# EVOLUTION

*The newsletter for annual giving professionals*   *Volume 1,   Issue 4*

**MAY, 2004**

## Senior Class Gift: A Sample Program

Probably the most challenging of annual giving efforts, this campaign is an essential building block in creating a culture of philanthropy. A program needs to be established that addresses the main objections made by seniors, namely:

- Lack of money
- Designation choice polarizing, too narrow
- Perception that the university doesn't need the money due to tuition costs

These objections should be met in a way that establishes habits of:

- Pledge fulfillment
- Giving to programs, not projects
- Understanding of philanthropy's role

Ask amount strategies should be year of graduation ($20.03, $20.04, ect.) and if no outright gift can be made, should move to pledge that is due the September after graduation. Explore seeking a three-year pledge of $100 ($20 first year, $30 second year, $50 third year). This will eliminate the "I don't have any money" excuse, while enforcing the habit of fulfilling a pledge in the fall that is upgraded annually. Also, this is what is asked of all alumni, thus hopefully habit creating.

Move away from special aesthetic projects to academic programs and designations that directly impact students. On the gift card, provide varied program options, just as you would to alumni. Offer the opportunity to support their school of graduation, general campus areas, and write in designations not listed on the card. This will eliminate the "I don't like the designation option." They will have many options with their selection based upon affinity, thus hopefully habit creating.

The key with this group however, is the creation of a way that the seniors on campus can realize first-hand the impact of philanthropy. Most senior efforts on college campuses focus on projects not realized until after the seniors have graduated and moved on. Instead, it is recommended that textbook awards be created by college/division and awarded to current seniors annually. These awards would be advertised with a formal application process during first semester every year. A volunteer senior class gift committee would review the applicants and make the awards, while supervised by the annual giving office.

## Inside This Issue:

*Check out AFI's enhanced Web site www.annualfundinc.com*

# Fund Raising for Independent Schools

*By Patrick F. Bassett, NAIS President°*

There are several tried-and-true principles that the most successful independent schools use to guide their fund-raising efforts, including the following:

### 1. Know that Friend Raising is the Antecedent to Fund Raising:

Those schools with the most successful annual-giving campaigns and the largest endowments inevitably are those who have paid the greatest attention to their alumni, parents, and patrons long before any significant gift solicitation has occurred. According to CASE (The Council for the Advancement and Support of Education), three to five years of cultivation ("friend-raising") precedes, on average, major gift solicitation. For a good article on this topic, see "All Their Days," by Richard Barnhardt, Assistant Headmaster for External Affairs, Woodberry Forest School (VA) available in Looking Ahead: Independent School Issues and Answers (Avocus Publishing, Inc., Washington, DC 20007 TEL: 800-345-6665).

### 2. Know the Rules of Thumb for Capital Campaign Fund-raising:

- Capital Campaigns: At least $1 of every $2 (preferably $2 of every $3) raised should go to endowment. (Boards dominated with parents tend to prefer building campaigns for current children to benefit—over endowment campaigns: beware that this thinking does not dominate.)

- One-third or more of capital campaign total should be raised during the "quiet phase" from trustees.

- Target capital campaign levels at 10 times annual giving levels: i.e., if annual giving not already in strong shape, focus energies there first.

- Ninety percent or more of campaign dollars will be raised from five percent of your constituency: concentrate your efforts on that five percent.

- Eighty percent of gifts from individuals, only 10 percent from foundations and five percent from corporations (matching programs for the most part).

- Division of Responsibilities: The head articulates the vision and needs of the school and accompanies board members on major solicitations; board members set the example by generous giving and make the peer "ask"; the development office does background research and facilitates the entire process.

- Capital campaigns most often require campaign counsel: i.e., significant time and money must be expended for research, planning, and staff training to raise significant money for endowment. Count on 5-10 percent of goal for additional fund-raising costs. (Find on the NAIS website, www.nais.org, a list of development counsel.)

- Overall benchmark for development effort (in schools at the mature stage): raise three to five times as many dollars (averaging annual and capital campaign years together) as expended for total development office outreach effort (salaries, office expenses, publications, alumni events, etc.)

### 3. Target Grandparents Where the Money Is:

The grandparent generation has the two resources that the current parent generation tends to lack most: available time and considerable disposable/discretionary income.

- Good development practice warrants "friend-raising" before "fund-raising," and grandparents are no exception to this rule: schools should develop a year-long calendar and program of inviting and involving grandparents in the life of the school

# Senior Class Gift: A Sample Program

An awards/kick-off ceremony would be held during the beginning of the second semester. The publicity generated during first semester and second semester would demonstrate true and immediate impact.

### The account set-up is key

Textbook accounts by college/division would be established with 75% of the account total being awarded each year. The remaining 25% would serve as seed money for the next year as gifts continue to come into the account as pledges were fulfilled. Applicants would apply and if selected would receive money from their respective school textbook fund. Annual giving would administer the account with recommended payouts of $200 per award. Seed money can be placed into the accounts if desired to jumpstart the program and award process.

Class recognition as a whole is important, as it will contribute to creating a tradition of giving back. It is recommended that space be secured within a student center to establish a senior class honor wall to recognize student giving. The wall would consist of a riser with up to nine 8' x 11' plaques noting class year, dollars raised, and total donors. A class quote would also be noted. The quote is selected by seniors who make a pledge and select one of four possible quotes on-line or on the pledge card. This allows for classes as a whole to be recognized in a unique yet uniform visible way.

The volunteer structure should be set up similar to a United Way campaign, with the volunteers reaching down into each of the schools. College/division competitions based upon participation rates will greatly enhance the campaign. Leadership should be made a standing committee within the leading university student group. By having an established committee, the annual giving staff will save a great deal of time prospecting for volunteers. Instead, they will be able to start the year with a stable of leadership for the textbook award process, event, and fundraising activities. The future of the senior program will be peer solicitations; so establishing a leadership infrastructure that can grow is important.

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# Fund Raising for Independent Schools

- Grandparents are the ideal group to approach to begin or to invigorate a planned-giving program for endowment: they are at the right life-cycle stage, and they often have the resources to make a planned gift (charitable lead or charitable remainder trust or pooled income fund, for example). (See NAIS monograph on Grandparents.)

### 4. Make Certain Your Annual Giving is Robust.

(See on the NAIS website the NAIS Indicators for national data or STATS Online for customized giving benchmarks for similar schools.)

### 5. Coordinate All Fund-raising through the School's Development Office

- The Board is responsible for setting and approving all fund-raising objectives and campaigns, including those of the Parents Associations.

- Parents Association fund-raising must be coordinated with the development office so as not to conflict with or undermine annual giving and so as to match with the board-directed priorities for the school.

# Making Your E-Solicitation an E-Event

( "Less is more!" )

Over the past several issues, we have focused on the basics of E-fundraising: e-mail address strategies, addressing the need for a solicitation policy, a well-planned communication plan, and last month, on-line giving form basics. The next step would seemingly be that of E-solicitations. However, this isn't exactly the case.

There are two primary mistakes that institutions have made regarding E-solicitation:

• Utilizing Text Only Solicitations

• Send More Than One E-solicitation Within A Year

At the time of completing this article, I have had the unfortunate opportunity to learn that a college within our university has made mistake number one. A text message was sent to their constituency base with no graphics and the appeal was based on the fact that the fiscal year was coming to a close. Real compelling reason to give, huh? I digress as the latter is another article. It is a great example though, as the open rate was only 37% and the click through rate to the on-line giving form was less than one percent of the total audience solicited. This strategy, consistent with early web pages, is a duplication of the direct mail model. The E-solicitation should utilize the medium to its full extent. Sending an email is not special, does not engender warm feelings, and is quickly trashed if opened at all. Sending text only emails to solicit support will lead to larger number of "remove me from your list" than actual donors.

The second mistake is one that not too many institutions are making…yet. They will as they become more comfortable with the technology and email addresses continue to improve. A well known university has made the mistake of sending multiple E-solicitations over a short timeframe. The end result was a steady decline in the response rate. The novelty wore off. What first generated wave reviews, shifting to shoulder shrugging. This of course leads to my theory of "event" solicitations.

E-solicitations should be events in that they are unique, novel, bold, and occur less frequently. They should not be text only, but rather utilize flash technology, sound, and creative marketing themes. The frequency should be one time per year and compliment the overall annual giving solicitation strategy. For example, your calling occurs in the early fall, letter in late fall, then an E-solicitation in the two weeks prior to calendar year end. The "event" terminology refers to the uniqueness of the appeal and the fact that they occur once per year. It is something new and improved every year and compliments the solicitation cycle.

There are several great examples of E-solicitations that utilize flash, music, and imagery in the way that maximizes the medium. It truly combines the best of direct mail and the telefund into a compelling product. Many organizations have the technology to create these "works of art" in-house, while others out-source. There are several companies that are starting to specialize in this area (including AFI). A growing list of samples from other universities and vendors is located on the Resources Pages section of www.annualfundinc.com. They are all of high caliber and demonstrate the potential of this strategy. Keep in mind that when it comes to E-solicitations, less is more.

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# Staff Retention a Good Indicator of Program Quality

Albert D. Melfo, Director of Annual Giving, Kent State University amelfo@kent.edu

In the world of annual giving phone centers, part-time student employees continue to hold most of the positions. While it is possible to control employee turnover to a reasonable degree, turnover is nonetheless a natural part of the part-time work environment, and phone center managers quickly become familiar with the concept of the "revolving door" as callers come and go. It is an ongoing challenge to hire and train enough callers to maintain consistent staffing levels without sacrificing program quality. High caller retention is directly proportional to the overall quality of a phone center. High turnover, however, may be caused by any number of factors, many of which may point to underlying program weaknesses.

Instead of asking ourselves, "How do I reduce my caller turnover?" perhaps we should ask, "What can I do to improve my caller retention?" A good first step is to define your criteria for good and bad retention. Some programs are satisfied if any of their callers last longer than a month, while others find ways to keep student callers working for them for the duration of their undergraduate experience. Here are some questions to ask yourself about various facets of your program to help you further pinpoint potential problem areas and develop some strategies to address them.

**Compensation.** If you identify turnover as a problem, schedule some time to do a quick, internal program audit. Start with the basics, and make sure you have them covered. For instance, what is your base hourly wage? High turnover can be caused by something as superficial as an hourly wage that has steadily and quietly (but surely) slipped out of touch with reality. Have you noticed a drop in the number of applications that you are receiving? Survey your local job market. Is there a significant gap between what you are paying your callers and what they can earn in other part-time jobs in your area? If you identify this as a problem, correct it as soon as you can. Something as simple as your base hourly rate falling behind the times can have a huge impact on your ability to recruit and retain callers. Compensate consistent work with realistic wages, and find a way to reward performance that exceeds expectations.

**Recruiting and hiring.** While compensation is fairly easy it is to identify as an issue that can affect retention, don't assume that a change in your hourly wage alone will improve your retention. It might not be the real problem. If you have assured that your hourly wage is competitive, but you still feel that you're losing too many callers, then you likely need to look deeper. Who are you hiring? What does it take for a student to be offered a job in your phone center? How involved is your interviewing process? What do you look for in applicants? Who is doing the hiring? Effective recruiting is more complex than simply responding to applicants who have expressed an interest in the position and confirming that they can work the hours. In fact, recruiting is one of the most challenging responsibilities of call center managers. Accept that you will lose some callers, but understand that the more selective you are during the recruiting process, the better quality staff you will have. Selective hiring leads to higher retention, and higher retention builds program quality.

**Expectations.** Directors, managers and supervisors need to remind themselves that their callers' first priority (most of the time...) will be their studies. Remember also that this may well be the first "real job" that many of them have ever had. That said, there is no reason not to expect them to behave like responsible professionals when it comes to their phone center positions. We have a responsibility to them, as well – to be their guides and mentors, to train them and to develop their skills and sense of professionalism. A clear, written policy will help. Once new staff is hired, how do you train them? Do you have a scheduled, structured, formal new-caller training program? Do you use a professional training manual that you have written and designed specifically for your operation? A manual that meets this definition will include a clear and well-defined personnel policy. It should include a detailed explanation of what you expect of your callers in the areas of attendance, attitude, performance expectations for pledges, credit card gifts, average shift revenue, required weekly hours, "do's and don'ts," etc. Your policy also should include a description of your disciplinary procedures, including the circumstances under which callers will be terminated from their positions. Employees need to know what actions will be taken if they fail to meet requirements, and what you will do to help them correct problem areas.

**Accountability.** The best policies in the world are irrelevant if they aren't enforced. Do you and your student supervisors consistently and promptly assure that callers adhere to performance requirements? While the bulk of our callers are young people, they are not children. They are on the verge of becoming independent adults, and we should treat them as such. Give them your respect to gain their respect. If you treat your employees like children, less than professional behavior should come as no surprise. Being a caller is not a job for everyone. When you carry individual employees who don't pull their own weight, you risk sending the message that you

# Matching Gift Efforts within Your Direct Mail Program

The three tenets of a good annual giving program are to increase dollars and donors, educate internal and external constituents, and identify special and major gift prospects. Increasing matching gift participation is firmly rooted within the tenet of education.

As annual giving professionals, we all understand that matching gifts come down to donor awareness and a little additional effort on their end. There are a number of inexpensive (if done strategically) initiatives that will enhance matching gift comprehension and donor effort to fulfill gift potential.

**Educational Postcard:** This strategy can work well to jumpstart matching gift awareness. The direct mail piece is a simple postcard, not seeking a gift, but rather utilized as a "Did You Know" primer. Mail this postcard utilizing 3rd class postage rates at the beginning of the fiscal year every other year, prior to your annual giving cycle. Utilize a unique marketing design for the front of the postcard to catch the prospect's attention. A sample from Virginia Tech is noted below.



The back-side would then have a message similar to:

Do You Know?
Many employers will match gifts to higher education given by employees and spouses, even if they are retired.

When contacted by (Institution Name Here) Annual Giving program in the coming year, simply check with your personnel office to obtain the necessary form, complete it, and send in along with your gift or pledge payment to double or triple your gift to (Institution Name Here).

For more information and to see if your company matches, visit (Institution Website Here). Thank you for supporting (Institution Name Here)!

The good news for this approach is that it is fun, inexpensive, and creates awareness. The bad news is that there really is no quantifiable means to determine a direct correlation to impact. Contact AFI at afi@annualfundinc.com if you are interested in having an awareness piece designed and printed.

**Matching Gift Brochures:** An old standard, I know, but still very useful and an inexpensive method if utilized strategically. The key is to whom the brochure is mailed to and then to focus on production options to lower the cost per piece as much as possible.

As a general rule, only include the full-length brochure listing majority of major matching gift companies in direct mail appeals to recent donors of the last five years. Direct mail return rates on longer lapsed donors and non-donors are so low that the cost of including a brochure to these audiences is not a wise investment.

A key area to focus upon is the production cost per piece. No matter the vendor chosen for the paper matching gift awareness pieces, there is a major caveat to keep in mind. In both situations, you are provided the option to purchase the re-print rights (data) or purchase pre-printed brochure materials with the data in place with a generic cover. In most cases, you will be better off from a cost per piece standpoint purchasing the re-print rights, designing an institution specific cover, and printing on your own. Savings aside, it will be much more to your institution's advantage to utilize the institution brand in the actual brochure. AFI is partnering with HEP Development in the providing of print materials in support of your matching gift areas. Check out HYPERLINK "http://www.annualfundinc.com" www.annualfundinc.com for the lowest prices available.

**PS Mention:** A P.S. should be used in most letters as it provides an opportunity to stress an important point and

"Education and awareness are keys to success"

# Telefund Coaching Sheet

Caller: _____  Date: _____

Supervisor: _____  Monitored By: _____

**1 = Unsatisfactory**
**2 = Below Average**
**3 = Average**
**4 = Satisfactory**
**5 = Excellent**

**Introduction:**

Enthusiasm ...........................................................................................................................1 2 3 4 5

Self Identification ...................................................................................................................1 2 3 4 5

Checks Mailing Address.........................................................................................................1 2 3 4 5

Checks Business Information .................................................................................................1 2 3 4 5

Updates Spouse information ..................................................................................................1 2 3 4 5

Updates Netletter...................................................................................................................1 2 3 4 5

**Rapport:**

Conversational .......................................................................................................................1 2 3 4 5

Reacts to prospect cues.........................................................................................................1 2 3 4 5

Caller Comfort level ...............................................................................................................1 2 3 4 5

**Transition:**

Appropriate Phrases..............................................................................................................1 2 3 4 5

Properly Describes Fund .......................................................................................................1 2 3 4 5

**Asks:**

Uses Levels ...........................................................................................................................1 2 3 4 5

Ask Strength ..........................................................................................................................1 2 3 4 5

Handles Objections ...............................................................................................................1 2 3 4 5

Vote of Confidence ................................................................................................................1 2 3 4 5

Credit Card Ask .....................................................................................................................1 2 3 4 5

**Closing:**

Thanks Prospect ....................................................................................................................1 2 3 4 5

Asks for Matching ..................................................................................................................1 2 3 4 5

Polite when given refusal .......................................................................................................1 2 3 4 5

**Overall:**

Positive, friendly and polite throughout .................................................................................1 2 3 4 5

Does not sound scripted ........................................................................................................1 2 3 4 5

Call 1 Comments: _____

Call 2 Comments: _____

Caller Signature: _____  Supervisor Signature: _____

# Direct Mail Quick Fixes

While mass direct mail generally performs well there are a number of enhancements that can be made to give your results a bump. If you are able to implement the items below you will see an increase in results. The challenge is to camouflage the mass mailing so it appears as personalized as possible.

**Get rid of the window envelopes.** It is cost effective, but not results effective. It screams bill. Have prospect names ink or laser jetted onto the envelope. There is an added cost as the mail house must match envelopes with names, but it is well worth it. Your appeal can not look like a bill or mass mail.

**Use live stamps.** The additional cost is minimal and it personalizes the mailing. There are third class postage non-profit stamps available. Using of an indicia screams mass produced.

**Personalize the salutation.** "Dear Mr. Smith," rather than "Dear Supporter," is preferred. Generic salutations or no salutation at all says mass mailing.

**Provide Better Content.** The content really needs to build a case of support and not be too general. Give specific initiatives and philanthropy impact. Excite the reader compelling them to action.

**Detach the attached gift cards.** Again, traditionally this approach is a great money saver, but it too screams mass mailing. Pledge cards can be printed 3-up/2-per on an 8.5" x 11" sheet with alumni information placed on the cards. The mail house would separate the cards after laser printing and it becomes a three-way match with the personalized envelope, personalized letter, and personalized gift card.

**Personalize Ask amounts.** Work for the upgrade in your direct mail (see article in issue 2) rather than letting them off the hook by checking the lowest denomination box. You may run into some additional cost, but it will be worth it to develop a standard formula based upon previous gift that makes the gift amount choices 200%, 150%, 110% and other. This will increase your direct mail average gift.

**Better Marketing Techniques.** Create better visuals. Again, a little more costly, but well worth the investment. Mailings should be themed, colorful, and have pictures of students as compared to standard letterhead stationary. Annual giving is about marketing. Your letter design and copy must awaken the warm fuzzies in alumni. Their educational experience was a fun, learning, growing environment. Alumni give due to nostalgia and gratitude. Looking at plain text does not awaken it.
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"...camouflage the mass
mailing so it appears
as personalized
as possible."

# Staff Retention a Good Indicator of Program Quality

don't expect much from your staff. Also, if this is a student's first real job, failing to hold them accountable sends the message that you don't really expect them to apply themselves and that "just getting by" is an acceptable performance standard. In other words, be a manager (manage is an active verb). Provide your staffs with clear performance expectations and hold them accountable. If they can't do it on their own, teach them how. Recognize individual strengths, as well as weaknesses, and provide opportunities for growth beyond the phone center. People like to succeed. Create an environment where your commitment to the success of your calling staff is obvious.

**Motivation.** Once callers complete their formal new-hire training, what do you do to further develop their skills? How do you address a caller who isn't developing at the pace you expect? What ongoing activities does your program have in place to motivate your callers? Too often in this area of our work, we hear things like, "they're students – just feed them and they're happy." It takes more than food to keep people motivated. A "one-size-fits-all" approach is necessary for general performance expectations, quotas and attendance requirements, but not for how much motivation, positive/negative reinforcement, recognition or one-on-one time that any individual caller will need to achieve their potential. How creative are your supervisors at managing their callers? How creative are you? Managers and supervisors need to be fair and be consistent, but they must realize that each caller should be managed as an individual, to a greater or lesser extent. If you're a leader, lead. People who aren't leading generally look to others to fill that role in their lives. In the end, your staffs do their jobs for you – how well or how poorly depends on the dynamic of the relationships that you create with them.

**Morale.** How is the morale in your office? This starts with the messages that you send about how you feel about your work and your organization. (Not surprisingly, phone center morale is often the best in the division.) Are you and your staff consistently positive? Do you like your job? Do you enjoy working with students? How much administrative support does your phone center receive? Beyond their paychecks, students work for you, and the individuals who are their direct supervisors. Low turnover/high retention is a direct result of how well a program is structured, and – most importantly – the quality and commitment of the direct, frontline phone center management staff, be they full-time managers or part-time student supervisors.

What is the quality of the relationships that you have with your callers? Have you effectively established a balance between the professional, authoritative work relationship, and the more supportive, friendly connection that you likely have with your staff? Are you sincere? When callers bring their problems to you, are you really

concerned? Are you willing to do whatever you can to help them? Always have time for your callers and always be real. If you plan to build rapport with your staff by establishing a manager/mentor/friend relationship with them, be prepared to step up. (For instance, when Lisa/Roger comes to you before a shift, closes your office door, and starts to tell you how depressed they are, and how they're thinking about dropping out of school, deal with it – don't blow it off by saying, "Oh, wow, I'm sorry – I wish I could help. Hang in there.") Talk to them. Listen to them. And, if you can, help them. People choose to remain in environments where they feel comfortable and appreciated. Create an environment that is rooted in mutual respect by understanding that, without the callers, there'd be no reason for any of us to come to work.

**Conclusion.** Rest assured that all programs go through periods where retention is a challenge, and that it something you can improve – but real improvements in this area rarely result from quick fixes. It's a lot to think about, and this just scratches the surface, in all honesty. Depending on the extent of the problem, it may require some real soul searching to come up with the right answers. This is where our work gets very challenging, but equally rewarding.

<sup></sup> *Albert D. Melfo, 2004*

**AFI**

# The Major Gift Prospect/ Donor Annual Fund Relationship

A donor makes a gift to your institution for many years and then one day they are tagged a major gift prospect. What happens? In many institutions the practice is to move these new major gift prospects and be essentially "parked" by development officers and excluded from the annual fund appeal. This is not sound philanthropy practice and sends a mixed message to your most loyal annual fund prospects and donors. There are only two (2) instances where a major prospect/donor should be excluded from an annual fund appeal:

1. If the prospect/donor requests to be excluded

2. If the prospect/donor is under active solicitation by a major gift officer

The assumption cannot be made that because a few individuals request not to be contacted that all do not want to be contacted. Chances are, if your major prospects/donors giving histories are reviewed, one will find many annual fund gifts, gifts that cease once they were parked due to making a major gift commitment. Key assumptions that can be made about major gift prospects/donors:

- They are long time annual fund donors

- They enjoy talking to students via the Telefund

- They give because of the students

They will not use an annual gift as an excuse not to make a major gift, if they do; they are not a major gift prospect anyway!

It is recommended that Annual Giving:

- Track and monitor number of prospects/donors "parked" by development officers

- Educate on need for annual fund gift as well as major gift, securing both!

- Produce annual giving "leave-behind" brochure piece for major gift officers that includes a response device and response code to track team players

- Continue/establish exclusion code schematic

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# Matching Gift Efforts within Your Direct Mail Program

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studies show that the P.S. is often the one part of the letter read and remembered the most. A statement such as, "Double or triple the impact of your gift at no additional cost. Please check with your employer to see if your gift can be matched through a company matching gift program," can serve as a nice matching gift reminder.

**Importance of MG Blurbs:** Again focusing on education, draft sample language that your internal constituents can place on their websites and within their newsletters. This is particularly important for business, engineering, and science constituent groups. Sample advertising language:

**Free Money  Yours for the Asking!** (Institution Name) receives over $1 million each year in "free money" due to company matching gifts, thanks to donors who request the form from their participating employer and send it to (Institution Name) with their gift. (Institution Name) takes it from there and follows up with the company to receive the "match."

Matching Gifts are an easy way to double or even triple your

gift to (Institution Name)! Check with your employer today to see if your employer will match your gift to (Institution Name) or visit our online lookup site: www.matchinggifts.com/schoolname

**Reminder Mailings:** This should be a monthly occurrence. Work with your Information Technology staff to develop a standard program that identifies those donors that have recently made a gift, are coded as working for a matching gift company, and did NOT submit a matching gift form with their gift. The data elements you will want pulled include: name, address, gift date, gift amount, gift designation, matching gift company, and ratio. Draft a letter template that acknowledges/notes appreciation of gift, notes indication of company employer, and potential match ratio. The donor will either: 1) send in matching gift form; 2) disregard notice; or 3) note that company doesn't match any longer, or no longer employed by company. Let's hope for #1.

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# Fund Raising for Independent Schools

*Continued from page 3*

- Annual giving and special events giving (auctions, raffles, etc.) using the Parents Association as a vehicle typically utilizes one or two parents from each grade level in a team-oriented fashion, the lead-parents committing their gifts first as they are recruited, then calling on all of their counterparts, the goal being 100 percent participation, and some "prizes" for each class that hits that target.

- Special projects fund-raising by booster clubs and parent associations should be carefully coordinated through the development office so as not to conflict with the timing and emphases of other fund-raising priorities: booster clubs/PTA fund-raisers such as market days, hot lunch program, book fairs, subscription drives, grocery store script sales, etc. have several purposes, such as:

1. providing additional services to school families that the school itself cannot provide.

2. funding off-budget items: the faculty "wish-list" and additional funding for enrichment opportunities for classrooms and program.

3. "friend-raising" : involving parent volunteers in making contributions to the community.

- From the beginning, even perhaps at the admissions stage, prospective parents should be informed that annual giving is an expectation of the school, since tuition does not cover the expenses of educating the child.

6. Join CASE, the Council for the Advancement and Support of Education:

Schools fund-raising and development office expertise grow in relationship to the professional growth of those responsible for the outreach. The professional organization for independent school fund-raising is CASE: For publications, workshops, and/or membership information, contact CASE at www.case.org.

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