Stronger Together:
Anatomy of Brick’s Historic Campaign

NYSAIS Institutional Advancement Conference
March 14, 2017 | New Paltz, NY

Presented by: Lydia Spinelli, Director, The Brick Church School
Charlie Michaud, Principal & Managing Director, CCS
Agenda

1. About Brick Church School
2. Current Trends in Philanthropy
3. The Campaign for Brick
4. Discussion Questions
About The Brick Church School
### About Brick

<table>
<thead>
<tr>
<th>Founded</th>
<th>1767</th>
<th>1940</th>
</tr>
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<tbody>
<tr>
<td>Members</td>
<td>1,735</td>
<td>165</td>
</tr>
<tr>
<td>Leadership</td>
<td>Rev. Michael Lindvall, Senior Minister The Session Deacons Trustees</td>
<td>Lydia Spinelli, Director Day School Committee</td>
</tr>
<tr>
<td>Partners &amp; Programs</td>
<td>Neighborhood shelter Habitat-NYC Inwood House Jan Hus Presbyterian New York Common Pantry Search and Care</td>
<td>Early childhood school (Sept. – June) Summer Steps (July)</td>
</tr>
</tbody>
</table>
About Brick, continued...

<table>
<thead>
<tr>
<th>Amount Raised Annually</th>
<th>$2.7M</th>
<th>$880K</th>
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<tbody>
<tr>
<td># of Donors</td>
<td>580</td>
<td>205</td>
</tr>
<tr>
<td>Budget</td>
<td>$9.7M</td>
<td>$5.2M</td>
</tr>
<tr>
<td>Endowment</td>
<td>$33.2M</td>
<td>$9.6M</td>
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Section 2

Current Trends in Philanthropy
Philanthropy in America

Education received the second highest percentage of charitable funds.

15% WAS RECEIVED BY EDUCATION INSTITUTIONS IN 2015

($ in Billions)

$119.3

Education

Religious

Human Services

Foundations

Health

Public-Society Benefit

Arts/Culture & Humanities

Intl Affairs

Environmental & Animal

$119.3

$57.5

$45.2

$42.3

$29.8

$27.0

$17.1

$15.8

$10.7

Source: Giving USA Foundation (Giving USA 2016)
Historic Support for Education
Giving to education, 1975 – 2015
(in billions of dollars)

Source: Giving USA Foundation (Giving USA 2016)
## Support for Independent Schools

In 2016, independent schools averaged $873K in annual giving and $2M in capital giving.

<table>
<thead>
<tr>
<th></th>
<th>Annual Giving (Average per school)</th>
<th>Capital Giving (Average per school)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Schools</td>
<td>$698K</td>
<td>$873K</td>
</tr>
<tr>
<td>East Region (NAIS)</td>
<td>$866K</td>
<td>$1.5 Million</td>
</tr>
<tr>
<td>NYSAIS Members</td>
<td>$880K</td>
<td>$1.5 Million</td>
</tr>
</tbody>
</table>

- **Parents contribute the largest fraction of annual giving** (37%) and their influence has grown in the last decade.

- **Trustees/board members contributed 25%** of total capital giving.

- **Capital campaigns trigger alumni giving:**
  - 31% contribute to capital campaigns, while 9% support annual appeals.

*Source: National Association of Independent Schools (NAIS)*
The Campaign for Brick
Where we started

Brick and CCS collaborated on a campaign feasibility study over a four month period beginning October 2014.

- Strategic conversations with key stakeholders
- E-survey sent to over 800 individuals
- Close collaboration with leadership, staff, and volunteers
- Regular committee meetings
- Wealth screening analysis

- 250+ e-survey participants
- 70+ strategic conversation participants
- 961 Brick families were analyzed through a wealth screen and verification process
- 90% of those asked in the church and school participated

Membership (approx.)

- Church: 40%
- School: 41%
- Both: 19%
About the campaign

Combined campaign for capital improvements and endowment centered around the 250th Anniversary of the Church and 75th Anniversary of the School:

The Campaign for Brick

- $10M working goal increased to $16M based on success
- 14-month period with 3 phases
  - Phase I – Principal Gifts
  - Phase II – Major Gifts
  - Phase III – Public Phase

90% of school interviewee participants cited they would consider a gift to the campaign.

80% “Now is the right time for a campaign.”

77% of school e-survey participants cited they would consider a gift to the campaign.
Where we are today

The Campaign for Brick

<table>
<thead>
<tr>
<th></th>
<th>Church</th>
<th>School</th>
<th>Undesignated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raised to Date</td>
<td>$8M</td>
<td>$7M</td>
<td>$125K</td>
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Overall Goal: $16 Million

Total Raised to Date: $15 Million

School’s Annual Appeal

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<tr>
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</thead>
<tbody>
<tr>
<td>Total Donations</td>
<td>$469K</td>
<td>$748K</td>
<td>$829K</td>
<td>$682K</td>
</tr>
<tr>
<td>Participation</td>
<td>80%</td>
<td>93%</td>
<td>92%</td>
<td>85%</td>
</tr>
<tr>
<td>Total # of Donors</td>
<td>209</td>
<td>184</td>
<td>203</td>
<td>222</td>
</tr>
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*Auction year
Important Features of the Campaign

- Inviting people to back the overall mission and vision of the campaign
  - Supported by Brick’s strategic plan

- Silent Phase
  - Weekly campaign meetings
  - Sequencing approaches
  - Briefing before asking
  - Good to great requests

- Public Phase
  - “The double ask”
    - Annual support plus extraordinary multi-year pledges
  - Open houses and class captains
Discussion
Discussion Topics

1. Strategies for engaging volunteers

2. Recognizing donors to both annual fund and campaign

3. Current environment for major gift fundraising
Thank you

Lydia Spinelli
Director
Brick Church School
lspinelli@brickchurch.org
www.brickchurchschool.org

Charlie Michaud
Principal & Managing Director
CCS
cmichaud@ccsfundraising.com
www.ccsfundraising.com