



## **Shifting the Paradigm: An Examination of Advancement Trends**

**WCRIS Leadership Conference**

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**ACTION PLAN:**

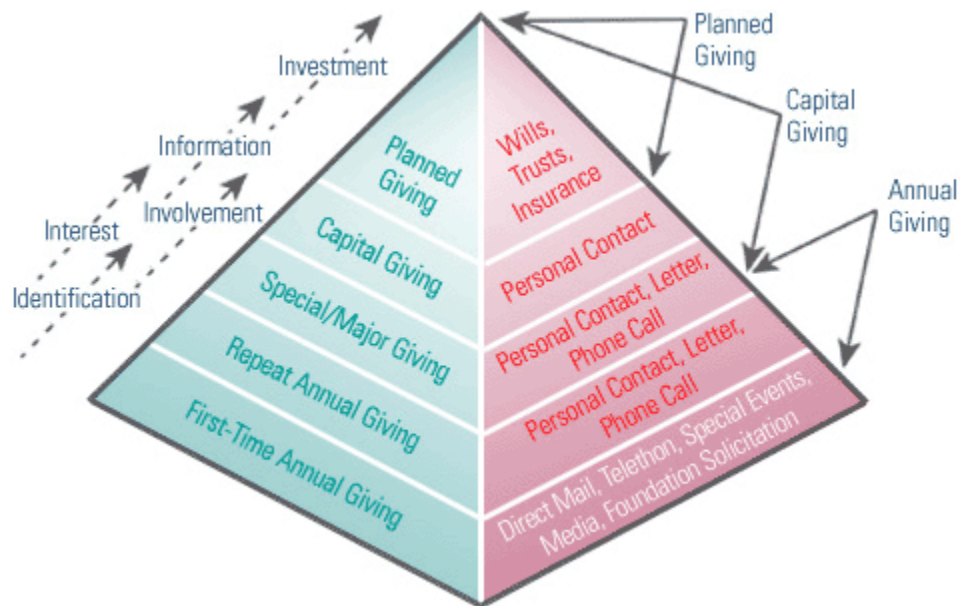
Research shows that if you use an idea within 24 hours of hearing it, you are more likely to integrate it permanently. So when you hear something in our session today that you'd like to use, write it down on this page immediately. At the end of the session, take it back to work and hang it where you can't miss it. That way, you will put your action plan into action!

The actions I'll take:

I'll get started by:


# An Overview of Development

## The Pyramid of Giving



### The Pyramid of Giving

The "pyramid" reflects the stages through which a donor moves as commitment increases. In a sophisticated development operation, the goal is to qualify current donors at each stage and encourage upward movement wherever appropriate.

- **Annual Giving:** is the primary fund-raising method used to broaden support, upgrade giving levels, and provide operating support for on-going programs.
- **Capital Giving:** is an intensive, organized development effort to secure philanthropic gifts for specific capital needs or projects, executed within a specific time period, usually over one or more years.
- **Planned Giving:** is the integration of sound personal, financial, and estate planning concepts with the individual donor's plans for lifetime or testamentary giving.

*Remember, development is a process not an event!*

Source: <http://www.uwwp.org/pdfs/pyramid-giving.pdf>

# DEVELOPMENT VS FUNDRAISING: AN OVERVIEW

This overview summarizes the differences between development and fundraising.  
(From ISPD development/advancement webinar on 26 May 2016 (Frank Donaldson))

## **DEVELOPMENT**

### BASIC APPROACH/CONCEPTS

- Commitment of chief administrator and board to development
- Complete integrity
- Principal concern is quality.
- Good business management
- Long-range, strategic planning
- Public Relations and Communications are prerequisites
- Invites substantial investments
- Goals and objectives clearly written
- Negotiate from position of strength
- A positive attitude is permanent
- Publics involved on a continuing basis

### PROGRAMS AND PROJECTS

- Establishing endowment
- Annual Fund
- Marketing research--concentrating on needs of people
- Business and foundation grants
- Research major prospects
- Involve influential, affluent people
- Capital Campaign
- Planned Giving
- Long-range, strategic planning
- Clear Mission and Vision
- Distinct verbal and visual images
- Written Strategic Plan for Development

### RESULTS (effects)

- Large private gifts received on consistent, annual basis
- Money programmed for 5-10 years
- Working from clearly projected advancement plan
- Positive attitude developed
- Problems are looked upon as challenges.
- Obstacles are seen as opportunities.
- Annual Report of school finances to all publics
- Supporters of programs have strong interest in programs

## **FUNDRAISING**

### BASIC APPROACH/CONCEPTS

- Panic reaction to negative deficits
- "Poor pitiful me"
- Crisis orientation
- Project-oriented; year-to-year
- Temporary solutions
- Limited objectives-short range
- Immediate solution demanded
- Shaky, unreliable, insecure
- Amateur approach; stopgap measures
- Hit and miss
- No planned, continuing efforts
- Negotiate from position of weakness
- "Help" "Need" "Poor" "Assist"

### PROGRAMS AND PROJECTS

- Bingo
- Duck Race
- Annual Bazaar
- \$100-a-plate dinner
- Silent Auction
- Easter Bunny Rabbit Sales
- Candy drive
- Festivals
- Garage Sale
- Golf Tournament
- Mardi Gras ball
- Fair

### RESULTS (effects)

- Recurring financial crisis
- Confused job specifications
- Working one year at a time
- Raising money on crisis orientation
- High volunteer turnover
- Vague financial reporting
- No records of past progress
- Changes made for change sake
- Unwritten assumptions
- Vague organization chart



## **CATHOLIC HIGH SCHOOL ADVANCEMENT PROGRAM PLAN**

### **Goal #1: To raise donor sights through leadership giving**

- Solicit all remaining capital campaign leadership prospects for gifts of at least \$10,000.
- Solicit all previous annual giving donors of \$500 and above (who have not been approached during the capital campaign) for gifts of at least \$10,000.
- Ask all previous annual giving donors in the leadership category for increased gifts.
- Add 100 donors to top annual giving gift club.

### **Goal #2: To increase the donor base**

- Seek 100% support among senior class parents.
- Increase annual giving donor pool by 10%.
- Increase alumni participation to 45%.
- Increase parent participation to 95%.
- Successfully seek gifts from 100 SYBUNTS.
- Achieve five new foundation grants.
- Offer donors who have made multi-year annual giving pledges during the campaign the opportunity to continue multi-year pledging.

### **Goal #3: To increase total voluntary support for the school.**

- Achieve annual giving goal of \$1,000,000.
- Complete capital campaign by raising additional \$5,000,000 in pledges and gifts.

### **Goal #4: To increase level of professionalism and efficiency within the Advancement Office.**

- Review goals and objectives quarterly.
- Evaluate program at year-end.
- End each staff member to one conference which he will summarize in writing for the entire staff.
- Update job description for each staff member.
- Institute policy for dealing with the media and the constituency in a crisis situation.
- Develop a five-year plan for equipment upgrade.
- Upgrade computer literacy of each staff member.

### **Goal #5: To communicate effectively with the entire constituency.**

- Publish magazines in September, January and April.
- Publish campaign newsletters in November and May.
- Communicate regularly with annual giving volunteers, alumni class secretaries, the Alumni Board, and the Board of Trustees.
- Publish a new school calendar featuring student art.

**School Information**

2755 55th Street  
San Diego, CA 92105  
www.nativityprep.org

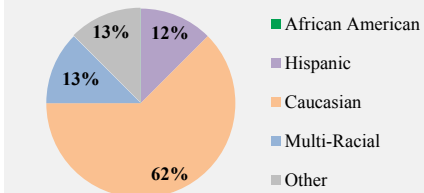
Founded: 2001      Enrollment: 65  
Grades: 6-8      Capacity: 60

**Mission Effectiveness Standards**

1. Faith Based
2. Serve the Economically Poor & Marginalized
3. A Holistic Education
4. Partners with the Family
5. Extended Day & Year
6. Commitment Beyond Graduation
7. Effective Administrative Structure
8. Ongoing Assessment and Inquiry
9. Active Network Participant

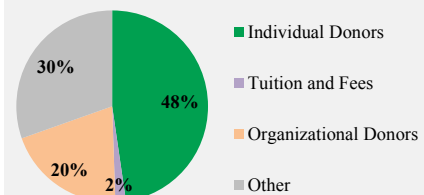
**2017-18 Staffing**

Full-time Teachers: 8  
Part-time Teachers: 0  
Race/Ethnicity:

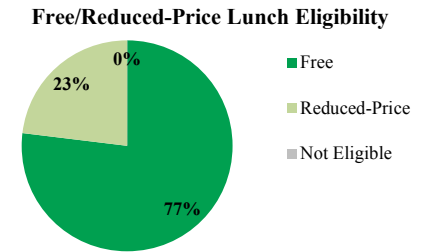
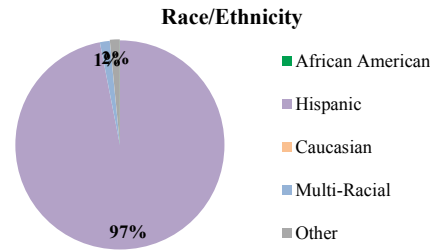
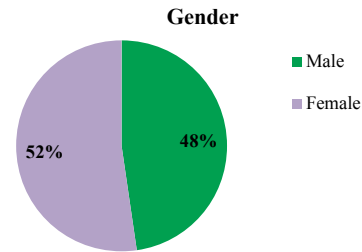


**2016-17 Financial Information**

Total Operating Expenses: \$501,300  
Cost per Student: \$7,833  
Total Revenue: \$1,160,114



**2017-18 Student Demographics**

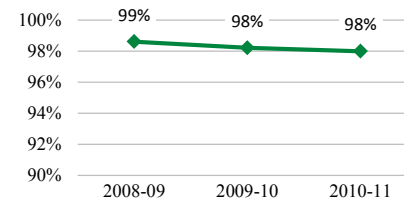


**School Culture**

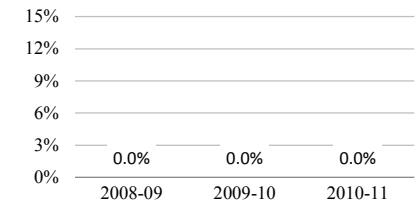
**Environment**

Instructional hours per day:	10.0
Evening Study Hall Provided?	✓
Summer Day Program?	✓
Is Attendance Required?	✓
Summer Camp?	✓
Is Attendance Required?	✓
Parent Meetings Required?	✓

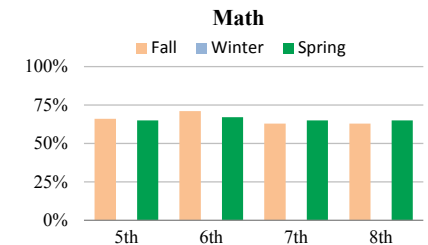
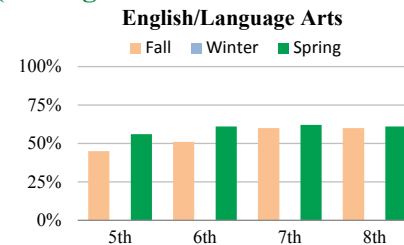
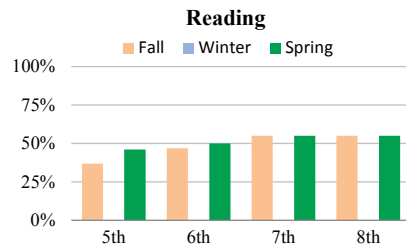
**Average Daily Attendance**



**Annual Dismissal Rate**



**Class of 2010-11 Academic Proficiency (Average National Percentile Score): TerraNova**

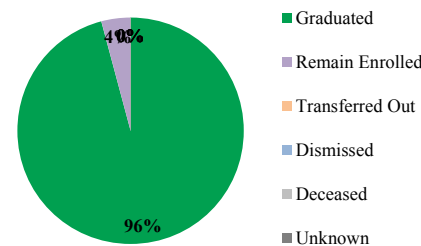


**Class of 2016-17**

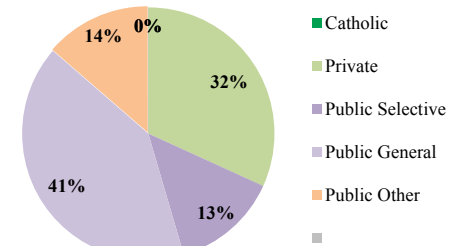
**Class Summary**

Students Originally Enrolled:	21
Students Transferred In:	3
<b>Total Students Ever In Class:</b>	<b>24</b>
Students Graduated:	23
Students Remain Enrolled:	1
Students Transferred Out:	0
Students Dismissed:	0
Students Deceased:	0

**Class Graduation Rate**



**Graduate Matriculation**



## DATA VISUALIZATION RESOURCES:

Infogram: <https://infogram.com/>

Tableau: <https://www.tableau.com/>

Piktochart: <https://piktochart.com/>

Google Marketing Platform:

<https://marketingplatform.google.com/about/data-studio/>

Datawrapper: <https://www.datawrapper.de/>

Chartbuilder: <http://quartz.github.io/Chartbuilder/>

Open Refine: <http://openrefine.org/>

Chartered: <https://www.chartered.co/>

Google Charts: <https://developers.google.com/chart/>

Timeline: <http://timeline.knightlab.com/>

Canva: <https://www.canva.com/>

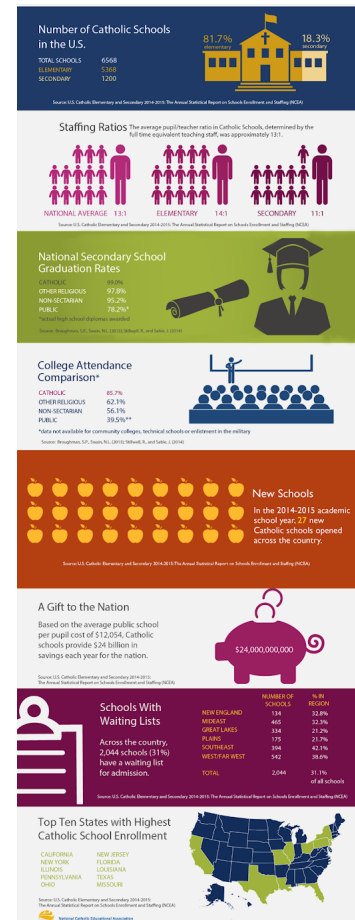
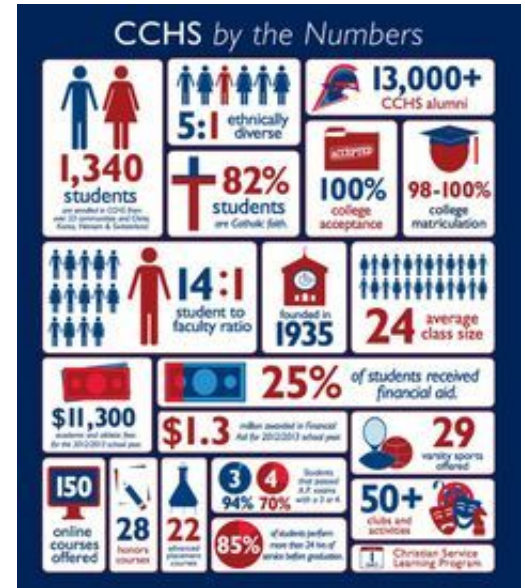
PowerBI: <https://powerbi.microsoft.com/en-us/>

Palette Generator: <https://learnui.design/tools/data-color-picker.html#palette>

Color Brewer 2.0:

<http://colorbrewer2.org/#type=sequential&scheme=BuGn&n=3>

Tayasui Sketches: <http://tayasui.com/sketches/>



## Tuition & Fees

	Less than \$49K	\$50K to \$99K	\$100K to \$149K	\$150K to \$199K	\$200K to \$250K
<b>Household Income</b>					
<b>Average Award</b>	85% of tuition	73% of tuition	48% of tuition	46% of tuition	20% of tuition
<b>Average Cost</b>					
@OAK HILL	\$2,335	\$4,335	\$8,735	\$9,135	\$13,835
@VILLA DUCHESNE	\$2,850	\$5,550	\$11,150	\$11,650	\$17,750

The chart reflects financial aid and scholarships awarded in the 2018-19 school year with household income verified through Smart Tuition Aid.

## **SOCIAL MEDIA: Resources**

- Hubspot: <https://blog.hubspot.com/marketing/social-media-marketing-resources>.
- Social Media Examiner: <http://www.socialmediaexaminer.com/>
- Hootsuite: <https://blog.hootsuite.com>
- Finalsite Social: <http://www.finalsite.com/blog/social-media>

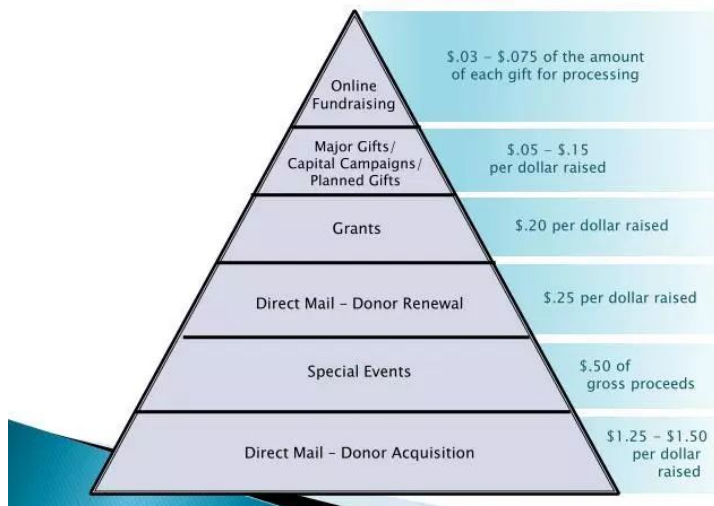


## FUNDRAISING EXPENSE PYRAMID

The standard that many folks quote when identifying an appropriate cost per dollar raised for Annual Fundraising is often 20% or 20 cents for every dollar raised. This number has its origins in the book, Fund-Raising: Evaluating and Managing the Fund Development Process (1999), in which James Greenfield observed the following costs associated with different kinds of fundraising:

Fundraising Activity/Method	Average Cost to Raise One Dollar
Capital Campaign/Major Gifts	\$0.05 to \$0.10 per dollar raised
Corporations and Foundations (Grant Writing)	\$0.20 per dollar raised
Direct Mail Acquisition	\$ 1.00 to \$1.25 per dollar raised
Direct Mail Renewal	\$0.20 per dollar raised
Planned Giving	\$0.25 per dollar raised
Benefit/Special Events	\$0.50 of gross proceeds
National Average	\$0.20

### Fundraising Expense Pyramid



## **STRATEGIZING the MAJOR GIFT REQUEST:**

### **Questions to Consider**

1. How much could the prospect afford to give if our school were his or her major philanthropy over the next three years?
2. Is the prospect ready to be asked? Is he or she sufficiently interested and involved in our school and invested in the success of our current campaign to make it likely that his or her gift will match his or her potential? If not, what pre-solicitation cultivation is appropriate?
3. Who should be present during the gift solicitation? A spouse? A child? A parent? A financial advisor?
4. Who are the right individuals to make the ask? Which one of them should be responsible for the specific request?
5. When and where should the solicitation take place? In the office or at the home? At breakfast or lunch? In the evening?
6. Does the prospect have values, traits, or habits which should inform the gift request? For example, does he or she enjoy a leisurely conversation or does he or she prefer to get to the point quickly?
7. Which aspect of the school's campaign agenda would most interest the prospect? The student center? The technology? The athletics?
8. Would the prospect be interested in a gift named in honor or in memory of an individual or family of his or her choice?
9. Would the prospect be interested in a gift named in honor or in memory of an individual or family of his or her choice?
10. What is the right amount to request at this time?

## **Critical Factors in Preparing for Your Capital Campaign:**

Five factors should be analyzed prior to any type of fundraising effort. Those factors are:

- 1) A strong and effective case for support a capital campaign will only be successful if the case for support or reason for the program is strong and effective. The case must be well defined an outline how the funds raised in the campaign will be used. The needs presented must clearly explain the rationale for the proposed project the financial need and the benefits to be gained by the institution if the case is supported. The case must make sense to those you will approach.
- 2) The availability of committed enthusiastic readership. This begins with organizations internal literers key executives board members and volunteers all of them should be fully supportive of the effort and willing to assist. Preparation for the campaign must include an analysis of leadership commitment to determine if the majority of leaders are willing to provide their energy time and financial resources to the effort. They are not committed it is almost impossible to attract extra volunteer leadership or financial support for the campaign.
- 3) The availability and capability of prospects able to support the campaign for a major campaign to be successful at prospect face must be identified early in the process the number of prospects in their potential gift capacity will help determine if the campaign will be successful and how much can be raised. You have a magnificent case in the house to grab committee leadership but if the prospect base is not sufficient you'll have difficulty achieving objectives.
- 4) The development of a campaign plan. Every campaign should have a plan of approach including structured time in prospect solicitation techniques critical path public relations marketing and research the campaign plan provides a blueprint for success and updates the staff and volunteer leadership through day today campaign activities. Preparation for a major campaign must include development of a plan which clearly outlines how objectives will be achieved.
- 5) Feasibility study or readiness assessment. This is an important factor in the overall campaign process because it can help finalize the first four factors and provide the necessary information for an organization's leadership to move forward with a major campaign. You can also provide that confidence necessary to make the important decision to proceed with the campaign or protect you against making the wrong decision to move ahead when you were not prepared. The last factor provides this final critical step to ensure you are prepared to conduct a major capital campaign.