



Re-Thinking the Head of School's Role in Development

The Prizmah National Conference: Dare to Dream

Monday, March 11, 2019 5:00 pm – 6:15 pm

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Session Goals

Explore how a busy HOS finds the time to cultivate, solicit and steward top donors

Examine development supervision

Discuss the board partnership

Prioritize the development hour

Create short term goals



Relationship-Based (vs. Transactional) Fundraising

Finding people who believe in what we do and engaging them in our efforts to strengthen our schools

The Life Cycle of a Donor





The Secret

Link the donor's philanthropic interests to the school's needs

(you cannot do this effectively
without building a relationship)



People will support the organization that
loves them the most.

Definitions

SOLICITATION

is a **once a year**,
one-step, one-ask,
one-dimensional contact.

CULTIVATION

is a **year round**,
gradual, open-ended,
multi-dimensional process.

Moves Management: Moves You Can Use

(E)MAIL

with a personal note:

- Articles
- Video
- Photos
- Annual report
- Books
- Newsletters
- Resources
- Holiday cards

MEET

- HOS/Board President
- Principal/ Dept. Chairs
- Students/Alumni
- Key donors
- Board members
- Committee leadership

INVITE


them to join you for:

- Shabbat dinner or lunch
- Lectures and/or cultural events
- Golf or tennis
- School event/performance
- Donor recognition events

EXPERIENCE

- Tour the school
- Shabbaton
- Committee/board meeting
- Annual meeting/graduation
- Tikkun olam event
- Class or program

Moves management: A series of contacts over time that aim to move the prospect from awareness to commitment



Stewardship Segmentation

1

All Donors

2

Major Donors

3

Leadership

4

Address objections

Stewardship Segmentation

Market One – All Donors

- Non-negotiable; everyone gets it
- Gift acknowledgements
- Newsletters, annual reports
- Special events
- Personal letters (within 72 hours) and phone calls
- Low cost – high efficiency
- Constant and professional

Market Two – Major Donors

- Donor recognition circles and events
 - ED/Rabbi/HOS/BP access
- Naming opportunities
- Leadership development & training
- Personal visits; site visits
- “Opportunity” to serve as a solicitor
- Customized, visible, investment of time
- Engage in cultivating others

Stewardship Segmentation

Market Three – Leadership

- HOS/BP/DoD/ED access
- Breaking news
- Inner circle
- Board meetings as tools to educate and inspire the board

Market Four – Mega Donors

- Individualized plans
- Sophisticated recognition
- Deep involvement with ED/HOS/ DOD/ BP, etc.

The Stewardship Calendar: by Giving Level

ANNUAL GIVING LEVEL	Thank in Quarterly Newsletter & Dinner Program	Special Recognition in Annual Report /on Website	Personalized End-of-Year Card with Student Artwork	Inclusion on Donor Wall	Group Donor Recognition Event	Chai Society Ceremony	VIP Reception at Annual Dinner	ED/Rabbi/ HOS Roundtable/ Coffee
\$50,000+	✓	✓	✓	✓	✓	✓	✓	✓
\$25,000 - \$49,999	✓	✓	✓	✓	✓	✓	✓	✓
\$18,000-\$24,999	✓	✓	✓	✓	✓	✓	✓	
\$10,000 - \$17,999	✓	✓	✓	✓	✓			
\$5,000 - 9,999	✓	✓	✓					
\$2,500 - \$4,999	✓	✓						
\$1,800 - \$2,499	✓							

The Stewardship Calendar: by Individual

Top Donors and Prospects	Rosh Gift	Email	Invite to Fall Event	Lunch	Solicitation	Classroom Event	Pesach Gift	Graduation Invite
Schiffmans	✓	✓	✓	✓	✓	✓	✓	✓
Londons	✓	✓	✓	✓	✓	✓	✓	✓
Goldbergs	✓	✓	✓	✓	✓	✓	✓	
Stratfords	✓	✓	✓	✓	✓			
Millers	✓	✓	✓					
Schwartz	✓	✓						
Weil	✓							

The Challenges

- I'm not sure this is my role...
- Not enough time
- Board won't cooperate/partner
- I don't know how
- Uncomfortable speaking to parents
- No stature with people of wealth
- I have no help



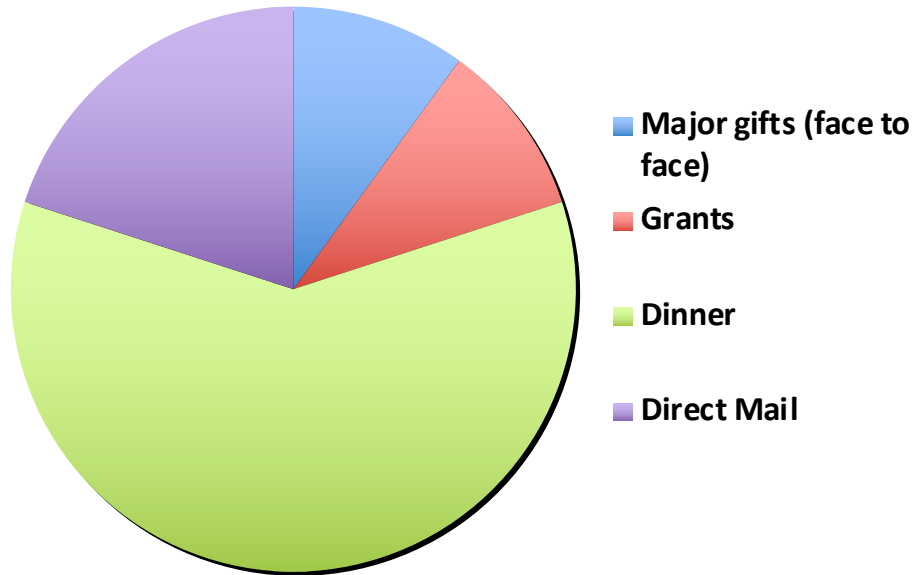
Development Teams: State of the Field

- Development teams = high turnover and long vacancies
- DoD vacancy rates = ~6 months
- 50% anticipate leaving jobs in < 2 years
- 40% not committed to careers in development
- Most report weak relationship with the HOS; lack of regular supervision

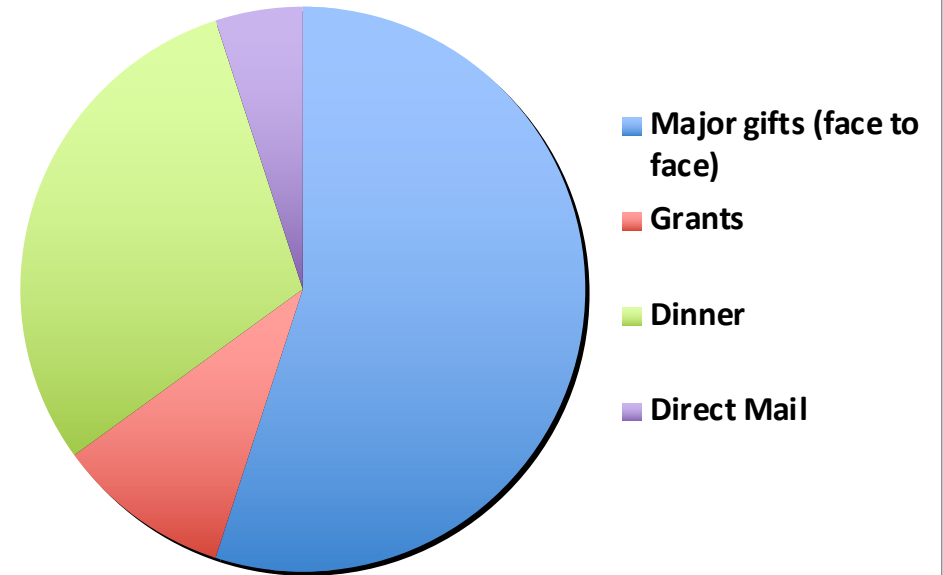


How They Divide It Up

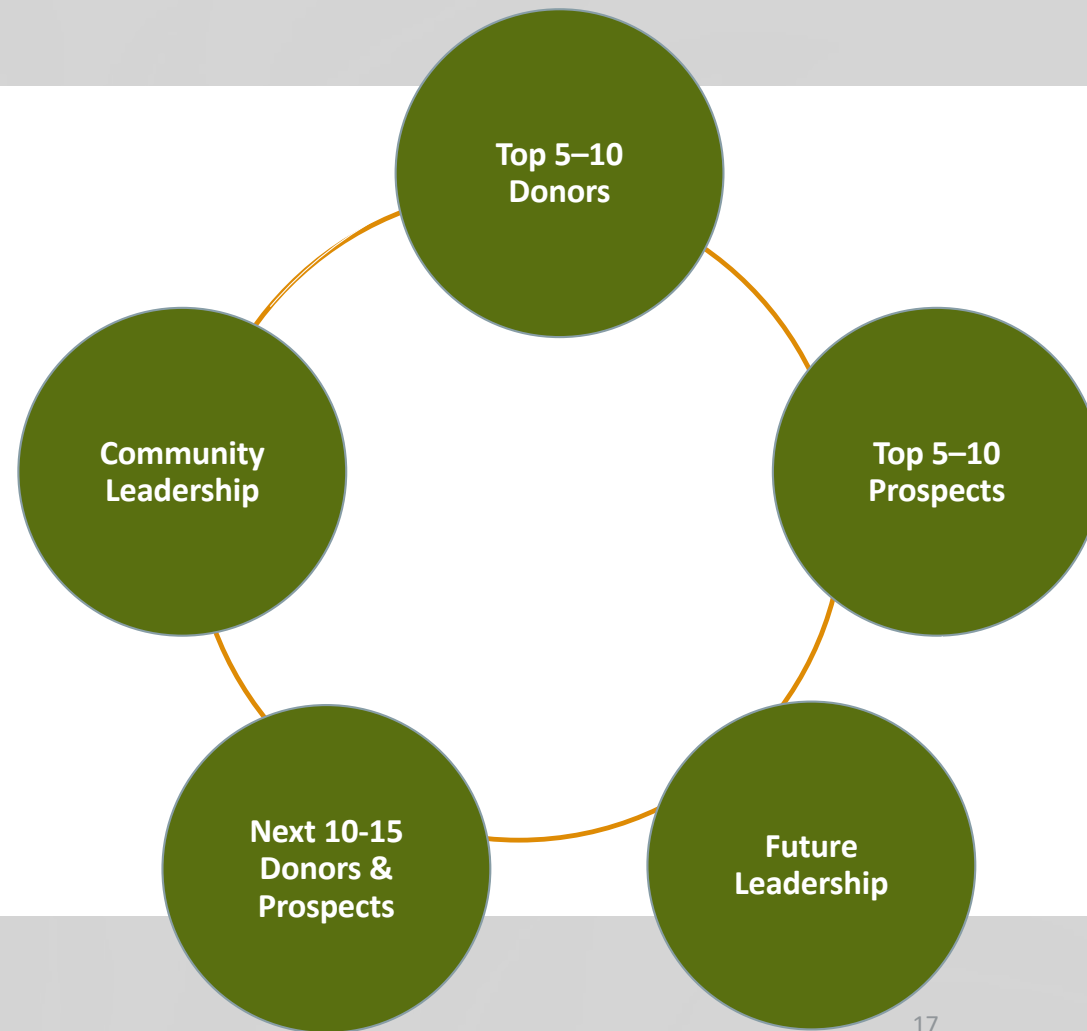
My Time



Dollars (as a % of campaign revenue)



Campaign Development:
**Where should
the hours go?**



Managing The Team

**Strategic
campaign
planning &
goal setting**

**Resource the
development
team**

**Weekly:
cultivate,
steward,
solicit,
supervise**

**Weekly:
development
reports –
data analysis**


**Set
manageable
personal goals
(2 mtgs.
/month)**

**Dump the
events –
relationship
vs.
transactional**

**Utilize
development
committee
and board**

**Train the
team**

**Let them
manage up**



You as Team Leader: Developing a Culture of Philanthropy

**Leadership: ambassadors
and relationship-builders**

**Everyone promotes philanthropy;
Can articulate a case for giving**

**Development is valued as
mission-aligned program**

Systems established to support donors

**Board is committed,
personally involved in fundraising**

You set the stage

Discussion Questions

1

What would you change about your development program?

2

How often could you be out of the office meeting with donors and prospects?

3

What are your 2 biggest challenges in managing/ supervising the development team?

4

What role could you be playing in development (that you're not playing now)?



Thank you!

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