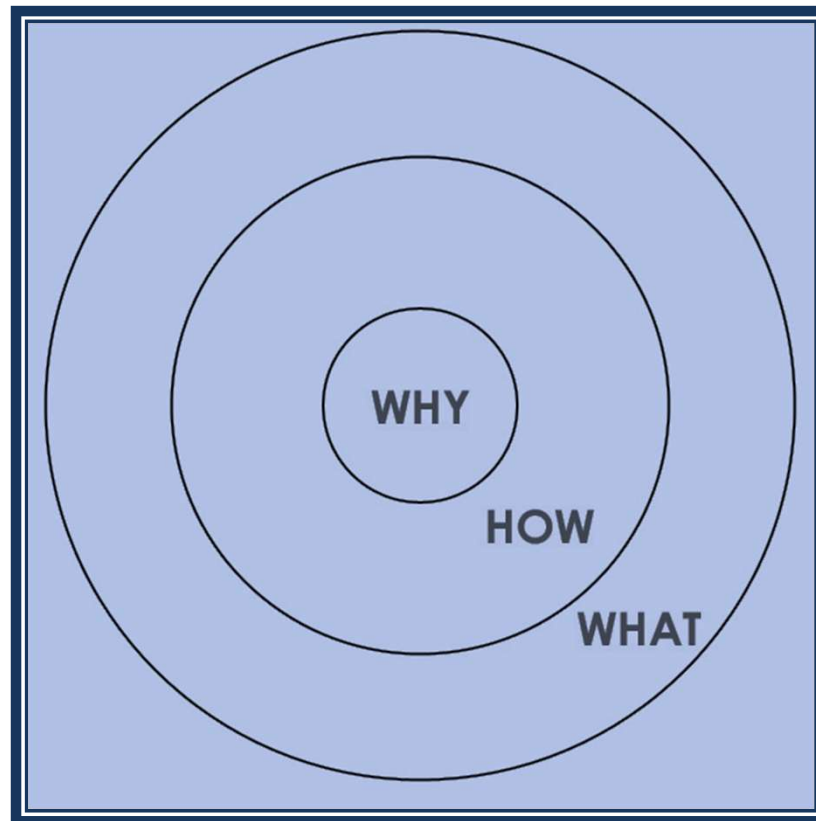
- ◆ Yearly
- ◆ Key Individual Constituents
- ◆ Top Funding Priorities
- ◆ Benefit
- ◆ Students
- ◆ Centerpiece
- ◆ Acquisition
- ◆ Upgrading
- ◆ Potential
- ◆ Major Gifts
- ◆ Bequest Gifts
- ◆ Data Pool

Annual Fund Elements

- ◆ Case for Support: Funding Priorities + WHY
- ◆ Prospects
- ◆ Solicitation
 - ◆ Techniques
 - ◆ Approaches
- ◆ Leadership and Vols
- ◆ Donor Management



Start With Why



Funding Priorities

- ◆ Specifics: Numbers, Cost, **Features**, **Benefits**, Rationale
 - ◆ 3 to 5
 - ◆ Variety/Range
 - ◆ Articulation
- ◆ Budget Shortfall
- ◆ Budgeted Items
- ◆ Above and Beyond
- ◆ How will this year's funds be used?
- ◆ Questions
- ◆ Specificity
- ◆ Unknowns
- ◆ Questions?
- ◆ Then...

12 Annual Fund Advantages

1. **Provides growing and reliable income**
2. Addresses priority needs
3. Builds relationships with all constituencies
4. **Continually expands base of support/develops new audiences**
5. **Upgrades donors to higher levels of commitment and investment**
6. Showcases your school's strengths
7. Increases the volunteer pool
8. Not subject to popularity or seasonality
9. Demonstrates sound and strong financial and future planning
10. Reinforces the value of your organization
11. **Over time is less work and more money**
12. Creates an opportunity for people to feel good about themselves

Annual Fund *Annual* Goals

- ◆ More Money
- ◆ Average Gift Size Increasing
- ◆ Retention Rate Improving
- ◆ New Donor Acquisition Levels Rising
- ◆ New Volunteers/Leadership Emerging



Effective Goal Setting

- ◆ Previous Results
- ◆ Current Status
 - ◆ Audiences
 - ◆ Techniques
 - ◆ Timing
 - ◆ Funding Priorities
 - ◆ Participants
 - ◆ Personalization
- ◆ Goals
 - ◆ \$: total, average gift size
 - ◆ #: donors, within constituency
 - ◆ %: acquisition, retention, percent of ask
 - ◆ Gift Tables
 - ◆ By Segment
- ◆ Data Driven Goals
- ◆ EOY Goals



Reports Plus...

- ◆ Descending Order
- ◆ LYBUNTS, SYBUNTS
- ◆ New Donors
- ◆ COVID Donors
- ◆ DAF Donors
- ◆ Lifetime Giving
- ◆ Intermittent Large Gifts
- ◆ Recency, Frequency
- ◆ Affiliation
- ◆ Timing
- ◆ Patterns
- ◆ Methods
- ◆ Amounts
- ◆ Contact
- ◆ Relationships
- ◆ Easy Wins



LYBUNT, SYBUNT Analysis

- ◆ Last Year, But...
- ◆ Some Years, But...
- ◆ What do you know?
- ◆ What do you do?
- ◆ When?
- ◆ How Often?
- ◆ Key Segments



Case Study: LYBUNTS

- ◆ 400 Donors
- ◆ \$300,000
- ◆ Recapture Likelihood
- ◆ Gift Range
 - ◆ 6 at \$10,000+
 - ◆ 7 at \$5,000 – \$9,999
 - ◆ 55 at \$1,000 – \$4,999

- ◆ Why?

*“Do we know
who these
people are?”*

Case Study: SYBUNTS

- ◆ First Gift, Last Gift
- ◆ Largest Gift
- ◆ Lifetime Giving

- ◆ 70 with Last Gift of \$5,000+
 - ◆ Total Giving
 - ◆ Number of Gifts
 - ◆ Recency

- ◆ If Time Permits...



Case Study: NEW DONORS

◆ Year 1

- ◆ 180 Donors
- ◆ \$150,000
- ◆ \$833 Average
- ◆ 40 at \$1,000+

◆ Year 2

- ◆ 260 Donors
- ◆ \$100,000
- ◆ \$385 Average
- ◆ 20 at \$1,000+

◆ New Donor Protocols

- ◆ New Major Donor Protocols

◆ Why? Stimulus

- ◆ Implications

Major Gifts – Moving Up the Pyramid

- ◆ Simple Math
- ◆ Annual Fund Prelude
- ◆ Data Analysis
- ◆ Volunteer Involvement
- ◆ Remember...
- ◆ Beneficent Cycle
- ◆ ID/Qualification
- ◆ Education
- ◆ Cultivation
- ◆ Solicitation
 - ◆ Ask, Solicitor
 - ◆ Timing
 - ◆ Upgrading
- ◆ Repetition
- ◆ Expansion

Process

- ◆ Prospect Identification
- ◆ Solicitation Strategy
- ◆ Cultivation,
Appreciation
- ◆ Cycle
- ◆ Personal Solicitation
- ◆ Small Group
Solicitation
- ◆ This Calendar Year
- ◆ Each Year

Prospect Identification

- ◆ Constituencies
- ◆ Descending Order Report
- ◆ LYBUNTS
- ◆ SYBUNTS
- ◆ Frequency
- ◆ External Rating Services
- ◆ Capacity/Affinity
- ◆ Internal Insight
- ◆ School Capacity



Solicitation Strategy

- ◆ Ask Amount
- ◆ Most Effective Approach
- ◆ Solicitor, Partner
- ◆ Funding Priority Interest Area
- ◆ Issues, Concerns
- ◆ Questions
- ◆ Other Info Providers
- ◆ Anticipated Questions, Issues, Objections

Moves Management

- ◆ AKA
- ◆ Prospect Manager, Portfolio
- ◆ Moves – Frequency, Dates, Power of Three
- ◆ Waltz, Fox Trot, Tango
- ◆ Prospect Interest + School Activity + Funding Priorities
- ◆ Moves, Deadlines, IMPLEMENTATION, Recording
- ◆ Strategy Development, Portfolio Goals
- ◆ Agenda Item, Group Dynamics, Adjustments

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 - ◆ Friends
 - ◆ Faculty/Staff
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Annual Fund Direct Mail

- ◆ **Outside Envelope**
- ◆ Appeal Letter
- ◆ Enclosures
- ◆ Reply Device
- ◆ Rule of Three
- ◆ Effective Opening
- ◆ Emotion, Rationale
- ◆ **P.S.**
- ◆ Ask
- ◆ Design
- ◆ **Segmentation, Personalization**

New Initiatives

- ◆ Segmentation, Personalization
 - ◆ Usual, Anniversary
 - ◆ Funding Priority
 - ◆ Funded Student
 - ◆ Alumni Interest Areas, Gatherings
- ◆ Small Group Solicitation
- ◆ Donor Societies
- ◆ Upgrade Strategy
- ◆ Challenge Gifts
- ◆ Micro/Mini Projects
- ◆ Pre-Event Cultivation
- ◆ Q4 Strategies
- ◆ Webinar



Year 1: \$210,266 total
\$144 average

Year 2: \$329,999 total
\$258 average

Speed Fundraising

- ◆ Small Group Solicitation
- ◆ Rationale
- ◆ Options
 - ◆ Segmented/Joint
 - ◆ Single/Many
- ◆ Grouping
 - ◆ By Ask
 - ◆ By Affiliation
 - ◆ By Host Decree
 - ◆ By Guest Preference

- ◆ Success Rate, Impact, Cost/\$, Time, Renewal



*“So you just,
out of the blue,
invite people over
to give money?”*

“And they come?”

Event Specifics

- ◆ Number, Locale, Type, Other Attendees, Invitation
- ◆ Presentation
 - ◆ Hosts – *Welcome, Thank You, Connection, Experience, Rationale*
 - ◆ President/Principal – *Thank You, Importance, Personal Gift, Confidence*
 - ◆ Speaker – *Connection, Experience, Hope*
 - ◆ Leader – *Details, Benefits, Ask, Directions*
- ◆ Ask Packet: Letter, Brochure, Reply Device, Return Envelope, Premiums

Event Follow-Up

- ◆ Thank You: Attendees
- ◆ Missed You: Non-Attendees, Packet
- ◆ Return Time
- ◆ Gift Pursuit: Calls, Visits, Letters
- ◆ Role Playing
- ◆ Persistence!
- ◆ Non-Attendee Solicitation
- ◆ Donor Acknowledgement

Donor Society

- ◆ Invented to...
- ◆ Objective
 - ◆ Initiate
 - ◆ Renew
 - ◆ Expand
- ◆ If Current
 - ◆ Efficacy
 - ◆ Awareness
- ◆ If New
 - ◆ Prospect Identification
 - ◆ Preliminary Outreach/Feedback
 - ◆ Inaugural Members
- ◆ Name/Rationale
- ◆ Gift Levels
 - ◆ Amounts
 - ◆ Names
 - ◆ Benefits

*“Whenever two or three
are gathered in a gift club...
it’s time to start a new one!”*

Sr. Mary Tracy, NCEA

Upgrading Existing Donors

- ◆ Rationale
- ◆ Christian Kindness
- ◆ Implications
- ◆ In the theatre...
- ◆ In fundraising...
- ◆ Frequency
- ◆ Options
 - ◆ Challenge: Additional Amount, Total from Group, etc.
 - ◆ Donor Society/Benefits
 - ◆ X# from Class of 1975
 - ◆ Signator's Pledge
 - ◆ Other

*We have high expectations
of our students,
why not our donors?*

Challenge Gifts

- ◆ Never Fail
- ◆ Audience
- ◆ Timed
- ◆ Amount
- ◆ Increase
- ◆ Ratio
- ◆ Locale
- ◆ Understanding
- ◆ *a call or summons to engage in any contest*
- ◆ *something that by its nature or character serves as a call to a special effort*
- ◆ *donated or given on condition that the recipient raise an additional specified amount*

New Initiatives

- ◆ Segmentation, Personalization
 - ◆ Usual, Anniversary
 - ◆ Funding Priority
 - ◆ Funded Student
 - ◆ Alumni Interest Areas, Gatherings
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- ◆ Challenge Gifts
- ◆ Micro/Mini Projects
- ◆ Pre-Event Cultivation
- ◆ Q4 Strategies

Q4 – The Most Generous Quarter



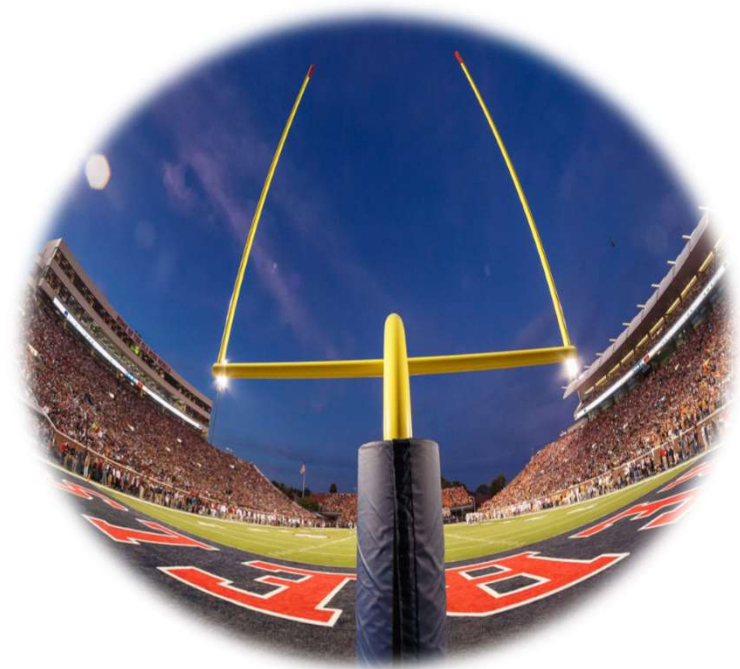
Options, Considerations

- ◆ Giving Tuesday
- ◆ **Trained Vol Sols**
- ◆ Peer Solicitation
- ◆ Matching Gifts
- ◆ **Giving Page**
- ◆ Generations
- ◆ **Faculty Engagement**
- ◆ DIY
- ◆ Testing, Samples
- ◆ Donor Research
- ◆ Integrated Comm and Solicitation
- ◆ Social Media
- ◆ **Test Marketing**
- ◆ Donor Appreciation
- ◆ Best Practices
- ◆ **Your Next Moves**

Q & A

Touchdown + Extra Point 7 Ways to Score

1. Start with Crunches
2. Playbook
3. Call Your Play
4. Kicking, Running, Passing
5. Trick Plays
6. Time for an Audible
7. Two Minute Warning



Wrap Up

- ◆ 88 Days
- ◆ Webinars
https://www.cbsservices.org/webinars_upcoming.php
- ◆ *Catholic School Management Letter*
- ◆ Archives
- ◆ Each Other!





**THANK
YOU!**

For More Information

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