The Annual Giving Appeal: Exploring Effective Communication Strategies

Session Facilitator: Gabrielle Gilliam P'21
Director of Development
Poly Prep Country Day School

2012 NYSAIS Institutional Advancement Conference
June 19, 2012
The Annual Giving Appeal: Exploring Effective Communication Strategies

OVERVIEW

• FIRST & FOREMOST
• THE APPEAL
• OPEN DISCUSSION
FIRST & FOREMOST:
Name Your Fund

The Poly Fund
The Stuart Fund
The Mary McDowell Friends Fund
The McDonogh Fund
The Churchill Fund
FIRST & FOREMOST: Determine and Explicitly State Goals

- Dollar Amount
- Participation
- Timeline

“Done in 31” or “31 and Done”

December 31

Fiscal Year End
FIRST & FOREMOST: 
Craft Your Case

• Connect the hearts of your Parents/Alumni to the core of your mission (courtesy of Independent School Management)

“The **fulfillment of our aspirations** for our students will be possible because of Park's **strong financial foundation** and our community's **ever increasing generosity** to Annual Giving and Planned Giving.”

-- The Park School

(http://www.parkschool.net/community/index.cfm)
FIRST & FOREMOST:  
Craft Your Case

• Be Explicit about Impact

“McDonogh School's operating revenue comes from three main sources: tuition payments, endowment income, and gifts to The McDonogh Fund. Together the three revenue streams allow McDonogh to provide a signature education that is unmatched anywhere in the area. From our scenic campus, to our unparalleled faculty, to our outstanding facilities, a McDonogh education is a special experience.” – McDonogh School

(http://www.mcdonogh.org/c/parents-students/support-mcdonogh)
FIRST & FOREMOST:
Craft Your Case

• Don’t be afraid to make the ask

“All parents who send their children to OLMC are expected to participate in fund raising activities to support the School.” -- Our Lady of Mount Carmel

(http://www.olmcboonton.org/school/parents/fundraising.htm)
**FIRST & FOREMOST:**

*Craft Your Case*

- Be specific about time-frame

> “Gifts made by December 31 provide maximum benefit to our students and overall academic programs. [Make a gift online now!](http://www.brynmawrschool.org/page.aspx?pid=424) The Annual Fund opens on July 1 and closes on May 31 each year.” – The Bryn Mawr School

(http://www.brynmawrschool.org/page.aspx?pid=424)
FIRST & FOREMOST: 
Craft Your Case

• Be specific about time-frame

“Every fall we ask for a gift or a pledge payable by June 30. **Financial support early in the school year provides actual budget dollars instead of budget projections**, and allows us to remain flexible in meeting current needs.”

– Chatham Day School

(http://chathamdayschool.org/pages/Annual-Fund.html)
FIRST & FOREMOST
CASE STUDY: The Stuart Fund
The Stuart Fund

Our 2011-2012 Stuart Fund Campaign, themed “Invest in Leadership” is underway!

This year’s Stuart Fund goal is $500,000 and every gift, regardless of size, makes a positive impact at Stuart. While the amount of money raised is critical, so too is the level of participation; as always the goal is to reach record-high participation from all constituencies.

A successful Stuart Fund directly enriches this educational experience for every child, every day. The funds from the Campaign support our School’s operating budget and enhance the academic, athletic and artistic programs, as well as the scholarship and financial aid offerings.

Janet Erskine Stuart said, “The way to do much in a short time is to love much. People will do great things if they are stirred with enthusiasm and love.” With your enthusiasm and love for Stuart and for Sacred Heart education, we can do great things.

Make your investment today.


The Janet Erskine Stuart Society

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THE APPEAL

• Establish Purpose
• Establish Theme
• Explore & Exploit a Variety of Methods
THE APPEAL

• Purpose
  • Mission-Based
  • Project/Priority-Based
MISSION-BASED CASE: The Mary McDowell Friends Fund
“Let Your Life Speak” Campaign

• Mission Statement
Mary McDowell Friends School is an independent Quaker school for students with learning disabilities. As its guiding principle, MMFS believes that every student with learning disabilities can learn with the support of a community dedicated to specialized teaching, cooperation, and respect. MMFS's approach is grounded in the Quaker values of respect for individuals, personal and social responsibility, peaceful resolution of conflict, the importance of diversity, and the value of service. Challenging and building on the strengths of each individual, Mary McDowell Friends School cherishes the uniqueness of every student.
**Mission Statement**

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Mary McDowell Friends School is committed to an educational partnership between faculty and parents. It serves as a resource to provide information about learning disabilities to professionals, parents, and the community.
MISSION-BASED CASE: The Mary McDowell Friends Fund

“Let Your Life Speak” Campaign

Case Statement for Giving

Every child deserves to learn, to grow, and to reach his or her full potential. Mary McDowell Friends School believes that, too. Now in its 27th year, the School's innovative educational program has embraced each child's individuality, offering specialized resources that nurture learning and foster community. And, with the Quaker tradition serving as the school's foundation, each child's true development takes root. Potential broadens, confidence increases, and our children - and their families - know it. Their smiles give them away.
"Let Your Life Speak" - Giving to Mary McDowell Friends School

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MISSION-BASED CASE: The Mary McDowell Friends Fund

“Let Your Life Speak” Campaign

• Appeal Statement

"Let Your Life Speak" by making a gift today to The Mary McDowell Friends Fund. Your contribution provides direct funding for educational initiatives that tuition alone does not cover. It is an investment in the education of every student at MMFS. Your gift sends a message that you believe in the purpose and you believe in the program that is offered to every student enrolled at MMFS. "Let Your Life Speak" - Giving to Mary McDowell Friends School
The Mary McDowell Friends Fund

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Your gift to The Mary McDowell Friends Fund helps to support:

- A staff-to-student ratio of almost 1:3 so that each student receives the individual attention and specialized support that s/he needs;

- An exceptionally talented and dedicated staff who is the heart of our school; currently 82 full-time and 10 part-time staff;

- Innovative and challenging curricula designed specifically for students with learning disabilities;

- State-of-the-art interactive educational computer technologies to facilitate learning for all students;

- Visual arts, music and theater to enrich students' learning experiences;

- Faculty professional development to support new curricula, and training to maximize the integration of new technology into the classroom;

- Coaches' salaries, uniforms and transportation for the Lightning teams;

- Tuition assistance to ensure the diversity of our student body - diversity enriches the learning experience for all our students.

No gift is too small, and every gift counts. Even in these difficult economic times, please think carefully about what you can give, and do what you can afford to do. Gifts can be planned to continue your support beyond your lifetime. Please contact us if you have questions about giving to MMFS.
THE APPEAL -- PURPOSE

• Project/Priority-Based
  • Family of Funds
    • Allows donors to designate their gift to established operational priorities
    • A matter of stewardship vs. accounting as only approximately 30% of donors will actually ‘restrict’ their gifts this way (source: Marts & Lundy)
    • Through a noted caveat, indicate that should a fund become oversubscribed, gifts will be directed to the “Greatest Needs” Fund.

CASE: Poly Prep Family of Funds
The Poly Fund 2011-2012

HOW CAN YOU SUPPORT POLY?

Make a gift to The Poly Fund, which benefits every student and supports essential school programs. Our new Family of Funds (below) enables you to direct your gifts to areas that interest you, such as:

Academics & Programs

Whether by helping us purchase smartboards and other state-of-the-art instructional technology, new library books, musical instruments, or by underwriting classroom visits from accomplished professionals in literature, science, the arts, business and government, your gifts mean the Poly experience will be second to none.

Faculty & Teaching

With your help, Poly can invest in our outstanding faculty's professional growth and development, fostering first-rate teachers who mentor students and inspire them to learn and excel.

Campus & Facilities

Poly operates two beautiful campuses in Brooklyn—our 25-acre Dyker Heights facility and our landmarked, LEED-certified Park Slope building. Each campus provides a secure urban oasis where students grow and thrive. Give so we can maintain and modernize our historic campuses for the 21st century.

Arts

Taught by accomplished professionals, our arts program encourages student creativity and self-expression through vocal and instrumental music, visual arts, theater, and dance. Your gifts nurture our students' imaginations.

Athletics

Poly's physical education curriculum promotes leadership, character, self-confidence, and mental and physical health. Your support means Poly athletes can reap the benefits of teamwork and competition, whether they win or lose.

Greening

Help “Blue & Gray Go Green!” We are committed to integrating the environment and sustainability into our curriculum. We also seek to incorporate sustainable practices into the school's energy use, waste disposal and recycling, campus maintenance, and food service. But these vital greening projects require your donations.

Greatest Needs

Your unrestricted gifts help upgrade classrooms and labs, provide scholarships, ensure recruitment and retention of the best possible faculty, and meet pressing, unanticipated needs during the school year.
THE APPEAL -- PURPOSE

• Project/Priority-Based
  • Identifying a major operational need of the school
    • Allows the school to highlight a specific giving opportunity that is still within the scope of operational needs
    • Additional unrestricted needs can still be supported

CASE: Lausanne Collegiate School
“Come to the Table” Campaign
“Come to the Table”
Lausanne
Annual Giving
2011 - 2012

It’s time to “Come to the Table.”

When we call our children in from play with those words, we know that it is time for our family to share a meal together and to share the successes and challenges of our day. It is a special time for us — although brief, it helps us focus on each other and our family.

We believe that our students’ noontime experience should also be a time not only for a healthy meal but also for building the strength of our community. Tully Dining Hall has served our students since Lausanne moved to our West Massey location 50 years ago. Now, with our school reaching a record enrollment, it’s time to provide a pleasant visual and auditory space that encourages healthy interaction among students within a calm, comfortable atmosphere. That’s why funds generated through annual giving this year will be directed towards the renovation of the serving lines and dining hall so that our students can congregate and “come to the table” together in community.

Annual gifts can also be directed towards financial aid for the 2012-13 school year, faculty professional development and campus co-curricular programs such as arts and sports programming. Financial aid allows us to bring in students that could not otherwise experience the learning environment our children receive every day. Faculty development assists our faculty in the exploration of new techniques for the classroom and in-depth study of subject matter.

Those who belong to our globally-minded community have many gifts to share, whether it is through gifts of time, talent or treasure. All can help our students grow academically, physically, culturally and socially.

Finally, a walk through our dining hall at noon on any given day is a journey through an incredible mosaic of cultures and traditions. Sights and sounds include the smiling faces and conversations of children whose family traditions are as diverse as the flags that decorate the ceiling. We are privileged that all of these children have joined us “at the table.” That’s why we invite you to “come to the table” and partake in the “feast” of the Lausanne experience, all for the benefit of the children we love.

Bon Appetit

Catherine and Tim Nicholls
Charlie ‘00 and Norman ‘16

Please click here to make a pledge or click here to make a gift.

Last year your gifts funded

- Security System including cameras, fencing, burglar alarms, card access on all doors and gates, and exterior signage updates
- Waterfront Improvements for Blue Heron Lake
- Financial Aid for the 2011-2012 school year
- Continuing education for our faculty
- Support for the arts and athletics

THANK YOU!

Gracias!
谢谢!
THE APPEAL -- THEME

• What is the Theme?
  • The theme is the thru-line which creates cohesion throughout all of your campaign materials
THE APPEAL -- THEME

• Theme Ideas
  • Teaching & Learning
  • Academic Program
  • Co- and Extra-Curricular Programs
• Mission Keywords
  • Character
  • Global Learning
  • Service Learning
  • Faith-Based Ideals
THE APPEAL -- METHODS

- Direct Mail
  - Brochure
  - Letter
- Email
- Video
- Social Media
THE APPEAL -- METHODS

• CASE STUDY: The Poly Fund 2011-2012
  • State the Case for Giving
    • Mission-Based: “Without you, we cannot fulfill our mission to prepare and inspire the next diverse generation of leaders and global citizens to act with intelligence, imagination and—above all—character.”
  • Define Purpose
    • Family of Funds
  • Incorporate Theme
    • “Light Bulb Moments”
THE APPEAL -- METHODS

- CASE STUDY: The Poly Fund 2011-2012
  - Direct Mail
    - Brochure
THE APPEAL -- METHODS

• CASE STUDY: The Poly Fund 2011-2012
  • Email
    • Use as reminder to give
    • Use to update the community on campaign progress
If You Have Already Made Your Gift
To The Poly Fund, Thank You!
If Not, Please Make Your Gift Today!

Don’t Forget To Give Before The Tax Year Ends!

THINKPOLY. THINKPOLYFUND.
2011-2012

Make a gift at www.polyprep.org/give
WHATS YOUR CLASS RANK?

Compare your class's gifts with your peer classes. Are you at the top? Click here to find out!

Top 5 Classes by Parent Participation

- 222: 44%
- 2013: 33%
- 2018: 32%
- 2024: 32%
- 2021: 31%

Make a gift at www.polyprep.org/give
THE APPEAL -- METHODS

• Social Media (Facebook, Twitter, YouTube)
  • Major Benefit is that people “Opt In”
  • Facebook and Twitter are especially helpful to use to update on progress of annual giving as well as challenge campaigns (less ‘annoying’ than email)
THE APPEAL -- METHODS

• Social Media (Facebook, Twitter, YouTube)
  • Use these tools to educate your constituency
    • How Your Gift Helps (List tangible support: Smartboards, Laptop Carts, Musical Instruments, Art Supplies, etc.)
    • Top Five Reasons to Give to the Annual Fund
    • Highlight Faculty Professional Development
If you haven’t already made a Poly Fund gift this year, donate to the Poly Fund—from May 1 through May 15—and leverage additional challenge gifts from 3 generous Poly families!

Your Participation Counts: 15% More Parent Donors by May 15th = $15,000 for the Poly Fund.

For more information, click here: www.polyprep.org/goldrush.
Poly Prep @polyprep
Michael McAloon '15 being congratulated on receiving the Russell Trauerts Memorial Trophy. pic.twitter.com/6DNTUN9Q

Poly Prep @polyprep
Michael Correr '87 made a challenge! Michael will give $15K if alumni participation rises 5% by 6-15. Give today! polyprep.org/give

Poly Prep @polyprep
Poly is Academic Excellence! Middle & Upper Schoolers Win 75 National Latin Exam Prizes and Compete Globally bit.ly/IYUEdj

Poly Prep @polyprep
Poly is Diversity! Today, the Upper School Women's Rights group meets @ 2 PM to discuss Judy Chicago's famous Dinner Party art installation.
THE APPEAL -- METHODS

• CASE STUDY: The Poly Fund 2011-2012
  • Video
Remember when you were in school?

Remember your favorite teachers? What about the first time you solved an equation, parsed a difficult Latin verse, learned why the Civil War broke out, or outsmarted the opposing team?

Can you recall the thrill you felt when you first learned to read, write, or multiply?

As educators, artists, coaches, and mentors, we live these student epiphanies every day. Some of us call them “light bulb” moments.

To learn why, click here or on the video below.
THE APPEAL –
Best Practices

- Ensure Parent and Alumni messages are similar in core idea but target the constituency
Goal
$550,000
$451,477

Start

Top 5 Classes by Parent Participation
as of 5/23/12

Parent Participation by Class
as of 5/23/12

THINK POLY. THINK POLY FUND.

IF YOU ALREADY GAVE TO THE POLY FUND, THANK YOU IF NOT, HELP BOOST YOUR CLASS RANK. GIVE TO POLY NOW!

LEARN MORE ABOUT THE POLY FUND

SUPPORT THE POLY FUND

Without you, we cannot fulfill our mission to prepare and inspire the next diverse generation of leaders and global citizens to act with intelligence, imagination and above all, character.

The Poly Fund is crucial to ensuring that every student—their needs and aspirations—is supported by a full array of resources. The Poly Fund provides unrestricted support for the Poly Fund provides unrestricted support for the Poly Fund provides unrestricted support for the Poly Fund provides unrestricted support for the Poly Fund provides unrestricted support for the Poly Fund provides unrestricted support for the Poly Fund.

You can designate gifts as "budget relieving," available for Poly's greatest needs. You may also designate your Poly Fund gift for a particular purpose via the Fund.

Without your support of the Poly Fund, tuition would have to increase significantly. The best independent schools in America all benefit from a strong culture of parent giving. Your participation encourages other parents to give. Your gift also demonstrates to the entire Poly community that you believe in the school and have invested in our success.

Give to Poly as we can offer your child the finest academic, arts, and athletics in the entire city.

THINK POLY. THINK POLY FUND!

LEARN MORE ABOUT OUR "FAMILY OF FUNDS"

REMEMBER WHEN YOU WERE IN SCHOOL?
**Goal**: $500,000

**Progress**: $356,064 as of 6/07/12

**Start**: $0

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**Top 5 Classes by Alumni Participation**

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**Alumni Participation by Class**

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STEAL THIS IDEA!

• Let Others Speak for You! Testimonials are especially compelling.
Alumnae Giving Honor Roll

Purnell’s alumnae are a generous group of women who give back because they know their gifts can make a difference in the lives of today’s students.

Scroll over the photos below to read stories of inspiration from all classes of alumnae. Make a Gift Online. Add your photo by sending it to photos@purnell.org. Share your reason for giving on the Online Giving Page. Inspire others and support our students. Thank you.

I support Purnell because Purnell helped me so much throughout my time there. I could not be where I am now without the great support and encouragement I received while I was a student.
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Purnell is a wonderful school that was a major positive influence in my formative years. I am pleased to give so others can have the same.
Why Do Parents Give to the Poly Fund?

PolyPrepCDS  Subscribed  54 videos

Uploaded by PolyPrepCDS on May 24, 2011

No description available.
THE APPEAL –
Best Practices/Open Discussion

- Posters?
- Giving Trees?
- Challenge Campaign Ideas?
- What NOT to Do?