Your Most Important Message

Using the Portrait of the Graduate to Make Your Case for Admission & Development

Facilitated by:
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ISM Consultants
Advancing school leadership—enriching the student experience.

ISM is dedicated to the advancement of school management. We provide creative strategies by combining extensive research, proven management techniques, and personalized service.
Who is in the Room?
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❖ 25 years in development; joined ISM in 2002
❖ Heads ISM fundraising services in the areas of annual, capital, endowment, and major gift fundraising
❖ Has advised and/or worked on-site with more than 120 schools in the U.S. and abroad
❖ Conducts development assessments and planning, campaign studies and coaching, case statements, prospect research
❖ Conducts leadership and Board retreats
❖ Coaches school professional and volunteer leaders
❖ Keynotes and speaks at education conferences—AISNE, CASE-NAIS, FCIS, NCAIS, SAIS, TABS
❖ Convenes ISM’s Advancement Academy for experienced practitioners in enrollment management, development, and marketing communications
Penny Rogers, IAP-L
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❖ 13 years in private-independent school advancement
❖ Joined ISM in 2010
❖ Consult in marketing communications and enrollment management planning, Case Statements, Message Frameworks, and development assessments
❖ Speak at state and national education conferences—AISAP, EMA, CASE-NAIS, FCIS, NCAIS
❖ Summer Institute workshop leader
❖ Founding faculty member and Co-Convener of ISM’s Advancement Academy for experienced practitioners in enrollment management, development, and marketing communications
Workshop Objectives

❖ Understand the components and value of Purpose & Outcome statements, which include the Portrait of the Graduate.

❖ Learn how to lead your school in creating and utilizing the Portrait of the Graduate.

❖ Explore ways to utilize the Portrait of the Graduate for building your Case for Enrollment and Giving.
Independent Schools are Unique

You aren’t “selling” your school.

You are inviting students into a very particular learning experience, and inviting parents into a very particular peer community.
Independent Schools are Unique

To inspire people to act on the invitation to enroll and invest, schools describe how students are positively impacted by their learning experiences in a suite of Purpose and Outcome Statements.
ISM’s Advancement Model

Enrollment Management
Recruitment and Re-recruitment

Development
Major, Capital, and Annual Gifts

Marketing Communications

Professional and Volunteer Leadership

Case for Enrollment and Giving

Constituents

Plan of Action

Strategic Board
Strategic Plan/Strategic Financial Plan
What are Purpose and Outcome Statements?

{Your Mission, Your Students, Your Faculty}

- Mission Statement
- Portrait of the Graduate
- Characteristics of Professional Excellence

Strategic Plan/Strategic Financial Plan
Can You Write Your Mission?

No peeking!
Your Mission Statement Should …

❖ answer the question: why does your school exist?

❖ distinguish your school from all others in your market.

❖ be short enough in length that faculty and students can memorize it.

❖ underwrite all decision-making.
Exemplar Mission

“The Piedmont School strives daily to be the educational oasis that quenches the thirst of students who learn differently.”

The Piedmont School, High Point, North Carolina
Music Nonprofit

“We exist because we cannot imagine a world without music.”
Your Portrait of the Graduate Should …

❖ describe the student who graduates from your school, having been transformed by his/her experiences with you.

❖ differentiate your school from your competitors.

❖ provide short descriptors of your “product”.

Portrait of the Graduate
Characteristics of Professional Excellence Should …

❖ describe the behaviors, values, and attitudes that must be present within your faculty for your promise to be fulfilled.

❖ be growth-focused and aspirational.

❖ Include no more than 7-10 statements.
Portrait of the Graduate Examples
Ursuline Academy

Wilmington, DE

We are citizens.
We are pioneers.
We are disciples.
We are thinkers.

www.ursuline.org
WE ARE THINKERS.

We relish the pursuit of finding those moments in life that ignite our curiosity.

Early Childhood at Ursuline Academy
WE ARE PIONEERS.
WE ARE THINKERS.
WE ARE CITIZENS.
WE ARE DISCIPLES.

At Ursuline Academy, students are driven by more than just a thirst for knowledge. They thrive on the power of curiosity and the satisfaction of finding their own voices. They're dedicated to the practice of faith and service. They're committed to discovering their identities, cultivating their strengths, and taking their rightful place as leaders of our world.

ursuline.org
Early Childhood to 5th Grade—Co-ed
6th–12th Grade—All Girls
Trinity Episcopal
New Orleans

A reflective person
An empathetic upstander
An ardent questioner
A fluent communicator
A collaborative learner

www.trinitynola.org
Heritage Christian Schools
New Berlin, WI

❖ Relational
❖ Honorable
❖ Godly
❖ Prepared

Our mission is to train and inspire servant leaders through exceptional Christ-centered education and programs.

www.heritagechristianschools.org
Calhoun School

Calhoun inspires a passion for learning through a progressive approach to education that values intellectual pursuit, creativity, diversity and community involvement.

Calhoun Students are Thinkers, Innovators, Leaders

www.calhoun.org
One Calhoun

Every day, Calhoun makes a commitment to set the future in motion. Spark by spark, curiosity takes hold in our students and becomes the engine that drives better learning, inspiring them to search, to inquire, to experience, to innovate, and to begin that process all over again with each new idea.

Throughout the 15-year experience at Calhoun, at every age from the Young 3’s through 12th grade, learning also means that students nurture relationships with teachers and begin to understand the impact of guided human connection; values are identified, formed and shared — not only as intellectual pursuits but as communal convictions that promote equity, diversity and social justice; and the classroom is experiential: senses are stimulated, pathways are individualized, cities are explored, journeys are underway.

Supporting Calhoun makes so much more possible for our students, faculty and staff. With each gift, Calhoun is better able to support our students’ education and fulfill our mission to inspire a passion for learning that values intellectual pursuit, creativity, diversity and community involvement.

Your generosity enables our faculty, administrators and coaches to inspire creative, independent thinkers with a conscious responsibility for the good of all.

Leadership
Steven L. Solnick
Head of School, ’19
Jon Brayshaw
Chair, Board of Trustees, ’18, ’20, ’23, ’26
Karen Greene
Development Chair, Board of Trustees, ’25
Aaron Dunn
Trustee and Chair, The Calhoun Annual Fund, ’31

Questions? Contact the Office of Development and Alumni Relations:
L.J. Mitchell, Director of Development, at 212-497-6588

calhoun.org/onlinegiving
#OneCalhoun
Leading a Portrait of the Graduate Workshop at YOUR School
Step 1: Prepare Your Team for the Work

❖ The School Head must endorse this work

❖ Educate your faculty, staff, and administrators about what P&O Statements are and why they matter

❖ Invite them to participate—share the date, time, and workshop agenda

❖ Preconfigure your breakout groups with representatives from each constituent group

❖ Identify a Purpose & Outcome Statement steering committee to finesse the draft statements for final review/affirmation
Who Participates?

- Full faculty
- Support staff
- Academic leadership team
- Advancement team
- Operational leadership team
- In high school settings: rising seniors, seniors, and/or young alumni
Step 2: In Breakout Groups …

❖ Choose a discussion facilitator
❖ Choose a time keeper—you have 45 minutes
❖ Choose a group recorder to capture your statements
❖ Choose a group spokesperson to report back your group’s final statements to the larger group
❖ Describe the students who graduate from your school, having been transformed by their experiences with you
❖ Distill your statements down to the 3 to 5 of the most meaningful, succinct, and authentic representations of your school’s graduate
❖ Report back to the larger group
Activating Questions
{to elicit student descriptors}

- What is unique about students at your school?
- What are the student behaviors and characteristics that you think are most linked to success later in life?
- What aptitudes and attitudes do your students have that make them unique among other students their age?
- How are students changed by their experiences at your school?
Step 3: Distill the Group Statements

- Compile (and save) all statements collected from every group into a shared electronic file.

- Prior to the first finessing team meeting, ask individuals to cluster “like” statements.

- From those clusters, ask each person to identify key themes.

- As a team, agree upon a selection of themes/concepts that are most indicative of your students.
Step 4: Further Refine

- Prior to the second finessing team meeting, individuals should revisit the original data set and select the best words and phrases to describe each theme/concept/goal.

- At the second finessing team meeting, consider the draft statements created by each member.

- Which statements best capture the essence of what you intend?

- Are there words or phrases that you can pull from multiple statement iterations to make each statement better?
Step 5: Finalize

- When you have settled on a final draft, return the Portrait of the Graduate to the same group who participated in the initial large-group workshop.

- Ask them to affirm the statements.

- If they are not ready to affirm, schedule a third finessing team meeting to explore their feedback.

- Return to faculty for affirmation.

- Publish your statements on your website and in your print materials.

- Use them to inform your Cases for Enrollment and Giving.
Where Do I Begin?
Existing Mission

Founded in 1764, Columbia Grammar & Preparatory School balances a rigorous comprehensive college preparatory curriculum with healthy social and emotional development. We dedicate ourselves to educating students with diverse talents and backgrounds and offer them opportunities to learn, reflect and safely express their ideas and creativity. With our parent body, we share a fundamental commitment to high academic achievement and the development of social responsibility.
Words that Matter

Founded in 1764, Columbia Grammar & Preparatory School balances a rigorous comprehensive college preparatory curriculum with healthy social and emotional development. We dedicate ourselves to educating students with diverse talents and backgrounds and offer them opportunities to learn, reflect and safely express their ideas and creativity. With our parent body, we share a fundamental commitment to high academic achievement and the development of social responsibility.
Columbia Grammar & Preparatory Students ...

**Embrace challenge.**
Our students take intellectual risks, develop resilience, and advocate for themselves.

**Explore possibilities.**
Our students pursue excellence in academics, arts, and athletics while discovering new talents and passions.

**Demonstrate character.**
Our students are community-minded citizens who care about the impact their choices have on others.

**Value differences.**
Our students celebrate one another’s unique stories and actively engage in the practices of social justice.

**Seek balance.**
Our students learn that academic success comes in harmony with personal well-being.
Save the Date

10th Annual Advancement Academy

July 22–26, 2019
THE CURTIS HOTEL • DENVER, CO
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