How Three Schools Moved the Needle on Annual Fund Participation

Presenters:

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Marie Capasso, Annual Giving Manager, Riverdale Country School
Julie Wityk, Director of Development and Alumni Relations, The Churchill School & Center
Moving the Needle on Parent Participation at Brooklyn Friends

Two simple steps:
- Tripled size of Annual Fund Committee over two years
- Instituted a challenge that
  1. conveyed a sense of urgency
  2. encouraged Friendly competition
Recruiting Volunteers

• Referrals from current volunteers and parents’ association leadership
• Recommendations from faculty and staff
• Parents’ association event volunteers
• Presence at school community events
• New parent outreach
• Leadership donors
• Consistent donors
Recruiting Volunteers

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- Consistent donors
- FLATTERY WILL GET YOU EVERYWHERE
Training Volunteers

- Volunteer kick-off training meeting at the home of AF chair
- Finance 101 presentation by HOS and CFO
- Review of committee handbook
- Q & A
- Targeted divisional group mini-trainings
Motivating Volunteers
Autonomy with Accountability

- Committee reporting structure
- Classroom/grade level volunteers work as a team—engenders camaraderie
- Friendly competition
- New messages for volunteers to focus on throughout the year
- Guest speakers at committee meetings
- Blind copied on thank you emails from office immediately upon receipt of gift
- Monthly progress reports
How We Keep Them Coming Back for More

- An entry point to further leadership roles
- Access
- Camaraderie
- Flexibility
- Variety of tasks
- Recognition
- Social Events
A Bit About
Brooklyn Friends Volunteers

• 50% of our parents volunteer for the school
• 250% increase in Brooklyn Friends Fund volunteers over the past 5 years
• Volunteers have the highest average Brooklyn Friends Fund gift amount
• 40% are men, 65% are leadership donors, 9% receive tuition assistance
The Little Challenge That Could

...or how BFS turned $13K into 18 participation percentage points
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PHASE 1: PS AND LS
• The first 5 classrooms to reach 100% each earn an extra $1,000 for the AF
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• The first 5 classrooms to reach 100% each earn an extra $1,000 for the AF
• Six-week deadline (but it only took 3-1/2)
The Little Challenge That Could

...or how BFS turned $13K into 18 participation percentage points

**PHASE 1: PS AND LS**
- The first 5 classrooms to reach 100% each earn an extra $1,000 for the AF
- Six-week deadline (but it only took 3-1/2)
- Recognition in printer’s proof an added incentive
The Little Challenge That Could

PHASE 2: PS AND LS
• Additional $500 to the Fund for each additional classroom to reach 100% participation
The Little Challenge That Could

PHASE 2: PS AND LS

• Additional $500 to the Fund for each additional classroom to reach 100% participation

• Additional $1,000 to the Fund for every grade that achieves 95% participation
The Little Challenge That Could

PHASE 2: PS AND LS

• Additional $500 to the Fund for each additional classroom to reach 100% participation
• Additional $1,000 to the Fund for every grade that achieves 95% participation
• Four-week deadline
The Little Challenge That Could

**PHASE 2.1: MS AND US**
...doing more with less

- Additional $1,000 to the Fund for each grade that gets to 90% participation
- Funded by the Brooklyn Friends Fund Committee
- Four-week deadline
Results!

• 15 classrooms and advisories hit 100% participation
• 5 PS and LS grades hit at least 95% participation (100%, 99%, 98%, 97% and 96%)
• 2 MS grades hit at least 90% participation (98% and 96%)
• Overall parent participation: 82% up from 64% in 2012-13
• New parent participation: 92% up from 57%
The Churchill School and Center

2016-2017 Faculty and Staff Campaign for The Churchill Fund
2015-2016 Faculty and Staff Participation

8 %
#OneChurchill

Integrity-Kindness-Responsibility-Respect-Perseverance
16-17 CF Campaign

• During October and November - Achieve 100% from 3 Constituent Groups:
  
  – Board of Trustees
  – Senior Class Parents
  – Faculty and Staff
Faculty and Staff Campaign Strategies

• Regular Communication
• Cheerleading and Celebrating Small as well as Large Successes
• Friendly Competition
• Fun
Faculty and Staff Campaign

• Leadership Team reach 100% first
• End of September – All Staff Meeting – Faculty and Staff Campaign introduced by the HOS
• Incentive – if 100% participation is achieved by December 1, everyone will be entered into a drawing for One Free Day
• A Basket, Sign with terms, Faulty/Staff forms and envelopes behind Reception
Dear Faculty and Staff,

Happy Friday!

You might have noticed the Participation Chart in the lobby with Faculty and Staff participation by division. A Big THANK YOU! to everyone who has made a gift to The Churchill Fund so far!

**We are at 21% overall participation after one week! You Rock!!**

As of yesterday afternoon, The Administration and Building Staff group was leading the pack with 45% participation.

Followed by: HS (15%), MS (13%) and ES (11%). The Participation Chart appears below.

Today, we have a special incentive: **A Bottle of Red, A Bottle of White and 2 Movie Passes for the winner!**

Here is the challenge:

1. The Deadline is 2:00 pm this afternoon.

2. Only the names of those in the Division that is leading in percentage participation at 2:00 pm today will be entered in the drawing. Everyone in the Leading Division who has given or pledged to The Churchill Fund from the start of the drive through 2:00 pm today will be included.

3. Due to a smaller pool, your chance of winning will be much higher – *if you have given and your division is the leader.*

**Our Goals are:**

Overall 50% participation from Faculty and Staff by Monday, October 17

Overall 100% participation by Thursday, December 1

Gifts of any size are welcome and appreciated!

If 100% participation is achieved, everyone’s name will be entered for a chance to win One Free Day!

If you are not in today, email me with your pledge or make a gift online through the link - you will be entered in the drawing if your Division is ahead.
Participation Chart 1
Hi, Everyone -

There is a little less than 2 hours to go before our cut-off for the drawing.

Thanks to all who have inundated our office with gifts today! Total participation of Faculty and Staff is up to 31% as of Noon today!! WOW! to all of you!

Here are updated participation standings:

Administrative and Building Staff 47%
High School 30%
Middle School 28%
Elementary School 22%

Thanks again - and you still have time to get your division into the lead - This morning’s email is below. The online link again is www.churchillschool.com/donate.

The Development Team
Faculty Participation Ahead of the Board!

Tim and Cynthia,

You can do with this what you like:

As of this afternoon, here is the percentage participation for these two groups:

Trustees 34%
Faculty and Staff 40%

Pretty Great!!

Julie
Happy Friday!
Thanks to everyone who has made a gift to The Churchill Fund so far! We greatly appreciate your support!

**We are at 44% overall participation after two weeks!**

**Standings are as follows:**
Administration and Building Staff: 63%
Middle School: 53%
High School: 36%
Elementary School: 33%

We are trying to reach 50% by Monday, October 17. This would achieve the first of our goals. If we achieve it, everyone who has participated by making a gift to The Churchill Fund will be entered into a special drawing.

We need gifts from 12 faculty and staff members to reach 50%.

The Deadline is 11:59 pm Monday, October 17.

And if 100% is achieved by December 1, everyone's name will be entered for a chance to win One Free Day!

You can make a gift or pledge using the envelopes and form behind the reception desk and leaving it in the basket, or go online and make a gift by credit card at [www.churchillschool.com/donate](http://www.churchillschool.com/donate).

Thanks,

Tim
Hello High School Faculty and Staff –

As you may know, the high school is currently in last place in Churchill Fund participation. Our current participation is 42%. (Overall: 54%; Admin/Bldg: 71%; MS: 63%; ES: 53%)

Thank you to everyone who has made a gift or pledge so far! Your support is greatly appreciated.

We are looking for an overall 75% participation from all Faculty and Staff by Thursday, November 10. Let’s do our part by reaching 75% in the HS division by next Friday, October 28!

I would like to offer an incentive of two Fairway Gift Cards valued at $20 each to see if we can reach 75% participation by next Friday. It will work like this:

The Deadline is 2:00 pm, Friday, October 28.

The names of those in the High School division who have made a Churchill Fund gift from the start of this drive through 2:00 pm Friday, October 28 will be entered into the drawing and two winners will be selected. I will even let those two winners leave 30 minutes early on the following Friday to use their cards at the local Fairway.

We have 53 people counted in our division. Each participant increases our overall participation by nearly 2%. In order to reach 75%, we need gifts or pledges from 18 people who have not yet participated.

And if 100% is achieved by December 1, everyone’s name will be entered for a chance to win One Free Day!

You can make a gift or pledge using the envelopes and form behind the reception desk and leaving it in the basket, pick one up in my office, or go online and make a gift by credit card at www.churchillschool.com/donate.

Thanks again for your support!
Good Morning, Everyone –

Happy Friday!

**A Big Shout Out and Thanks!!** to everyone who has made a gift to The Churchill Fund so far! To update you on the Overall and Division Standings:

**We are at 62% overall participation after one month!**

Administration and Building Staff: 81%
MS: 63%
HS: 58%
ES: 55%

We have another drawing for wine today - a bottle of red and a bottle of white.

The Deadline is 2:00 pm this afternoon.

Everyone who has given since the start of the Faculty and Staff Campaign through 2:00 pm today will be entered into the drawing.

We are still looking for an overall 75% participation from Faculty and Staff by Thursday, November 10. Stay tuned for a special reward if we reach that goal.

And if 100% participation is achieved by December 1, everyone’s name will be entered for a chance to win One Free Day!
Participation after One Month
Dear #OneChurchill Community,

The Churchill Fund is off to a great start in 2016-2017! Thank you to all of you who have made a gift so far this year! Your generosity is greatly appreciated!

We are pleased to provide a report on the status of The Churchill Fund. As of today, October 26, here are the numbers:

- Total Raised: $385,000 (26% of the goal of $1.5 million)
- Current Parents Participation: 11%
- New Parents Participation: 17%
- Faculty and Staff Participation: 62%
- Board Participation: 88%

Let’s keep the momentum going! To make a gift online now, please click here.

Thanks again for your support!!

The Development Team
$75 for 75%

Good Morning, Everyone -

The response to the Faculty and Staff Campaign is been huge! Thank you so much for your support!

Our next benchmark is to achieve **75% by 2:00 pm this Thursday, November 10!** (This is extremely doable, since we are currently at 73% overall.)

Everyone who has made a gift by that deadline will be entered into a drawing for a **$75 Amazon Gift Card!**

Congratulations to the High School for catching up to Administrative and Building Staff - they are dead even at 81%!

Congratulations also to the Elementary School for the big surge last week - at 65%, you have overtaken the Middle School!

And Middle School, 63% is a very good number - we know your focus last week was on the amazing Spooky Hallway and the Plymouth Trip!

Here are the standings as of this morning -

- ES 65%
- MS 63%
- **TOTAL PARTICIPATION 73%**
- HS 81%
- Administrative & Building Staff 81%
Hi, Everyone -

Faculty and Staff Participation is at 77%! 

From Highest to Lowest, here are the Division Totals:

High School  83%
Admin/Building  81%
Middle School  73%
Elementary School  71%

And -

The winner of today's drawing for a $75 Amazon Gift Card is

XXXX

The next and last deadline: 100% participation by Thursday, December 1. If achieved, there will be a drawing for one free day.

Thank you all for your generosity and support! Have a wonderful long weekend -

Julie
Last Call

- The Deadline to reach 100% is Tomorrow, December 1, at 11:59 pm.
- Gifts needed from 25 people to reach 100%
- HS 87%
- ES 85%
- TOTAL PARTICIPATION 85%
- MS 83%
- Administrative & Building Staff 83%
Final Results

• Faculty and Staff Participation 88%
• High School 91%
• Elementary School 89%
• Middle School 88%
• Admin/Building 83%

• Raised $5,800 from 149 staff members
Final Rewards

• No Drawing for a Free Day
• Calendar year end Staff Meeting
  – Drawing for 3 Prizes
    • $25 Amazon Gift Card
    • 2 Movie Passes
    • 2 Bottles of Wine
• Festive Holiday Staff Party at The Churchill Tavern
• 100% by June 30, 2017?
Alumni Affairs

- Homecoming
- Decade Parties
- Career Networking Events
- Roundtable Discussions
- Community Action Day
- Egg & Cheese Young Alumni Day
- Alumni Newsletter
Alumni Solicitation Schedule

- **Fall appeal**
  - Printed business letter
  - Signed by alumni classmates or head of school
  - Reply card containing past 3 years giving history
- **December appeal**
  - 3-4 emails throughout December advertising end-of-calendar-year tax cutoffs
- **Winter appeal**
  - Email appeal
- **Spring appeal**
  - Brochure-style solicitation
- **June appeal**
  - 3-4 emails throughout June regarding fiscal year-end.
Volunteer Recruitment and Retention

• In 2016 and 2017 mass email volunteer recruitment was used
• Contacted alumni who were members of the consistent donor category
  – Five years of Annual Fund donations at any level, or
  – Yearly donations since your affiliation with Riverdale began
Dear Name,

I hope this email finds you well. My name is Marie Capasso and I am the Annual Giving Manager at Riverdale Country School. I work closely with our Annual Fund volunteers to raise participation numbers in individual alumni classes as well as within our alumni community as a whole. As a past donor, you already know the importance of supporting Riverdale and that a gift of any size makes a difference for our entire community -- I thank you for your past support!

Currently, we do not have an Annual Fund volunteer in your class and I am writing today to see if you would be interested in assisting with fundraising this year. As a volunteer, you would be provided with a short list (around 10) of your classmates to contact by phone and/or email on behalf of Riverdale to encourage them to support the school this year.

If you think you might be interested in volunteering for Riverdale in this way, I would love to discuss the role in more detail. Please let me know the best time to reach you or feel free to reply to this email.

Thank you for considering this request, and I hope to hear from you soon.

Best,

Marie
Volunteer Structure

• Volunteers select their own assignments
  – Each volunteer (or volunteer team) is sent a class list
  – Pick seven names to contact
  – Riverdale chooses an additional five names
Volunteer Structure

• Updates are sent via email when gifts are received
• Volunteer reports are sent periodically
  – Volunteer reports show contact information, donation status, and volunteer’s success rate
• Phone calls
  – Make rounds of phone calls to gain insight into status of outreach
Volunteer Cultivation and Stewardship

• Social Events
  – Invited to leadership donor event
  – Invited to volunteer appreciation event hosted by a volunteer and Riverdale’s Head of School

• Receive special acknowledgment in the Report of Gifts
• Receive personalized notes from the Head of School
Participation Challenges

• Alumni Match Challenge
  – Gift incentive challenge

• Hilltop Challenge
  – Inter-school competition
Alumni Match Challenge

• $50,000 match challenge
• Sponsored by an anonymous alum
• Gifts are matched dollar for dollar, and matched 2:1 for increased gifts over previous fiscal year’s donation
Alumni Match Challenge

Parameters have changed each year:

- FY13: May and June
  - Received approximately $116,000
  - Secured 164 donors

- FY14: two-day challenge
  - Received approximately $113,000
  - Secured 91 donors

- FY15: Mid-May and June
  - Received approximately $116,000
  - Secured 170 donors

- FY16: Leap Day (one day challenge)
  - Received approximately $60,000
  - Secured 50 donors
Leap Day Challenge

Across both campuses, we work hard every day to grow ideas, relationships, and individual development. Sometimes something extraordinary happens in just one day...

At the Lower School Carnival, all grades gather to challenge themselves at the rock wall, try new foods, and even dunk fifth graders in the dunk tank!

Middle School Community Day brings all three grades together to talk about worldwide issues that have a personal impact. This past fall, students shared stories of belonging and identity, learning how they can make connections on a personal and global scale.

Last year’s One World Day in the Upper School explored mental health and wellness, and was devoted to exploring strategies to focus, organize, and develop a deeper understanding of self.

This year, on February 29th, we’ll get an “extra” day to encourage special programs for our students inside and outside the classroom. What can you do to help Riverdale on Leap Day?

You can support the 2015-2016 Annual Fund and make these events -- and all of the unique programming at RCS -- possible. On Leap Day, Riverdale will be working to meet a $50,000 challenge from an anonymous donor, who will match all alumni donations 1:1 and any increase from alumni who gave last year 2:1. So, save the date to make a difference for Riverdale!

(Don’t want to wait to participate in the challenge? Make your Annual Fund gift today by visiting www.riverdale.edu/alumnichallenge or calling the Development Office at 718-519-2745 and mentioning the challenge.)
Leap Day Challenge

Make our Leap Day challenge a success! Please make your gift TODAY to the 2015-2016 Annual Fund and help Riverdale continue the unique programming that inspires our students every day.

Let's show what our alumni community can do!

Help us get one step closer to securing a $50,000 match from our anonymous alumni donor!

To participate, make a donation at www.riverdale.edu/alumncampaign or call the Development Office at 718-619-2746 between 8 a.m. and 4 p.m. EST.

If we miss your call, please leave a message with your name, the amount of your pledge, and a number where we can reach you (any pledge received by 11:59 p.m. EST will count in the challenge).
Hilltop Challenge

- Competition between Horace Mann, Ethical Culture Fieldston School, and Riverdale
- Different parameters and rewards each year
2016

#HilltopChallenge

• Two-week competition in May
• Competition to bring in most donors
• Losing schools’ Athletic Directors wear winner’s swag
2016 #HilltopChallenge
2016 #HilltopChallenge Results

• Riverdale came in 2\textsuperscript{nd} place with 188 donors
• Participation increased 26\% (3.2 percentage points)
We’d like to take time for your questions and comments

Thank you!