

Mission Possible.

Inspiring Trustees and Key Leadership  
to Support Advancement

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# What I've learned over the years:

1. Yes, it can be frustrating, I get it.
2. Meet each trustee where they are at
3. It's okay if your board doesn't want to solicit gifts. Really.
4. Celebrate and recognize the trustees publically that help support advancement
5. Your HoS and Board Chair are your biggest champions
6. Find other key leaders that will help you with your work

## Set yourself up for success. Start with the Committee on Trustees.

- Does your school have a Committee on Trustees or similar committee?
- Do you have a seat at the table?
- Does the committee have a brit/covenant/contract? What does it state?
- Do you help identify, cultivate and nominate leadership for the board?
- Do you assist in the onboarding of new trustees?

# Now, let's talk about the board. Inform and Ask for Support. Rinse and Repeat.

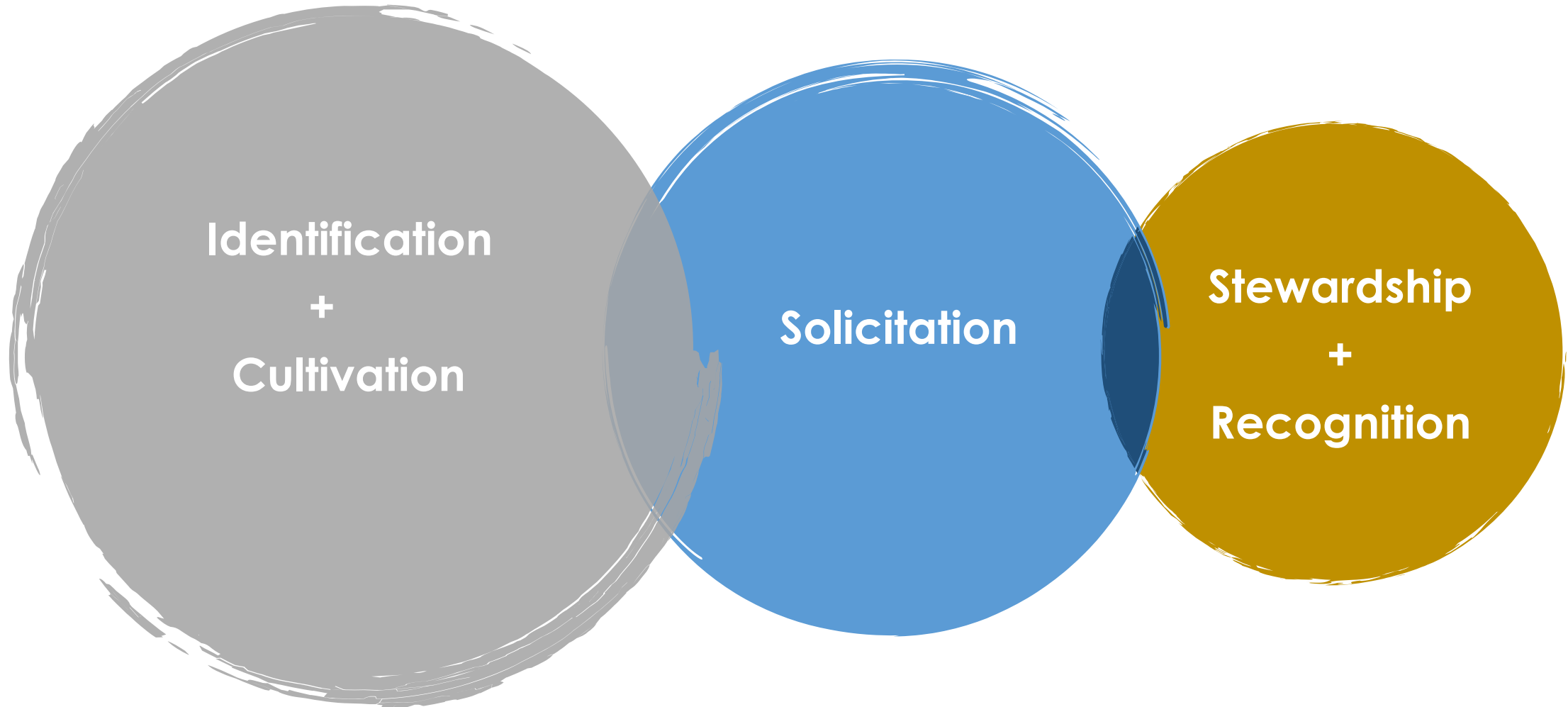
- Set Clear Expectations
- Meet the Board Event
- Onboarding New Trustees
- Board Retreat
- Board Meetings + Advancement Report
- Board Training

# Board training, my advice to you...

- Keep it simple, be specific
- Make the task easy
- Offer concrete ideas
- Celebrate Successes



# Board Training- The Development Cycle



## SDJA Development | Trustee NAME

Notes:

Identification	Cultivation	Solicitation	Stewardship	Recognition
<b>Assist Advancement team in the identification of donors who can support SDJA above tuition dollars</b>	<b>Assist in learning more about the donor/foundation and helping to make the connection with the donor</b>	<b>Understand the capacity of a donor and solicit a meaningful gift, and/or help coordinate a meeting between the donor and a solicitor</b>	<b>Demonstrate appreciation for the donor and continue to express gratitude and recognize them for their generosity</b>	<b>Help recognize donors for their major investment in your school, celebrate and honor them individually and at events</b>
Meet with Rachelle to identify new gifts to SDJA from SDJA parents, grandparents, alumni, parents of alumni students, etc.	Invite the donor to take a tour of SDJA	Participate in the annual campaign as an active solicitor and parent captain	Make individual calls to thank donors for their support of SDJA	Author a column in the school newsletter that recognizes a special donor for a specific major gift made to the school.
Leverage contacts outside of SDJA to identify community partners that can support SDJA	Invite the donor to meet with HoS or Senior Leadership team to learn more about a specific program or project	Assist in major donor dinners and solicitations	Deliver special gifts with a personalized note to thank donors for their gift	Participate in the annual “Donor Appreciation Week” that celebrates and honors all donors
Identify new Foundations that typically give towards Jewish education, Israel, security, technology, science, innovation, etc.	Extend an invitation to meet with the donor at his/her home or office to learn more about their interests.	Participate in a phone-a-thon to capture all end of the year gifts not made in the annual campaign	Send a personal note to a donor to update them on a specific program of interest	Host an event at your home that recognizes donors that have made a gift for 10 consecutive years
Assist in connecting with new corporate partners that can support SDJA	Host a dinner/reception at your home	Author an appeal to a specific constituent (parents, past trustees, alumni parents, etc)	Send regular emails and make frequent calls to keep the donor updated on all things SDJA	Author a column in the school newsletter that recognizes a special donor for a specific major gift made to the school.

## SDJA Board Stewardship Plan | Trustee NAME

Notes: Each month, Rachelle will remind you to connect with your major donors. At each board meeting, 2-3 trustees will share results from their calls, conversations, and stewardship efforts.

*\*When you learn more about your donor and their specific interests, please remember to share the information with the Advancement team.*

Name	Spouse Name	Home Phone	Cell Phone	Spouse Cell Phone	Email	Spouse Email	Notes
Barry		(760) -----	(619) -----				Has 2 sons Charles and Aiden enrolled at SDJA, cares about security and investing in our teachers.
Shari	Fred	(858) -----	(619) -----				Past Board President, Parent of 2 alumni, Current Parent, passionate about Israel, Israel advocacy and athletics.

Name	August	September	October	November	December	January	February	March	April	May	June
Donor A	Call: Welcome back to school, share what's new at SDJA	Invite to Meet with HoS + Key Leadership and/or invite major donor to small gathering at your home	Deliver: High Holiday Baskets with a personalized note	Call: Thank you for your gift, share the impact	Invite donor to come on campus to see a program	Email: Happy New Year	Invite: SDJA Fundraiser	Call: Check-in, Shabbat Shalom	Deliver: Passover/ Shabbat Basket	Invite to SDJA Graduation	Note: Thank you for your gift. Share impact story.
Donor B	Call: Welcome back to school, share what's new at SDJA	Invite to Meet with HoS + Leadership and/or invite major donor to small gathering at your home	Deliver: High Holiday Baskets with a personalized note	Call: Thank you for your gift, share the impact	Invite donor to come on campus to see a program	Email: Happy New Year	Invite: SDJA Fundraiser	Call: Check-in, Shabbat Shalom	Deliver: Passover/ Shabbat Basket	Invite to SDJA Graduation	Note: Thank you for your gift. Share impact story.



# Other Key Leadership Beyond the Board

- Parent Focus Group (Moked)
- PTO
- Senior Leadership Team
- All Faculty
- Alumni