Turning Big Ideas into Action

James Kennedy, Director of Development, Regis High School
Eric Javier, Principal & Managing Director, CCS Fundraising
About Regis High School

Founded in 1914

Jesuit college prep education to Roman Catholic young men in NYC

534 students

$15 Million Annual Operating Budget

Only free private all-scholarship school in the US

special focus on making a Catholic education affordable to those who otherwise can’t afford it

Founded REACH, a middle school access program, in 2002

James Kennedy
Director of Development
’02 Regis High School Graduate
Leading fundraising consulting and management firm

More than 500 nonprofit clients each year

Diverse Client Sectors
- Independent schools
- Hospitals and medical centers
- Colleges and universities
- Religious institutions
- Civic and cultural organizations
- Environmental organizations
- Human services agencies

Comprehensive Services
- Feasibility & Planning Studies
- Campaign Management & Counsel
- Development
- Assessments/Audits
- Strategic Development Planning
- Board Development
- Training

Eric Javier
Principal & Managing Director
‘94 Regis High School Graduate

About CCS
<table>
<thead>
<tr>
<th>CCS Independent School Experience</th>
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<tbody>
<tr>
<td>The Allen-Stevenson School</td>
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<tr>
<td>New York, NY</td>
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<tr>
<td>Berkeley Carroll School</td>
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<td>Brooklyn, NY</td>
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<td>The Caedmon School</td>
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<td>New York, NY</td>
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<td>The Chapin School</td>
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<td>New York, NY</td>
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<tr>
<td>Christian Brothers Academy</td>
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<td>Syracuse, NY</td>
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<td>Friends Academy</td>
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<td>Locust Valley, NY</td>
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<td>Fontbonne Hall Academy</td>
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<tr>
<td>Brooklyn, NY</td>
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<td>The Green Vale School</td>
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<td>Glen Head, NY</td>
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<td>Horace Mann School</td>
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<td>New York, NY</td>
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<td>LREI</td>
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<td>New York, NY</td>
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<tr>
<td>Mary McDowell Friends School</td>
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<tr>
<td>New York, NY</td>
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<tr>
<td>Portledge School</td>
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<tr>
<td>Locust Valley, NY</td>
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<tr>
<td>Regis High School</td>
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<tr>
<td>New York, NY</td>
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<tr>
<td>Saint David’s School</td>
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<td>New York, NY</td>
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<td>The Spence School</td>
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<tr>
<td>New York, NY</td>
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<tr>
<td>St. Hilda’s &amp; St. Hugh’s</td>
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<tr>
<td>New York, NY</td>
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Today’s Agenda

1. Philanthropy: A Cornerstone of the Regis Culture and Identity
2. Why a Strategic Plan?
3. Why a Feasibility Study?
4. Takeaways: What did we learn from going through both a strategic plan and feasibility study process?
5. Questions and Discussion
Philanthropy:
A Cornerstone of Regis’s Culture and Identity
History of Regis

• Founded in 1914 by an anonymous benefactor and supported by the generosity of her family, alumni, and friends

• She was a generous parishioner of the Church of St. Ignatius Loyola and in her will, gifted funds to pastor Rev. David W. Hearn, S.J. to purchase land and build the school, with the promise to continue financial support to ensure tuition-free education.

• From 1914 – 1960s, the Foundress’s family regarded Regis as their private charity.

• With the reluctant approval from her family, the school began seeking philanthropic support from alumni in the 70s.
Fundraising Over Time (Ideal)

$\text{Campaigns}$
Fundraising Over Time (Ideal)

$ \text{Campaigns}$

TIME

$
Arc of a Successful Campaign

Strategic Planning
- Affirm mission
- Future vision
- Strategies
- Financial plan

Feasibility Study
- Test case
- Goal
- Timeline
- Strategy
- Resource / Staffing

Organizational Phase
- Solidify Case
- Prospecting
- Naming / Recognition
- Campaign Cabinet
- 20-30% of goal

Leadership & Major Gifts
- Lead gifts
- Board gifts
- Steering Committee
- Cultivation
- 70-80% of goal

Public Phase
- Public launch
- Communications
- Participation
- Stewardship
- Over goal
Why a Strategic Plan?
Why a strategic plan?

In 2014, Regis celebrated its Centennial Anniversary with the *Strong to Endure Campaign*

- *Strong to Endure* was a celebration of the past and how far the school has come
- Two other past campaigns also raised funds for the endowment
- After *Strong to Endure*, it was time to think towards the future!
Regis’s First Strategic Plan
(September 2017 – February 2018)

✓ An opportunity to plan for the future

✓ Timeliness

✓ In a unique position

✓ A lot that could be accomplished

✓ 2024: The Second Decade of The Second Century
The Strategic Plan Process

Organize
- Steering Committee Meeting #1
- Recruit Task Teams and Conduct Meeting #1
- Invite Constituency Group Participants

Community Input
- Constituency Focus Groups (Town Hall Meetings)
- E-Survey

Task Team Work
- Task Team Meetings #2 & #3
- Steering Committee Meetings #2 & #3

Recommendations
- Steering Committee Meeting #4
- Compile Inputs
- Identify Themes
- Develop Recommendations for Board Review

Board Consideration
- Review Recommendations

September - October
October
November - December
January
February
Who did we engage?

- Board of Trustees
- Steering Committee
- Task Teams
- Constituency Groups
  - Parents
  - Faculty / Staff
  - Alumni Parents
  - Alumni
  - Students
Task Teams

Academic Life / Technology

Enrollment / Admissions

Facilities

Financial Affairs

Global Citizenship

REACH

Spiritual Life

Student Life
How did we seek feedback?

- Constituency Groups
  - 6 Town Halls & E-Survey

- Task Teams:
  - 3 Meetings

- Steering Committee (Chair and Co-Chair of each Task Team):
  - 4 Meetings
Engagement was inspiring!

<table>
<thead>
<tr>
<th>Constituency Groups</th>
<th>Town Hall Meeting Attendees</th>
<th>E-Survey Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni</td>
<td>52 (between two nights)</td>
<td>1,388</td>
</tr>
<tr>
<td>Alumni Parents</td>
<td>26</td>
<td>362</td>
</tr>
<tr>
<td>Faculty / Staff</td>
<td>45</td>
<td>60</td>
</tr>
<tr>
<td>Parents</td>
<td>47</td>
<td>392</td>
</tr>
<tr>
<td>Students</td>
<td>~30</td>
<td>302</td>
</tr>
<tr>
<td>Not Indicated / Other</td>
<td>N/A</td>
<td>514</td>
</tr>
</tbody>
</table>
Results:

Four Initiatives to Ensure Regis’s Continued Excellence

1. **MAGIS**
   - Invest in a *second century of academic excellence and service* to and with others

2. **MISSION-DRIVEN COMMUNITY**
   - Identify, attract, and inspire *exceptional and diverse students and faculty*

3. **CURA PERSONALIS**
   - Support *student success*

4. **MEN FOR OTHERS**
   - Cultivate Catholic leaders committed to *social justice*
Why a Feasibility Study?
Why a feasibility study?

An effective study helps answer **critical questions** about development processes and potential fundraising initiatives.

- **GOAL**
  What is an attainable goal for a potential campaign?

- **TIMING**
  Is now the right time to proceed with a campaign?

- **LEADERS**
  How could the campaign inspire current and potential donors to lead?

- **CASE**
  What aspects of the campaign resonate with donors?

- **PROSPECTS**
  How can you engage new donor audiences for this campaign?

- **PLAN**
  What resources and approach will lead to success?
What goes into a study?

MONTH 1
- Internal Discussions

MONTH 2
- Case Development
- Data Review and Analytics
- Study Committee

MONTH 3
- External Interviews

MONTH 4
- Study Committee
- Recommendations
Confidence in the plan and proposal improved tremendously from the first Study Committee meeting to the second at the end of the study.
How did we turn BIG IDEAS into ACTION?

✓ We identified, prioritized, and got feedback on key strategic goals.

✓ We elevated sights and inspired an increased sense of ownership in the future of Regis.

✓ Donors were more engaged.

✓ Many indicated plans to increase their philanthropic support in the future.

✓ Many said they would be willing to volunteer during a campaign.
Study Participants

Each participant is counted by primary constituency

<table>
<thead>
<tr>
<th>Constituency</th>
<th># of Participants</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trustees</td>
<td>11</td>
<td>15%</td>
</tr>
<tr>
<td>Alumni</td>
<td>43</td>
<td>59%</td>
</tr>
<tr>
<td>Current Parents</td>
<td>12</td>
<td>16%</td>
</tr>
<tr>
<td>Alumnus Parents</td>
<td>7</td>
<td>10%</td>
</tr>
<tr>
<td>Total</td>
<td>73</td>
<td>100%</td>
</tr>
</tbody>
</table>

Each participant is counted by primary constituency.
# Campaign Leadership

<table>
<thead>
<tr>
<th>Would You Be Willing To:</th>
<th>Yes</th>
<th>CCS Average*</th>
<th>Maybe</th>
<th>CCS Average*</th>
<th>No</th>
<th>CCS Average*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serve as a leader?</td>
<td>30%</td>
<td>24%</td>
<td>40%</td>
<td>21%</td>
<td>30%</td>
<td>55%</td>
</tr>
<tr>
<td>Serve on a committee?</td>
<td>53%</td>
<td>44%</td>
<td>28%</td>
<td>24%</td>
<td>18%</td>
<td>32%</td>
</tr>
<tr>
<td>Host a dinner or reception?</td>
<td>58%</td>
<td>45%</td>
<td>27%</td>
<td>19%</td>
<td>15%</td>
<td>36%</td>
</tr>
<tr>
<td>Identify prospects / make introductions?</td>
<td>62%</td>
<td>62%</td>
<td>24%</td>
<td>17%</td>
<td>14%</td>
<td>21%</td>
</tr>
<tr>
<td>Solicit a few gifts?</td>
<td>34%</td>
<td>41%</td>
<td>21%</td>
<td>21%</td>
<td>45%</td>
<td>38%</td>
</tr>
<tr>
<td>Make a gift?</td>
<td>84%</td>
<td>80%</td>
<td>14%</td>
<td>13%</td>
<td>2%</td>
<td>7%</td>
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*CCS private / independent school average
Study Indications Compared to Last Campaign

REDACTED
Campaign Leadership

Organizational Phase
- Campaign Co-Chairs
- Campaign Cabinet

Leadership Phase
- Campaign Co-Chairs
- Campaign Cabinet
- Campaign Steering Committee

Major Gifts Phase
- Current Parents Committee
- Alumnus Parents Committee
- Alumni Committee

Community Phase
- Decade Chairs
- School Ambassadors
# Campaign Plan

<table>
<thead>
<tr>
<th>Phase</th>
<th>March 2019 – August 2019</th>
<th>September 2019 – August 2022</th>
<th>September 2022–August 2023</th>
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<tbody>
<tr>
<td><strong>Organizational Phase</strong></td>
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<tr>
<td><strong>Leadership Gifts Phase</strong></td>
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<tr>
<td><strong>Major Gifts Phase</strong></td>
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<tr>
<td><strong>Community Phase</strong></td>
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<tr>
<td><strong>Annual Fundraising (ongoing)</strong></td>
<td></td>
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*Pledges payable up to a 5-year timeframe*
Questions and Discussion