

Advancement: It's Everybody's Job



Presented by
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Hosted by
THE ANGELETTI GROUP, LLC



A Corporate Supporter of the National Association of Independent Schools



About Jay Angeletti



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A Development Executive with more than 25 years of experience, Jay launched The Angeletti Group LLC in 2006 – a consulting firm designed to partner with clients engaged in healthcare and academic medicine, independent and higher education, and community building initiatives. Before doing so, Jay served Choate Rosemary Hall, Yale University School of Medicine, the University of Pennsylvania Health System, Drew University and New York-Presbyterian Hospital.

Jay's extensive client list includes many of the nation's leading independent schools, universities, medical institutions and other non profits. He is a sought after speaker and writer, and he currently sits on the Advisory Board of Fairleigh Dickinson's non profit leadership program.



About Alan Gibby



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Alan comes to The Angeletti Group from an illustrious career in secondary independent school education, bringing with him the insight and experience of a leader many times over.

Most recently, Headmaster of Keith Country Day School in Rockford, Illinois, Gibby was also Headmaster at Burlington Day School in Burlington, North Carolina, and The Selwyn School in Denton, Texas, and held top administrative positions at Heathwood Hall Episcopal School in Columbia, South Carolina, and Lancaster Country Day School in Lancaster, Pennsylvania.



About Adele Dujardin



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Adele has worked in education for over twenty-five years in secondary, middle, and elementary schools. Before joining The Angeletti Group, Adele helped start The Willow School, a pre-kindergarten through eighth grade private school in Gladstone, New Jersey.

Adele served on the hiring committees that found and secured the Heads of School as well as the diverse and talented faculty that helped Willow become nationally known as an innovative educational institution. She also co-designed and co-wrote the curriculum that differentiates Willow and leads its students through inquiry-based learning. Under Adele's guidance, Willow began a community service learning program where Willow students partner with local non-profit organizations to meet the organizations' needs and extend student learning beyond the classroom.



About Kerri Small



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Kerri Small is the Director of College Guidance at Gill St. Bernard's School. She is the former Associate Dean and Director of College Admissions at Drew University in New Jersey.

Kerri is well-known by college admissions professionals for her work in the field and has presented at a number of conferences and workshops on various topics in college admissions.

About The Angeletti Group



The Angeletti Group, LLC offers philanthropic counsel to the most passionate in Education, Healthcare and Community Building. We offer clients a breadth of services including:

- Board Development and Coaching
- Development Assessments
- Campaign Implementation and Management
- Planning, Feasibility and Pulsing Studies
- Executive Search, Interim and Outsourced Staffing
- Prospect Research and Wealth Screening
- Information Database Enhancement
- Benchmarking Analytics
- Annual Fund/ Direct Response Solutions
- Metrics-drive Major Gift Programs
- Planned Giving Counsel
- Communications and Events Design and Production
- Cross Media Strategies

Everyone Has a Role



- Initial contact with **admissions** office.
- Once a student is admitted, the **faculty** becomes the daily contact with students.
- In high school, the **college counselor** becomes aware of a student's academic prowess, leadership skills, and accomplishments to guide them into a successful post secondary experience.
- Development works carefully and intentionally with the **Head of School** to develop a trusting relationship with potential donors.
- The **development office** needs the input from all of these campus partners and more to understand a family's potential as a prospective donor.
- The **communications office** serves as a central nervous system of contact with all constituencies.
- By the time an ask is made, the school can be confident of an affirmative response.

Key Perspectives



- From the Admissions Office
- From the Faculty
- From the College Counseling Office
- From the Communications Office
- From the Headmaster's Office
- From the Development Office

From the Admissions Office



- Start early and be intentional.
 - Development professionals and Headmaster presence during admissions process.
 - Match newly admitted families with volunteers who discuss the role of philanthropy at their schools.
- Creativity in telling your “story.”
 - Less talking about the "gap" between tuition and cost of attendance when making solicitations.
 - Positive campaigns focused on students and popular activities.
- Strategic review.
 - Revisit your process of engaging new families to ensure you’re not saying the same things about philanthropy over and over again without success.

Source: “Introducing New Families to Independent School Philanthropy,” BriefCASE, January 2013

After Admissions: Parents



- When to introduce parents to giving?
- What are they saying about the institution?
- Do parents hear from fundraisers outside of solicitations?
- Businesses → customers or clients;
Independent schools → parents
- Beyond admissions
 - Parents not only fill desks in the classrooms with their children but also participate in annual fund drives, capital campaigns, and special fundraising events.

From The Faculty



- Lasting impact.
- Goal: To create a regular dialogue and efficient systems between the development office and the faculty so that both can appreciate each other's roles and benefit from each other's perspectives and expertise.

Engaging Faculty



- Faculty representatives serve on the strategic planning committee.
- Faculty is invited to be part of fundraising planning.
- Faculty is included at fundraising functions and meetings.
- Group of retired faculty or those who have left the school (under good circumstances) honored with a lunch or special event every year.

Engaging Faculty



- The development office informs faculty about grant opportunities, teaches them about grant writing, and helps them during the submission process.
- The development office and school honor faculty who reach certain levels in fundraising.
- The development office and school honor faculty with endowed chairs.

From the College Counseling Office



- Counselors develop strong relationships, often ones of a personal nature, with students and their families as they work through the college application process together.
- Students and families tend to share more than their goals for college, and the conversations that ensue tend to include personal information (family finances and home dynamics).

Relationship with the Counselor



- Unlike teachers, coaches, and other instructional staff, the counselor is in a position to always remain unbiased and focused on student outcomes. It is their job to do so.
- Families often seek an ally in a college counselor.
- Students of the same family typically remain with the same college counselor. The reason is simple: a bond has been formed and it just makes sense to further a relationship than to initiate a new one.

Role of the Counselor in Fundraising



- Pay attention to students at every grade level to engage and reassure families.
- Help students make good choices about testing, coursework, college fits, expense of college etc.
- Commit to short and sometimes longer term relationships with families.
- Keep Head of School informed of all things involving the process that might enhance or reduce the likelihood of a family to give.

From the Communications Office



- 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 Headmaster and Fundraising



Fig. 14: The head spends an appropriate amount of time on fundraising activities.

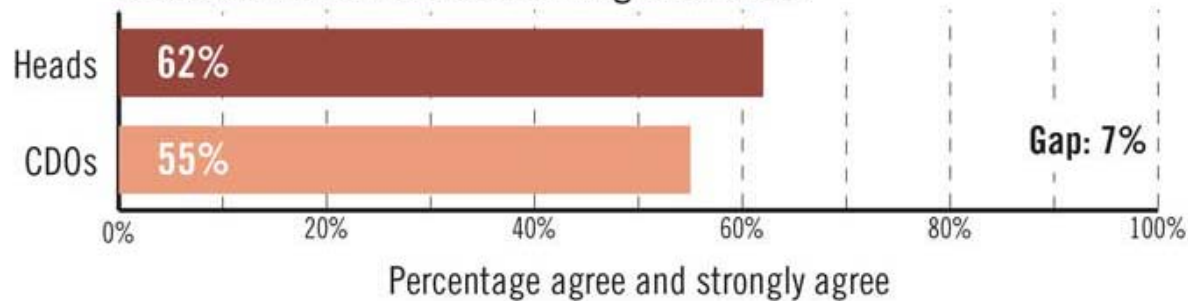
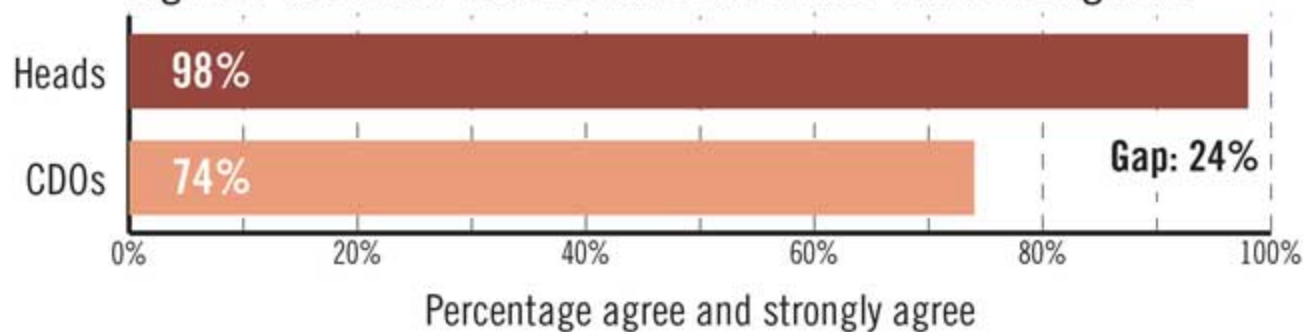


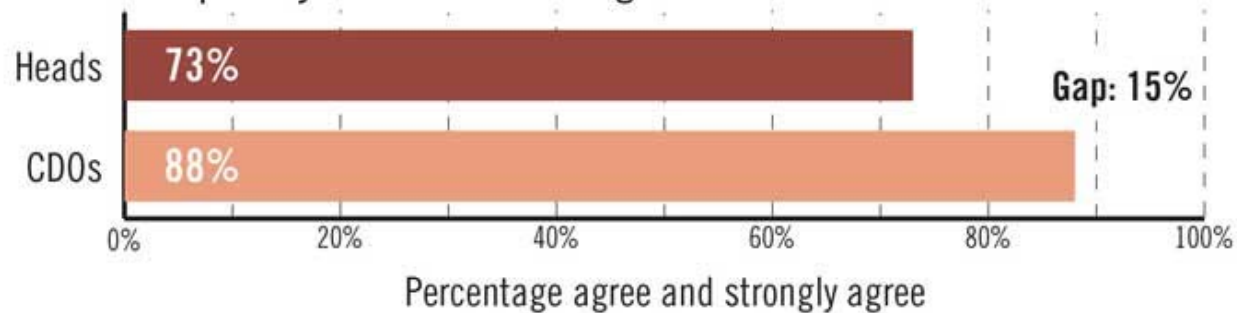
Fig. 11: The head understands his or her fundraising role.



The Headmaster and Fundraising



Fig. 17: The CDO prepares the head adequately for donor meetings.



- This means that more than **25%** of heads do not agree that they are being well-prepared.

From the Headmaster



- 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.

From the Development Office



- In addition to preparing the Head and all other departments to be part of the development process, the Development Office must also focus on alumni giving.
- Make sure that the needs of the school and the interests of the donor coincide as much as possible.
- The Head plays a critical role in developing the relationship with the donor and helping to craft the ask.

Benefits of a Collaborative Model



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

Implementing a Collaborative Model



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.

Thank you.



QUESTIONS?

Slides will be available at www.TheAngelettiGroup.com.