

# BEST PRACTICE AND THE SMALL SHOP

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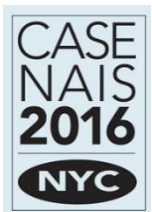
*Presented by:*

**Jay Angeletti**, President, The Angeletti Group

**John Fixx**, Head of School, The Country School

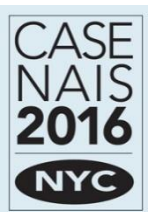
**David Beecher**, Director of Development, The Country School

*January 31, 2016*



# Today's Presentation

1. The True Advancement Model
2. The Small Shop Snapshot
3. Case Study Perspectives



# The Small Shop Snapshot

## A Day in the Life

Committee meetings

Parent giving

Events

Annual fund

Major gifts

Communications

Website

Recognition

Grants

Capital Campaign

Volunteers

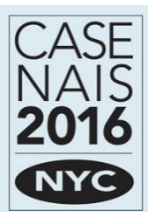
Board of Trustees

Stewardship

Database

Planned gifts

Endowment



# The True Advancement Model

## Benefits

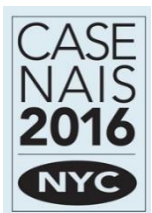
- Conserve resources.
- Unify messages.
- Share strategies.
- Build brand.
- Increase giving participation.



# The True Advancement Model

## Requirements for Success

- Identify shared goals.
- Form interdisciplinary teams to lead advancement efforts.
- Rotate monthly advancement meetings among the departments, allowing each to take turns leading the agenda.
- Leadership must emphasize each department's role in major accomplishments.
- It isn't just fundraisers who get credit for fundraising.



# The True Advancement Model

## Implementing the Model at YOUR Institution

### Action Steps

- Ask Head/President to adopt true advancement model.
- Develop true advancement goals, not siloed goals for each function.
- Convene collaborative council, including development, admissions, communications/marketing, placement, and faculty.
  - Interdisciplinary teams
  - Leadership that rotates
  - Meeting sites that rotate
- Launch initiative with advancement study, including personal interviews, focus groups, and electronic survey.



# The Small Shop Snapshot

## Elements for Success

- Organization and planning
- Prioritization
  - What can and can't wait?
- Efficiency
  - Hiring the right (small) staff
  - Coordination and teamwork
  - Streamlined communication
  - Online tools and technology
  - Volunteers
- Finding the time to get off campus



# The Importance of the Head

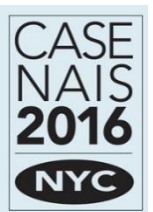
- Major donors want to meet with the Head.
- The Development Office needs to feed the Head with information about a family that has the potential to be a major donor.
  - Lunches, meetings at school, or dinners with a few couples are all opportunities for the Head to talk about the school but more importantly to listen to the donors talk about what is important to them about your school.
  - The Head should already be aware of the interests of the student so he/she can provide first hand experiences of having seen the student in action on stage, on the playing field, or in the classroom.
  - The more personal the comments, the better.
  - A strategic plan is very helpful in pointing out to potential donors the vision the school has for the future and the intentionality of the plan.





# CASE STUDY PERSPECTIVES

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# A Creative Approach



# A Creative Approach



# THANK YOU

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The Angeletti Group, LLC  
Harrison House  
17 Village Road  
Box 188  
New Vernon, NJ 07976  
973-540-1400  
[www.theangelettigroup.com](http://www.theangelettigroup.com)

