

Advancement Alliance

Wednesday, April 14, 2010

Head of the Class:

What Heads REALLY want from their development officers
Dedham Country Day School

In Attendance: Tobey Fossey, Belmont Day School, Leslie Bowen, Dedham CDS, Julie Hagan, Dedham CDS, Devorah Kosowsky, Partnership for Excellence in Jewish Education, Rod Boyer, Roxbury Latin, Eliza Drachman-Jones, The Park School, Mary Lou Amrhein, Jackson Walnut Park Schools, Amy Klotz, Nobles, Jeri Goetz, Chestnut Hill School, Shira Levin, Beaver CDS, Doug Zack, Catholic Memorial School, David Erwin, Catholic Memorial School, Tania Monahan, Amanda Frank, Brimmer & May, Nancy Drour, Brimmer & May, Jenna O'Donnell, Chestnut Hill School, Ashley Linell, Dedham CDS, Jackie Deysher, BB&N, Joanna O'Donnell, Park Street School, Tracy Bradley, Park Street School, Jody Barron, Tenacre CDS, Victoria Londergan, Jackson Walnut Park Schools.

Welcome and Introductions

Three Heads of Schools introduced: Paul Scheff, Catholic Memorial; Anne Reenstierna; Brimmer and May; and Nick Thacher, Dedham Country Day School.

A few key facts about each school represented was given by each Head:

- Catholic Memorial

Grades 7-12, Boys, High School and Middle School 725 students

Annual Giving: \$1 million

\$3.5 million endowment

\$1 million cash

Founded in 1957

Late to advancement

(Paul was in 2nd graduating class)

- Brimmer and May

Coed Pre-K-12 Day School

400 students

130 years old started fundraising in 1970

Small development office has part-time planned giving officer, asst. director, and director

\$9 million endowment from \$150,000 at beginning

Annual and capital giving \$1-2 million per year
25th year at the school

- Dedham Country Day School

Pre-K-8

258 students

Development office has full-time director, full-time communications director, part-time events and annual fund director, and part-time development associate

\$500,000 Annual Fund, significantly higher than 2-3 years ago

Woefully under-endowed

107 years old

6th year at the school

Program

The relationship between the Head of School and the development office is extremely important to fundraising success. Describe some of the nuances of this relationship and suggest ways to make the most of any situation.

Anne

It's critical that the Head work closely with development. The Head is responsible for the message about mission, vision, and goals, but expects staff to organize effort. We work together on daily basis; meet constantly throughout the day. Constant open communication is important.

Nick

Close communication is key; as Head, privy to what's going on with kids and families. We're a small school so we know individual kids—who went home in tears, etc., for example. I'm the person to alert the team. Nuance of relationship between director and board, as School Head, is problematic. Must be open and candid about Head. Lines of communication should be direct, not through Head.

It doesn't do any one any good to worry if faculty are going to think well of the development office. Teachers are in schools to work with kids; they are not going to remember to keep you informed. Find ways to work in to routine of classroom. The best stuff is being done by those who do not toot their own horn.

Head's daily routine is like having ADHD, trying to keep in the loop, so many things pulling at you all the time.

Paul

The role of the Head is to articulate the mission and vision and acquire resources. You live your life in units of two minutes. Advancement is a more orderly world. Faculty doesn't understand the role of advancement. My focus is external. I do not know everyone's name. My job is to find talent and financial resources. Disposed to spend time with advancement.

Discuss the importance of setting clear expectations, both from the head and from the development staff

Nick

Alignment of everyone involved in advancement is so basic. No one wants to be surprised. Need to be nimble and flexible, whether good or bad news. You must have the capacity to absorb or react on the fly. Ashley expects me to alert her if I'm about to expel someone, for instance.

Paul

We lead fractured lives. I need to know what advancement is trying to accomplish and what is my role. If the Head has to ask advancement how things are going, it's not good. Your business is just one piece of our business. Help the Head of school understand where things stand. Your responsibility to help Head of School keep track of projects and know where I'm supposed to enter in.

Anne

You may be asked by trustees, where is the annual fund today? Did you get a particular gift? You should be clear about your expectations of the development office. I don't like to make call or set up appointments with prospects. I won't set up a meeting. Be clear. Each person is different. They need to know what you want to do.

A Head of School should be the chief storyteller. How do you work with your development offices to refine your stories?

Paul

I'm a graduate and served as a board member for six years. I'm the only person who knows the founders. I have stories that are quite dated. I'm able to connect history of school (because I lived it) with the reality today. There have been a lot of changes among Catholic schools.

Anne

It's important when you tell stories that they are on message. The point is to support the school's mission. I'm just one person. I encourage members of the development office to be part of the community, to make connections with students and alums, so they'll have stories to tell.

Nick

For the Centennial Bulletin, I went into the school's archives to exhume mission statements. I was elected to write the history of the school coming in as interim head in the middle of the school year. The real stories are written in history and mission statements. Every member must understand these thoroughly, not superficially. Every ten years, there is an AISNE review, and part of it is to evaluate the mission. Get yourself involved. What does it mean to you? Give an "I have a dream speech" once a year. No one else will do that. Institution will stagnate if you don't.

What contributes most to development staff motivation? How do you foster an effective relationship with the development staff?

Anne

To be effective they must have a belief in the school and be passionate about the school's mission. The staff members in my office are both alums, so the commitment runs deeper and there is an additional motivation factor. You can see the positive effects of your work and enjoy the fact that many students are benefiting from your work, through receiving financial aid, for example, or enjoying enhancements like new buildings. You must meet together and respect their opinions. They should have a say. That motivates them to do the best job.

Paul

Pay them what they're worth. The most compelling narcotic is success. Knowing that their efforts led to someone else's success. When you're winning, what you're doing, you're doing successfully. Academics are more likely than not going to marginalize your role. Make faculty partners in your success. I tell them; no money, no mission. Great ideas without funding are just great ideas.

Nick

Make sure you attend faculty meetings if you can. No one is more important than anyone else. Having different classes of faculty and staff not healthy.

Paul

Faculty live in a world of ideas. Advancement is a business, a different reality. Integrate life of advancement into life of school.

A successful development effort relies on building strong relationships between the development office and leadership volunteers. ... How do you work with the development office to foster these important relationships?

Paul

Most are around my age. Next year is our first 50th reunion. I know most of these guys. I have an advantage, being older and made of the same fabric. The challenge is integrating development into my world. The Head of School must integrate development into the conversation. It's natural that a donor with significant resources is going to want to talk to the person who owns the business. Head of Schools come and go. What last are the relationships with the school, not the Head.

Anne

Finding and nurturing volunteers is one of the more difficult tasks of day schools. Many are willing but you're not sure of their motivation. It's hard to manage personalities, motives. Help them. Stop by the meetings of various committees. By spending a few minutes they know the Head of School is aware of their work and what is going on. Notes, public thank yous, teas, and dinners. Some may overstep or be troublesome, so you have to help the development office.

Nick

In the last two decades one of the things that happened is the pool of volunteers changed radically. Investment Banker moms stepped out of work to raise kids. They put their talent and energy into raising children. We had to develop activities for them, not just kids. It took schools a while to figure out how to handle this. Who are they, why are they volunteering, and how to manage them? Advancement works with the PA.

In the solicitation process, how do you work together with the development office on an ask.

Anne

I expect the development office to prepare me, do the research, and work with consultants to develop a strategy. I want to feel well informed. Often it's another board member who will make the ask. You must listen carefully, so you can adjust if necessary. You never know

what's going to happen. You need to be flexible. What's important is building the relationship over time and getting to know what's important to your donors. (Example of ask that started going wrong after her assistant backed her husband's new car into hers, then met construction on the way to the donor's home on the cape, so they had to call for directions, and finally, because they didn't realize that a gift of popcorn for donor had fallen apart in the car accident earlier in the morning, they spilled it all over the white carpeting in the donor's home when presenting it, but despite everything that went wrong, they received largest gift in school's history.)

Nick

(Story of first year at boarding school when Head of School got up at a parents weekend presentation to announce the school was out of money and needed \$40,000 to continue paying teachers and then went around the room with a tin bucket to collect the donations. An example of what was called Development in 1967.)

I expect to be teed up. Major donors have made up their mind by the time we make the ask, so what we're going to say doesn't really matter. I've had the situation of asking for a major gift and being told it wasn't enough, "I'm giving more." Not a good idea if the Head of School has to ask current families for an Annual Fund gift.

Paul

We have limited time. To the extent Head of School is involved, he must be provided information, have solid preparation. The most effective solicitation is when you're not talking, giving them an opportunity to talk about their dreams and aspirations. They ask themselves, "how do I use my wealth wisely, in a way that does the greatest good." Your stone in the cemetery is a date-dash-date. Your story is the dash. Philanthropy is a way to write your story. You're providing them an opportunity. It's the noblest work. It's a way to get outside themselves. There is no more fun than doing the ask. I don't think of it as an ask. People are happy to give. This is their lucky day.

How do you work with your development office to build a strong culture of philanthropy?

Active listening is a key behavior with prospective donors. Listen, make mission clear, everything will work out.

Paul

Many people are already philanthropic. Mission but also vision. Connect to stories. When the day's over how has a gift made a difference. It's not the numbers. It's the accomplishments. Made the world better for teachers and students.

Anne

We are working at it all the time. The development office made a challenge to staff. If everyone pledged, 100% staff participation, there would be a jeans and bagel day every month. Make them the leaders of the school. It was an important message and strengthened the culture of philanthropy. The development office works with students while they are still at school so they understand the meaning of philanthropy. Seniors have calling night for alums and other types of philanthropy.

Audience Questions and Comments

What effective ways have you found to work with alumni?

Nick: Favorite teacher came back for a reunion, moving to everyone.

Paul: Three retired faculty members, the "gray hairs," brought them all over the country.

Anne: Must segment, what kind of event for each group, not all together. Cater to different audiences (e.g., young alums to bar through Facebook).

Nick: Think outside the box to distinguish your school. Distinguish magazine from everyone else's.

B&M: Know their stories; make them feel a part of school, story still alive. Faculty are critically important. Thank faculty. Fundraise with faculty. One project can unite the school—Build a Well in Africa. Philanthropy Committee.

Respectfully submitted

Leslie Bowen

Dedham Country Day School