

Mobilizing Your Board to Inspire and Motivate Others: A Trustee's Perspective

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Fundraising • Development Services • Strategic Consulting

Agenda

- 1 Welcome and Introductions
- 2 Campaign Building Blocks
 - Board Education
 - Culture of Philanthropy
 - Advancement Office Execution
- 3 Campaign Momentum
 - Board Engagement
 - Community Support
 - Sustainable Giving
- 4 Questions and Discussion

**INTRODUCTION:
CCS & THE LAB SCHOOL OF WASHINGTON**

About The Lab School of Washington

- An independent day school founded in 1967 for college-bound students grades 1 -12 with learning differences
- Arts based, experiential program with low student/teacher ratio
- Enrollment: 355 students from DC, Maryland, and Virginia
- Budget: \$20 million with an endowment of \$4.5 million
- Governed by 24-member Board of Directors
- 8-acre urban campus with the age of facilities ranging from the late 1800s to 2000 with deferred maintenance estimated at \$5-\$8 million

The Lab School of Washington



Capital Campaign: **“TRANSFORMING LIVES. TRANSFORMING EDUCATION.”**

The Lab School: Capital Campaign

Campaign Goal: \$10 million

Case Components

Build a new HIGH SCHOOL to enhance our experience for older students while maintaining our dynamic college preparatory environment.

Renovate the MIDDLE SCHOOL AND THEATER to create modern, innovative teaching and learning spaces with even more opportunity for artistic expression.

Acquire and enhance an ATHLETIC FIELD to provide competitive sports opportunities for students of all ages.

Build our ENDOWMENT to boost much-needed financial aid for current and prospective students.

Add a new ART WING to provide cutting-edge studio spaces where creativity will flourish.



Planning Timeline: The Lab School



Phase	Timing	Key Advancements
I	July 2008 – June 2010	Strategic Planning Process
II	January 2011 – January 2013	Master Facilities Plan
III	September – December 2012	Feasibility and Planning Study with CCS
IV	January – February 2013	Decision to hire CCS for Campaign
V	March 2013 – June 2014	Cornerstone and Leadership Gifts Phases
VI	June 2013 – October 2014	Major Gifts Phase and Constituency Development
VII	October 2014-June 2015	Public Launch and Constituency Phases
VIII	October – July 2016	Community Outreach and Donor Recognition

CAMPAIGN BUILDING BLOCKS

Audience Poll

Are you currently:

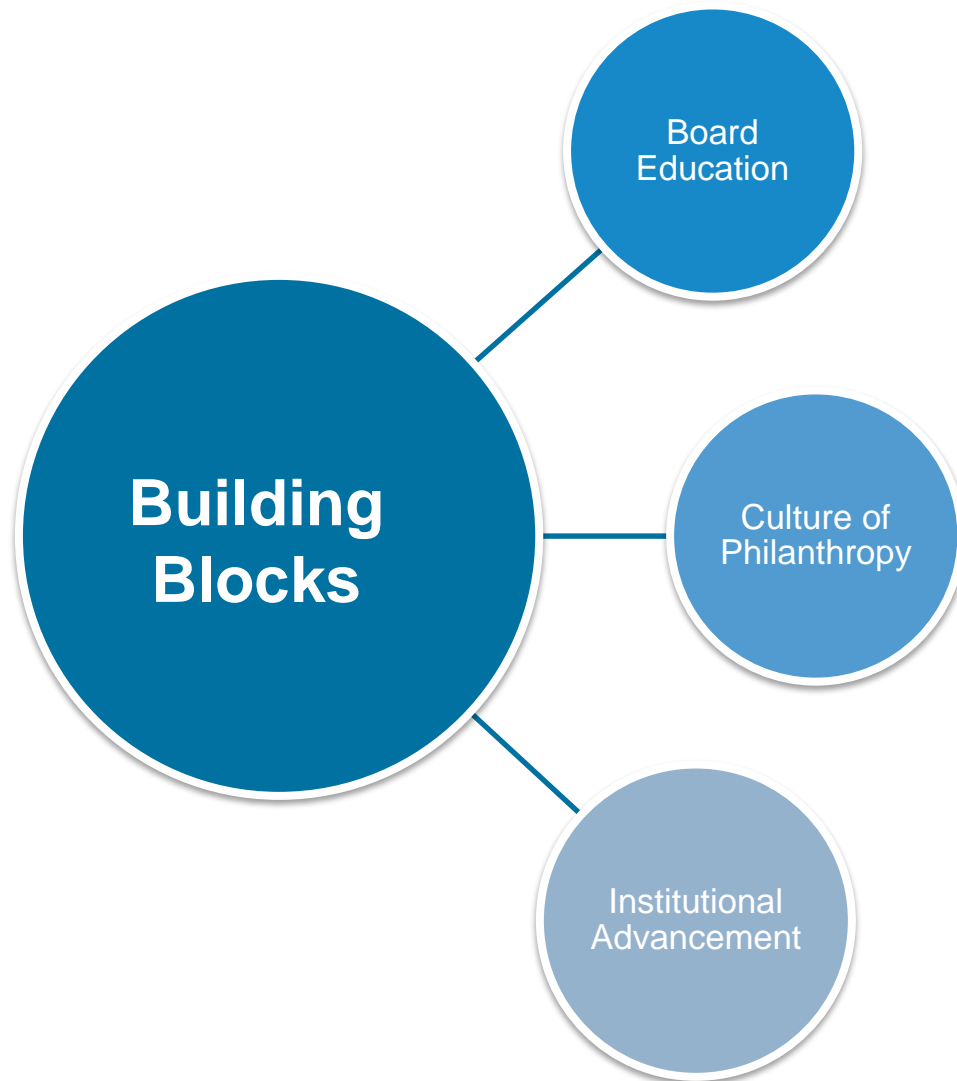
- Conducting a campaign?
- Planning a campaign?
- Just finishing up a campaign?



Campaign Elements – Keys to Success



Key Building Blocks



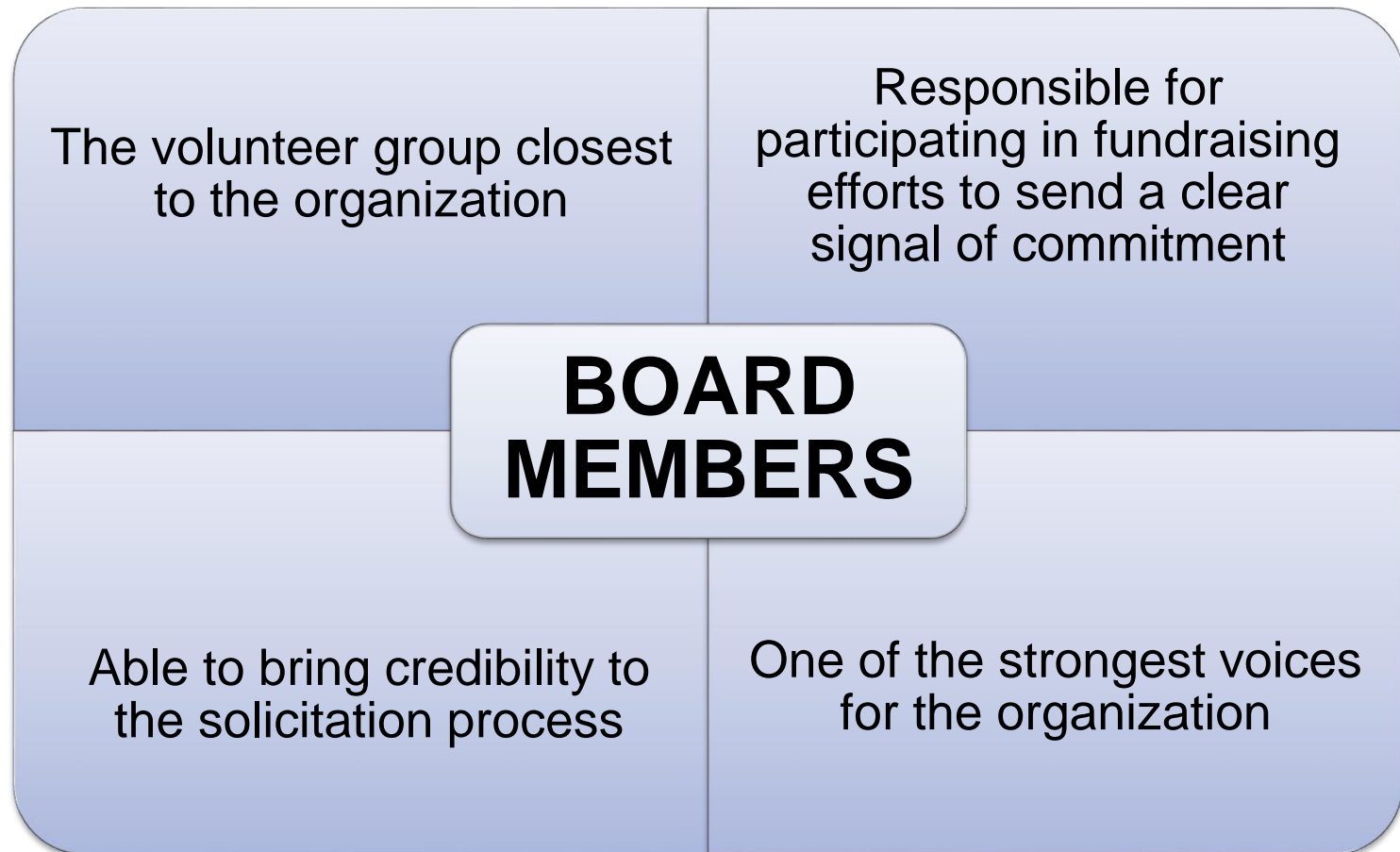
BOARD EDUCATION

Board Member Giving

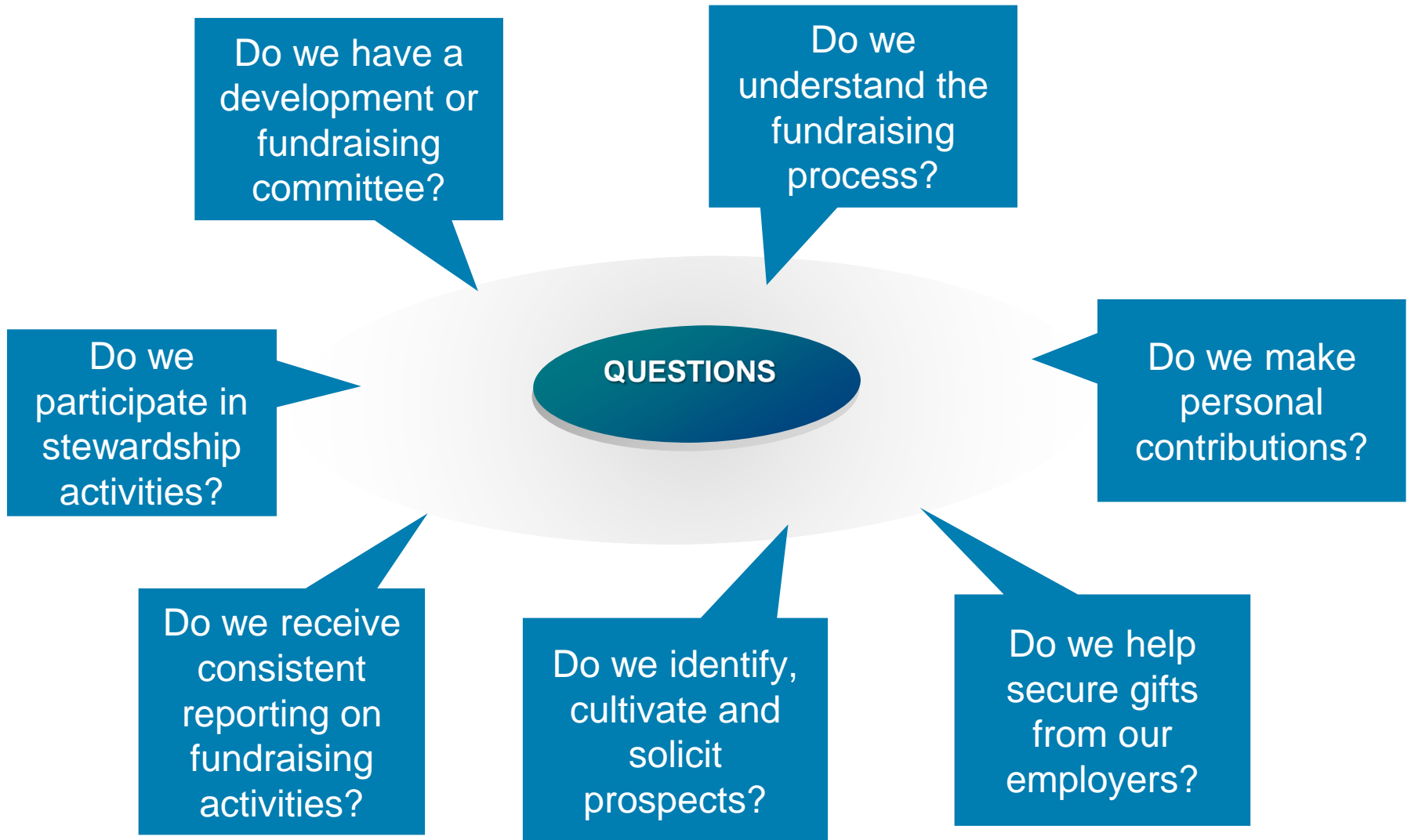
- Industry Standards
 - Nearly 75% of non-profits report a 90-100% giving rate by board members
 - 64% of non-profits require contributions from board members
 - 81% of board members say they would give a gift to a capital campaign, and 71% said they would make connections
 - **100% board giving should be an expectation**
- The give-and-get commitment



Board Members: Critical Fundraising Partners



Board Evaluation – Fundraising Questions



Audience Poll

During your last or current campaign, did you see Board participation?

- No
- Yes, 0-50%
- Yes, 51-100%



Headliners

- “Board Needs Education on Capital Campaign, Again”
- “Turning Gratitude and Passion Into Giving”
- “Customizing Each and Every Ask for Success”
- “Patience Required”
- “More Help Please”

Board Education: Lab School Successes

Both Campaign Co-Chairs are members of the Board of Trustees

Surpassed giving goal of \$2 million (20% of overall campaign goal)

First group to reach 100% participation

Highest average gift among all constituent groups so far

CASE STUDY CHALLENGE: Educating the Board

Background: After completing the Strategic Plan, the Board spent almost two years debating and prioritizing the Strategic Plan goals – getting this agreement was a critical building block for the Capital Campaign

Challenge: *How to convince the Board that a campaign was critical to the future growth and sustainability of the school?*

Solution: Two Important Concepts Helped Sway the Board

- The school was at a critical juncture in its facility's lifecycle -- deferred maintenance and modernization costs were eclipsing the ability of the operating budget to keep up with needed repairs and improvements
- The Head of School was passionate about the need for a New High School and renovated Middle School

The Lab School: Beginning Board Culture

Recruited without any fundraising commitment

Very involved in school administration

Not accustomed to asking others for money

No capital campaign experience

Unsure and hesitant about potential campaign success

Culture of gratitude but not always of giving

The Message to The Lab School Board



CULTURE OF PHILANTHROPY

A Culture of Philanthropy Defined

*“Everyone in the organization...understands that philanthropy and fund development are critical to organizational health and that each individual has a role in the process. First and foremost, everyone is an **ambassador**.”*

– Simone P. Joyaux, ACFRE

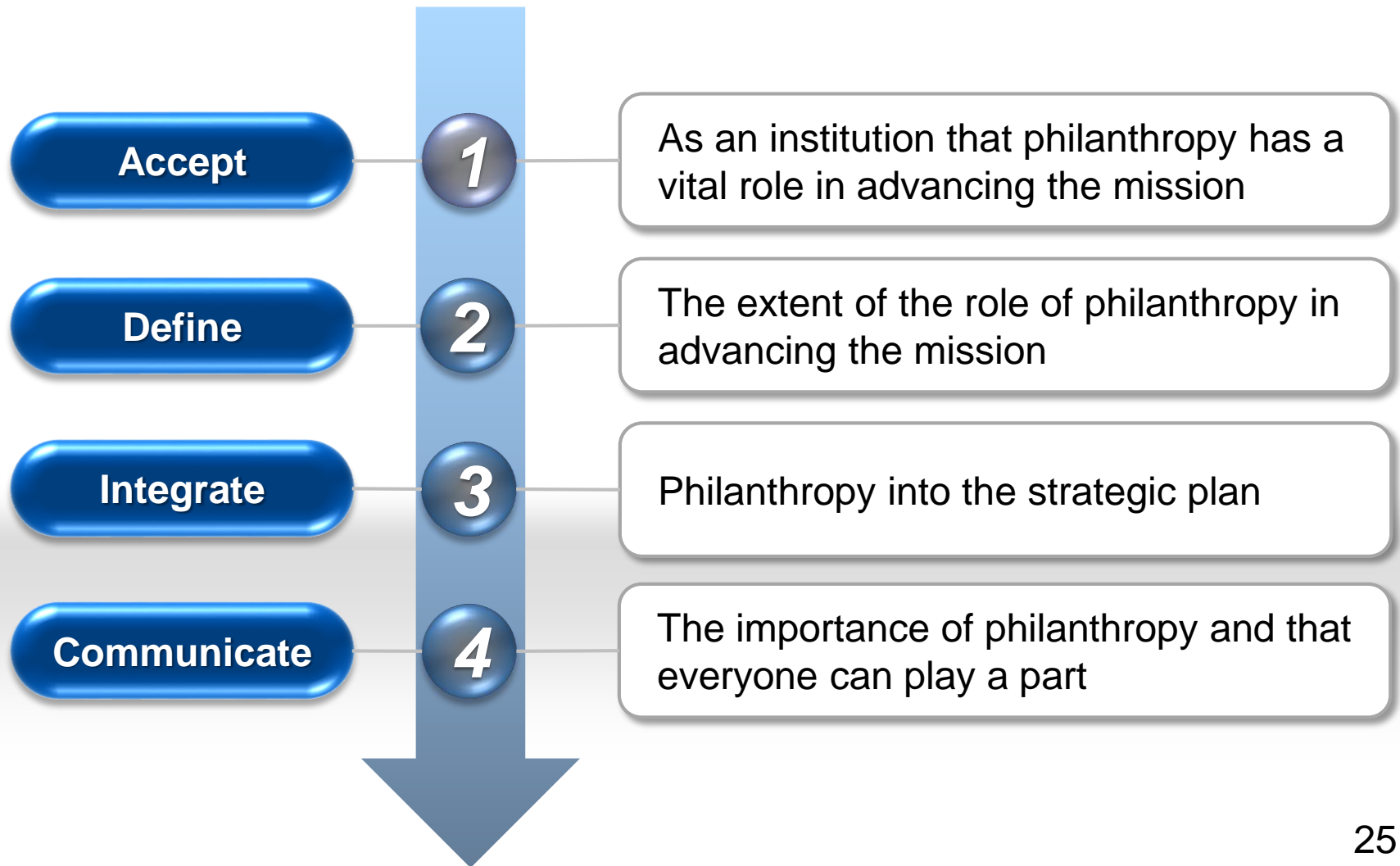
Characteristics of a Philanthropic Culture



- Everyone has contact with donors
- There is true collaboration
- Development costs are seen as investment
- Donors are valued, not for money alone, but for their input
- Donors receive informational reports in addition to recognition
- Personalized communication has replaced boilerplates
- More time allocated to keeping donors than to acquiring new ones

Developing a Culture of Philanthropy

Start at the Top: Management & Board



Building A Philanthropic Culture: Lab School Successes

- Tailored proposals and meetings for each Board member
- Two Board members agreed to chair the campaign
- The Board was the first group to be solicited and reach 100%

	Annual Giving 2012-2013	Capital Campaign
# of Board Members	20 members	
Participation Rate	100%	100%
Total Giving	\$193,998	\$2,012,329
Average Gift	\$8,435	\$95,825

CASE STUDY CHALLENGE: Developing a Strong Culture of Philanthropy

Background: At the outset, only one Board Member understood the need for a capital campaign, and only two Board Members understood that launching a campaign would require meaningful personal financial contributions from each Board Member

Challenge: *How do we get the Board to support the campaign financially?*

Solution:

- The Feasibility Study played a much bigger and more important role at Lab School – conversations needed to begin with the broad idea of philanthropy rather than a more specific conversation about the donor’s philanthropy as it relates to the Lab School
- We communicated to the Board that each and every one on the Board would be personally asked for a gift and expected to give one

ADVANCEMENT OFFICE EXECUTION

The Role of Institutional Advancement

- Champions leadership's vision and case elements
- Collaborates with the head of school, academic leaders, foundation board and key volunteers to build a culture of philanthropy
- Tasks and empowers the president, academic leaders, foundation board and key volunteers and educates them on best practices in fundraising
- Understands and maintains a relationship with the community
- Maintains a portfolio of leadership and major gift prospects
- Coordinates prospect research, identification and management
- Instills Board confidence by creating an environment of stewardship and recognition, ensuring standard and ethical fundraising practices
- Acquires significant resources to manage all campaign activities
- Upholds a willingness to ask regularly (and strategically)
- Manages day-to-day fundraising operations and campaign activity

Institutional Advancement: Lab School Successes

- A comprehensive donor research and management system is in place
- Staff trained on individual, personal solicitation approaches
- Head of School well-supported for leadership asks

CASE STUDY CHALLENGE: Training and Developing Advancement Staff to Support the Board and Carry Annual and Capital Giving Forward

Background: The Development/Advancement Office was still building its Annual Giving program and did not have a well-developed research database nor did it have a well-developed donor solicitation and stewardship program

Challenge: *How do we leverage limited staff resources to keep Annual Giving on par and move the staff towards a more strategic, donor-focused approach to fundraising?*

Solution:

- Provide resources
- Train and support the Advancement Staff

Provide Resources

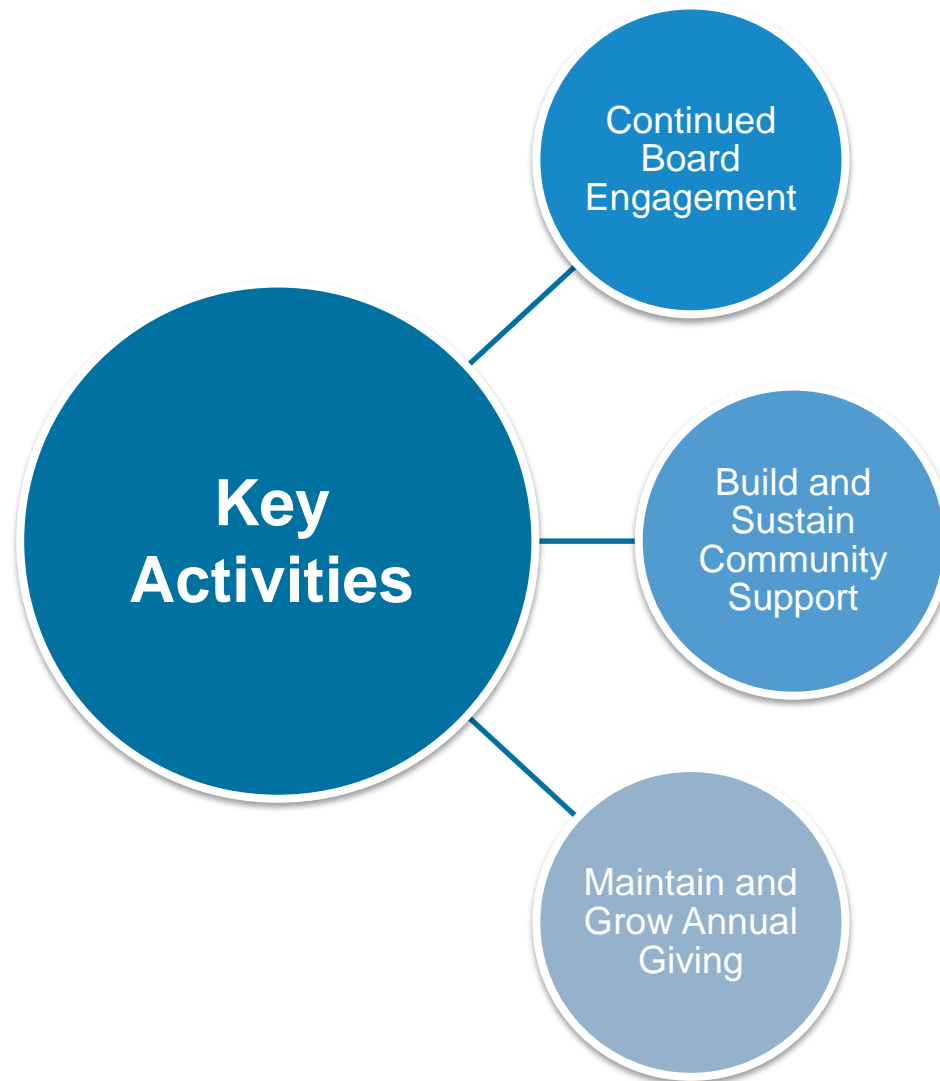
- Department Fundraising Priorities and/or a Case Statement
- Donor Research and Solicitation Strategies
- Brochure, proposal, FAQs
- Gift chart or table
- Background Information
- Conduct training – provide scripts or talking points
- How to handle objections or difficult questions
- News, website, videos, etc.

Train and Support the Advancement Staff

- Trained the staff: solicitation approach moved from pledge forms and letters to tailored proposals and face-to-face meetings
- Supported the back office: CCS provided critical donor research, volunteer management and stewardship support
- Enabled the staff to support Board Member outreach to donors: created a systematic donor research and contact database and process

CAMPAIGN MOMENTUM

The Key to Continued Momentum



BOARD ENGAGEMENT

Continued Board Engagement

- In two to five years, Boards should begin to see the following:
 - Blue sky boards
 - Board ownership (not management)
 - New board members
 - Regular board coaching

QUESTIONS FOR THOUGHT:

- What are the challenges to continued Board engagement?
- How is board support critical to the overall success of a campaign?

Board Engagement: Lab School Success

Board Members take on new leadership roles in the Campaign



Campaign Building Committee Members (5)



Parent Capital Campaign Committee Members (3)



Capital Campaign Chairs (2)



Gala Awardee Campaign Chair (1)



Additional Executive Committee Member (1)

CASE STUDY CHALLENGE: Getting the Board More Engaged

Background: Three Board members (two Campaign Co-chairs and the Board Development Chair) were actively involved with the campaign

Challenge: *How do we engage the remaining 21 Board members?*

Solution:

- We asked! The Development Chair, Board Chair and Head of School personally asked Board members to take on these roles
- We leveraged individual Board member interests when we asked them to join campaign committees – meshing volunteer and professional roles
 - Former Board Finance Chair
 - Two Real Estate Developers
 - The CEO of a Contracting/Engineering company
- We linked the success of the campaign to the ability to attract Municipal Bond Financing and to the ability to embark upon capital improvements and construction

Training and Coaching

Determine each member's initial comfort level with cultivation and solicitation activities

Cultivation Activities	Making Introductions	Briefings/Individual Cultivation	Solicitations	Follow-up
Attending Events	Personal Introductions to Institution/ Leadership/ Development Office	Helping to schedule or set-up a meeting	Being a part of a solicitation meeting	Sending a follow-up thank you note
Hosting Events	Providing Development Office with contact information	Being a part of a meeting, tour or lunch/dinner	Representing committed leaders and community members	Making a follow-up thank you phone call
Making Thank-You Calls to Donors	Providing acquaintance with Development Office information	Attend a briefing to help determine request amount and/or timing and project	Being the solicitor in a meeting	Helping to close a gift

COMMUNITY SUPPORT

Community Communication and Involvement

Best practices for community involvement once the campaign is launched include: 100% internal “buy-in”

- Infrastructure to sustain public communications and buzz
- Overall universal message with tailored stories
- Community ambassadors
- Multiplier effect
- Shared success

QUESTIONS FOR THOUGHT:

- How does the organization capitalize on moving from the silent to public phase?
- What key messages are important?

Community Involvement: Lab School Successes

- Campaign Communication Plan established
- Regular mailings to donors and potential donors
- Website portal created for internal and external community
- Widely attended launch events

CASE STUDY CHALLENGE: How to Engage the Lab School Community as We Moved Into the Public Phases of the Campaign

Background: We had a long silent phase and there was a significant time lag between the feasibility study which educated a number of parent donors about the campaign and the public launch

Challenge: *How do we reengage those donors and communicate the campaign to the community at large?*

Solution:

- We communicated with our constituents.
- We recruited Committee volunteers.

We Communicated with our Constituents

- During the silent phase we continued to send out mailings and updates to committed donors
- Prior to the Public Launch Event
 - We held an elegant cocktail party for committed donors to share architectural plans and campaign progress
 - We invited every parent that had volunteered for any school event to another event to share campaign plans
 - We held a special town meeting with all parents prior to the Launch – the event offered table talk opportunities to meet the architects, board members and the construction firm
 - We began including materials and story boards at every event – class parent parties, spring fair etc.

Committee Volunteer Recruitment

We recruited Committee Volunteers for and from many different constituencies

- Recruit leaders first -- Quality over quantity
- Set realistic expectations
- Provide a specific job description with roles and responsibilities
- Personal invitations
- Look to donors who have already made a commitment
- Affinity + Capacity = great candidates

Recruitment Principles:

- *Be clear about expectations!*
- Provide written roles and responsibilities
- Review job in person if possible
- Inform volunteers of estimated time requirements
- Frequency of communication
- Financial expectations

SUSTAINABLE GIVING

Audience Poll

During your last or current campaign, did you:

- Include the Annual Fund?
- Suspend the Annual Fund?
- Separate the Annual Fund from the campaign?



Sustaining Annual Giving

It is important to fundraising efforts that annual giving be maintained. A few ways to integrate that effort into the capital campaign include:

- Grow (not cannibalize) annual giving
- Incorporate in bundled requests
- Manage independently or include comprehensively
- Acquire new donors
- Build on success and new culture of giving

Independent Schools Sources of Support: Annual Giving

Annual Giving	2002		2011	
	Percentage of Funds Contributed	Percent Participation	Percentage of Funds Contributed	Percent Participation
Alumni	21.5%	19%	17.3%	15%
Parents	31.9%	61%	37.8%	64%
Organizations	13.7%	56%	10.9%	88%
Trustees	14.5%	92%	17.0%	95%
Other	18.4%	n/a	17.0%	n/a
Total	100%		100%	

Source: National Association of Independent Schools (NAIS), StatsOnline Survey 2002-2011

Lab School by the Numbers: Fundraising

ANNUAL GIVING

2013-2014

ANNUAL GIVING :	
Annual Fund	\$556,463
Gala	\$868,131
Temp. Restricted	\$139,311
TOTAL	\$1,563,905

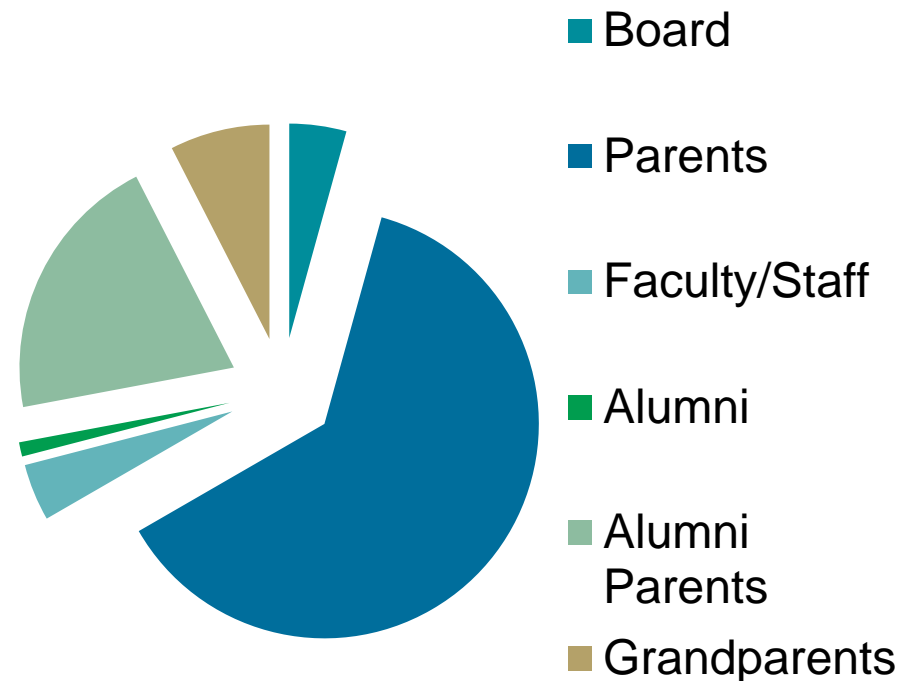


Lab School Sources of Annual Fund Giving

- Current and Alumni Parent Gifts comprise approximately 80% of the Annual Fund
- Faculty/Staff solicitations began in 2012 until that time they were not actively solicited for gifts
- Alumni Giving is small but growing

Portion of Total Annual Fund Raised

2013-2014



Sustaining Annual Giving: Lab School Successes

- Lab School Exceeded its Annual Fundraising Goal in 2013/2014 – a year that included active Capital Campaign leadership gift solicitation
- Lab School is on track to meet or exceed its Annual Fundraising Goal this year – a year that includes the public launch and very active Capital Campaign gift solicitation of all constituencies

CASE STUDY CHALLENGE: Sustaining Annual Giving During the Campaign Roll-Out

Background: In any given year, Annual Giving comprises 8-10% of the school's operating budget

Challenge: *How do we ensure that campaign donors continue to support the school's annual giving program?*

Solution:

- Institutional Advancement staff was better trained at individual solicitations
- Staff leveraged the Donor Research Database developed for the campaign to target and solicit donors
- Staff and Campaign volunteers emphasized the importance of committing to continuing Annual Giving when making campaign commitments
- Staff and Campaign volunteers reminded Board and Leadership Donors of the importance of Annual Giving to sustaining current school operations during the campaign

Campaign Momentum Key Take-Aways

- Find ways for the Board to see the campaign as the lynchpin to achieving the strategic goals of the institution
- For some constituencies, tying the success of the campaign to the capital improvements is critical for engaging interest and ultimately support for the campaign
 - The Parent Campaign Committee's message to middle school parents is – the high school is fantastic now, we can't wait to see what the new building will do
 - For faculty and staff we are raising money to give you the facilities to soar
 - For the finance folks – the campaign is driving increased admission yield

About CCS

Founded in
1947

Leading consulting and
management firm for
non-profits

Provides campaign design and
management, development services,
and strategic planning and
consulting to diverse non-profit
institutions

Diverse Client Roster:

- Schools, colleges, and universities
- Hospitals and medical centers
- Religious institutions
- Arts, civic, and cultural organizations
- Environment and conservation organizations
- Voluntary health organizations
- Associations and advocacy groups

New York, Chicago, Dallas,
San Francisco, Boston,
Los Angeles, Washington,
Baltimore, St. Louis, London, Dublin

Overall, CCS helps our clients raise approximately
\$6 billion per year

CCS Experience with Independent Schools

In our 67-year history, we have played a vital role in the empowerment and expansion of secondary education institutions, raising more than **\$1.3 billion for secondary schools throughout the world**. The following is a snapshot of our work with independent schools.



The Spence School
New York, NY



Ranney School
Tinton Falls, NJ



The Chapin School
New York, NY



The Town School
New York, NY



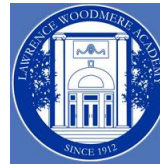
Kent Denver School
Englewood, CO



Hawken School
Gates Mills, OH



Open Window School
Bellevue, WA



Lawrence Woodmere Academy
Woodmere, NY



Ensworth School
Nashville, TN



Langley School
McLean, VA



Calvert School
Baltimore, MD



St. Ann's School
Brooklyn Heights, NY



Fairfield Country Day School
Fairfield, CT



The Gunston School
Centreville, MD



Berkeley Carroll School
Brooklyn, NY



Stanley British Primary School
Denver, CO



Elmwood Franklin School
Buffalo, NY



Hampton Roads Academy
Newport News, VA



The Wilson School
St. Louis, MO



Malvern Preparatory School
Malvern, PA

QUESTIONS AND DISCUSSION

Thank You!



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Learn more about our transformative fundraising programs.



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