



**NSFA**  
National School Foundation Association  
Building Essential Foundations for America's Schools

**Growing Your School Foundation:  
Alumni Fundraising NYSSBA**

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**Value of a K-12 Foundation**

What benefit does your school foundation bring to your community?

- Builds communication
- Raises awareness of school needs
- Improves academic and educational opportunities
- Prepares future school board members
- Adults representing the community's educational support

**Offers the community the opportunity to be a part of the solution...support education**

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**Seven Principles of Alumni Fundraising**

- Find them / invite them to get involved
- Use events to develop interest/relationships
- Use literature pieces to develop understanding
- Build personal relationships to enhance relationships and develop commitment
- Understand the value of past staff relations
- Offer programs that resonate with alumni
- Understand the characteristics of alumni as major donors

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**New York State School Boards Association  
2009 Annual Convention, NYC  
October 15-18, 2009**

**Des Moines native bequeaths \$75 M to Marist**

Raymond A. Rich, a wealthy industrialist who grew up in Des Moines and graduated from Roosevelt High School, has left a bequest estimated at \$75 million to Marist College in Poughkeepsie, N.Y.

The gift was the largest in the history of the independent liberal arts institution, a school spokesman said Friday. The bequest included a riverfront estate in the Hudson River Valley with an estimated value of \$65 million, plus a \$10 million endowment.

Des Moines Register, October 5<sup>th</sup>, 2009



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**1. Finding Alumni**

Google

Social networking sites

Professionals: Harris Connect

**Kathleen A. Brooks**

Senior Account Executive

Harris Connect

866-355-1100

[kbrooks@harrisconnect.com](mailto:kbrooks@harrisconnect.com)

School records

Yellow pad method with

staff

other alumni

retired staff

A committee of the board should develop an on-going process



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**Invite them to get involved**

1. Paper

2. People

3. Cyber

Mailings

Newsletters

Phone calls

Personally

Response envelopes

News blasts

Website

Surveys

Facebook

Twitter

Other alumni sites



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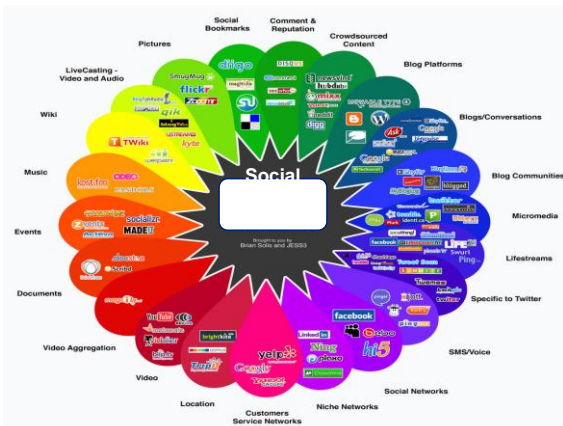
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New York State School Boards Association  
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### 2. Use Events to Develop Interest

Events are not the end all of fundraisers, but an entry point for many donors  
Events may occur anywhere in the world.  
Events may be large or small  
Most commonly occur at or near the school  
Best if donors can meet with students and staff  
Events offer potential donors a relaxed/formal opportunity to:  
Meet other donors  
Meet staff and officials  
Learn how their gifts impact students



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### Getting them to events / When / Type

- Personal invitation
- Phone call
- Personal letter or note
- Personal e-mail
- Personalized letter
- Form letter
- Newsletters
- E-newsletter

Seasons of fundraising: Fall, Spring and Summer

Build around some kind of alumni weekend, homecoming, graduation, building dedication, awards, play, concert, lunch, whateveretc.



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**3. Three Essential Literature Pieces**

1. Response envelope or on-line opportunity, always offer one directly to the potential donor. (Simple, offer a low level gift opportunity, one choice and other)
2. Palm card, cool, slick and easily and proudly distributed
3. CASE statement; a longer document covering the following key items
  - Cause: List two to five critical issues you want to support
  - Actions: What do we want you to do and why
  - Success: What's our vision
  - Emotion: How your gift can make a difference




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**3. Three Essential Literature Pieces for the Event**

- Imbed a tag line that proclaims a measurable activity which your foundation accomplishes
- Response envelope or on-line opportunity, always offer one directly to the potential donor (see previous slide)
- Palm card, cool, slick and easily and proudly distributed
- CASE statement; a longer document covering the following key items
- Cause: List two to five critical issues you want to support
  - Actions: What do we want you to do and why
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**Literature Pieces; Retain Focus Increase Knowledge**

Should emphasize outcomes for kids  
Before anyone asks someone else for money...  
he had better be able to say how much he wants  
what he is going to do with it  
why he has to ask for it  
what benefit the donor will get out of giving it

"The case statement is the basic document on which individual solicitors must depend in answering the prospective donor's questions, and encourage potential donors."

Heston, Herbert N. The Case Statement




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#### 4. Build Personal Relationships With Alumni

- Events
- Home visits
- Phone calls
- Notes
- Cards
- Coffee
- Lunch
- E-mail
- Social networking
- Ask board members/team members to try a 3 x 3 process

"Target Illustration"



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#### 5. Understand Value of Past Staff Relations

There have been years of involvement and investment of time by teachers, staff and administration in student's lives

Countless hours of help, tutoring, coaching and assisting parents with the lives of alumni when students.

Ask these staff members to help

- Get involved themselves in the foundation payroll auto w/d
- Assist to ID potential donors
- Reach out
- Re-build a relationship
- Tour the building
- Make the ask



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#### 6. Offer Programs that Resonate with Alumni

Develop programs which alumni can see value in

- Music
- Technology
- Athletics
- Science
- Performing arts
- Speech
- Politics
- Debate
- Entrepreneurial
- Engineering
- Social needs
- "Street" work



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### 7. Alumni Potential to Become Major Donors

Major donors are responsible for nearly 80% of all financial resources donated by individuals

Alumni are responsible for most major gifts to educational institutions

Define a major donor and how many you need to accomplish your fundraising goals.



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### Major Donor Characteristics

Their need to give is often greater than your need to have

Most know exactly why you are calling

Many will test you for product knowledge, enthusiasm personal commitment

Want a grandparent relationship with the organization

Usually don't want to make a single gift to the organization.

Jim Holdman, IFDS Inc, 2007



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### Major Donor Characteristics

Seeking maximum benefit from their donated dollars

Don't want the org to become dependent upon them

Often require a series of informative calls

Don't respond well to deadlines.

Often give an impulse gift to test their level of fulfillment

Often need to know other major donors are involved

Ask for advice, not for money, then listen



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### Major Donor Characteristics

Remember always, in fact memorize the fact that you are offering a potential donor an opportunity to make a difference in the lives of the kids of the community

Most know other major donors...ask for referrals



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### Seven ways to Raise Money

- Direct Solicitation
- Events
- Phon-a-thons
- E-solicitations
- Direct Mail
- Grants
- Sponsorships/business partnerships/sales/endorsements and contracts (Think "for profit" type activities)



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### Seven Basic Truths of Fundraising

- Organizations are not entitled to support
  - they must earn it
- Successful fund raising is not magic
  - it is simply hard work
- Fund raising is not raising money
  - it is raising friends
- You do not raise money by begging
  - you offer the opportunity
- People do not just reach for their checkbooks
  - you have to ask
- You can't decide to raise money today, & ask for it tomorrow
  - it takes patience
- Treat prospects and donors as customers

Rich Houge, Northwest Minnesota Foundation



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### CULTIVATE Major Donors

- First** Attract them to your foundation  
- are you?
- Second** Sustain their interest with real-life stories  
- how schools & children have been helped by your foundation  
- focus on outcomes for kids
- Third** It takes time, maybe years to cultivate a major ask. Stay active! Stay in touch!  
Make use of contact management software/programs



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### SOLICIT Major Donors - Making The Ask

- |                        |   |
|------------------------|---|
| 1. Open                | Are you enthusiastic about the cause?<br>Demonstrate why YOU donate.  |
| 2. Question            | What do they think about the state of education?<br>Are they happy? Let them talk.  |
| 3. Listen              | What can be done to improve education for our children or grand children?   |
| 4. Present             | Is your solution the best? Will it perform? How will I benefit? Use charts, statistics, pictures, or testimonials to demonstrate effectiveness. |
| 5. Overcome Objections | Many objections are really questions. Respond honestly and never make excuses. Demonstrate how THEIR gift might help answer the objections.     |
| 6. Ask for the Gift    | Make the ask large enough. Think of "the ask" as an invitation/offer to join the cause of your foundation!                                      |



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### Characteristics of a Good Ask

- Right time
- Right place
- Right person being asked
- Right person asking
- For the right amount
- With the right attitude



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### Reasons You Didn't Get the Gift

- Didn't call ahead to arrange an appointment
- Not prepared
- Anxious
- Assume too much
- Failure to probe
- Didn't make 'the ask'...or offer!
- Didn't know the donor and his/her interests (dog's name)



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### Handling Objections to the Ask

- No doesn't always mean no!
- Be persistent
- Ask at another more convenient time
- Ask for a different amount or resource
- Ask for help from a friend or acquaintance
- Ask an executive to go with you next time



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### Thanking, Acknowledging & Recognizing Donors

- Value the donor more than the donation
- Acknowledge donations immediately
- Acknowledge larger gifts with a phone call or personal visit.
- Ask others to help acknowledge and thank the donor: board chair, superintendent, other board members
- Stay in touch with donors between donations with a phone call, coffee, newsletter, personal note, clipping, e-mail, birthday or anniversary card, calls from BOD or Admin.
- Recognition levels should be set.
  - Plaque, pen, certificate, listing in the annual report, name engraved, flowers, apple pie, call from someone prominent, etc.



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**Popular Presentations to Donors:**

**1. Bricks and Mortar: A building project**

A great way to honor someone or cause for years

Rules for naming rights (50%+)

Prepare and sign a donor agreement; between the donor and the organization receiving the gift.

Develop a nice recognition plaque/bricks/books/tree.



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**Popular Presentations to Donors:**

**2. Endowments:**

A permanent asset invested to produce annual income.

- Requires a long term commitment
- Requires dedication to invest for the future
- Annual income reduces pressure to raise current funds
- Appeals to a percentage of donors

Endowment building occurs

- Slowly with small gifts
- Rapidly with major gifts



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**Popular Presentations to Donors:**

**3. Planned Giving**

Make it simple

- Use advisors, CPA, attorney, insurance
- Communicate the need
- Get prepared literature
- Deferred gifts average in excess of \$40,000

90% of US give

Less than 10% make bequests

- They are not asked
- They are not informed
- They didn't think about it



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**Popular Presentations to Donors:**

**4. . Online & Web Based Giving**

should be a critical part of your offer

- Online donations are 20-25% higher
- 40% of individuals visiting a website make a donation
- Offers online payment for events
- More than one in three donors to an on-line fundraising website say they would not have given at all without an on-line option



Give2Schools offers...

- Saves significant labor costs over manual processing
- Receive instant notification
- Assures private and secured transmissions
- Earns interest from funds deposited into accounting
- Accepts credit cards without incurring additional fees

As a member of NSFA, there are no set up fees and no monthly minimums required. A flat percentage of donations made during the month will be assessed.



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**Problems to Avoid**

- Are you a donor?
- Are the foundation board members donors?
- Is the administration behind this project?
- Is the staff behind this project?
- Key questions about the project.
- Events only, need to mix it up!
- Don't get caught in low level fundraising forever




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**Thank You!**



*"Education is for improving the lives of other and for leaving your community and world better than you found it."*

Marian Wright Edelman

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