Assess the Success of Your Development Operations

Paula Schwartz, EdD
Director, ISM Fundraising Group and Senior Consultant
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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Senior Consultant
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About Paula

◆ 30 years in development; joined ISM in 2002
◆ Heads ISM advancement 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 feasibility studies, development assessments, campaign 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 expert practitioners in admission and enrollment management, development, and marketing communications
Course Objectives

Examine how you identify, engage, evaluate, solicit, recognize, and steward your donors and prospects to foster and sustain a philanthropic culture

Determine how well you know and attend to your donors

Examine specific office management practices critical to high-performing operations

Set your priorities to create a plan of action going forward
The success of your development depends on data informed objectives, ability to measure your progress, and perform as unified team.

1. **Two Teaching Frameworks**
   - ISM Advancement Model
   - ISM Development Model

2. **Self Assess**
   - ISM Development Model
   - Development Operations Assessment
   - Consistent Donor Engagement
   - Development Office Management

3. **Your Action Plan**
ISM ADVANCEMENT MODEL

Enrollment Management
- Recruitment and Re-recruitment

Development
- Major, Capital, and Annual Gifts

Marketing Communications

Strategic Board
- Strategic Plan/Strategic Financial Plan

Professional and Volunteer Leadership

Case for Enrollment and Giving

Constituents

Plan of Action
ISM DEVELOPMENT MODEL

Estate or Planned Giving
- Bequests
- Planned Gifts

Major Giving
- Endowment Campaigns
- Capital and Special Campaigns
- Major Gifts from Donors and Prospects

Annual Giving
- Volunteer-Led Annual Giving Campaigns
- Activities, Benefits, and Special Events

Donor-Centered Programs

Donor-Centered Programs

Leadership  Case for Support  Prospects  Plan of Action

Strategic Board
Development Assessment Tool
ISM 2 Development Stability Markers

1. **Consistent Donor Engagement**—How do we identify, engage, evaluate, solicit, recognize, and steward donors and prospects. [External efforts to engage our constituents in every phase of the donor cycle]

2. **Development Office Management** — How we collect, track, record, organize, and report on all aspects of the development effort [internal procedures to support the donor cycle]
Consistent Donor Engagement

To what extent does your school fully and appropriately attend to your donors and prospects through the six stages of the donor cycle:

1. Identify
2. Engage
3. Evaluate
4. Solicit
5. Recognize
6. Steward
Donor Cycle

Values & Mission

- Identification
- Engagement
- Evaluation
- Solicitation
- Stewardship
- Recognition
The amount and kind of attention paid to these individuals, families, and organizations **when not actually soliciting from them** can make enormous differences in any school’s “soft-income” success, both short- and long-term, and for annual, capital, and major donor efforts.
<table>
<thead>
<tr>
<th>Total for Consistent Donor Engagement (0-60)</th>
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<tbody>
<tr>
<td>50-60</td>
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<tr>
<td>40-49</td>
</tr>
<tr>
<td>25-39</td>
</tr>
<tr>
<td>24 or less</td>
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</tbody>
</table>
Your Development Office’s capacity to

1) Provide support for all phases of the donor cycle
2) Strategically plan and budget development operations
3) Collect, track, record, and organize data
4) Conduct analysis and provide reports as needed
5) Maintain a professional and well-trained staff

Your ability to raise soft income rests on the excellence with which these activities are undertaken and executed.
<table>
<thead>
<tr>
<th>Total Development Office Management (0-40)</th>
<th></th>
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<tbody>
<tr>
<td>35-40</td>
<td>Great</td>
</tr>
<tr>
<td>25-34</td>
<td>Good</td>
</tr>
<tr>
<td>15-24</td>
<td>Getting started</td>
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<tr>
<td>14 or less</td>
<td>Poor</td>
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</table>
### Total for Both Development Stability Markers (0-100)

<table>
<thead>
<tr>
<th>Range</th>
<th>Description</th>
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<tbody>
<tr>
<td>90-100</td>
<td>Great</td>
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<tr>
<td>75-89</td>
<td>Good</td>
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<tr>
<td>60-74</td>
<td>Fair</td>
</tr>
<tr>
<td>40-59</td>
<td>Getting started</td>
</tr>
<tr>
<td>39 or less</td>
<td>Poor</td>
</tr>
</tbody>
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Let’s Assess

1. Review overall score
2. Invite others to take assessment
3. Share results
4. Identify strengths and weaknesses
5. Identify priorities
6. Review “don’t know” responses
7. Identify those areas that are least optimal
8. Set priorities
To further inform your research

1. What is your prospect most passionate about?
2. What impact has the school had on your prospect and his/her family?
3. What are your prospect’s interests and values as they relate to your school?
4. What other charities does your prospect feel strongly about?
5. How does your school fit in your prospect’s overall philanthropic priorities?
6. What aspects of your school’s strategic priorities resonate with your prospect?
To further inform your research

7. Who are the right volunteers and/or professionals to engage/cultivate your prospect?
8. Who are the right solicitors?
9. When and where is the best location for a solicitation?
10. What is the right $ amount or $ range?
11. Would your prospect be interested in a named gift?
12. What motivates your prospect’s philanthropy
Assess, Score, Reflect and
Components of a Plan

1. Set goals
2. Determine costs
3. Identify revenue source
4. Identify who’s responsible
5. Set a timeline for completion
6. Determine metrics for success
Any Questions?
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