

ISACS Workshop

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**A TEAM APPROACH IN DEVELOPMENT: THE
CRITICAL ROLE OF A HEAD OF SCHOOL**

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BACKGROUND

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GRENZEBACH GLIER AND ASSOCIATES

- National and international firm that has successfully served non-profit clients for 50-plus years—Note CASE “Currents” back cover
- Client fundraising and campaign goals range from \$5 million to \$6 billion
- A commitment to evidence-based strategies and a team approach to client projects
- Experience with over 150 independent schools, including day and boarding schools, faith-based and secular, and single-sex as well as co-educational schools from pre-K through 12th grade, across North America, the UK, and the globe.

OUTLINE OF SESSION

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GOAL AND OUTLINE

Goal – We want you to consider ways you might strengthen the leadership team for the pursuit of major gifts for your school. We will explore roles that each leader might play in this work. We will share stories from experience and from each other to build our understanding of attitudes we might adopt and steps we might take to increase success at our schools.

- Context—Major Gifts Fundamentals
- The Leadership Team and Major Gifts
- A Case Study of Teamwork Over Time
- Experiences at Your School

LEARNING OBJECTIVES

- What do you hope to learn?

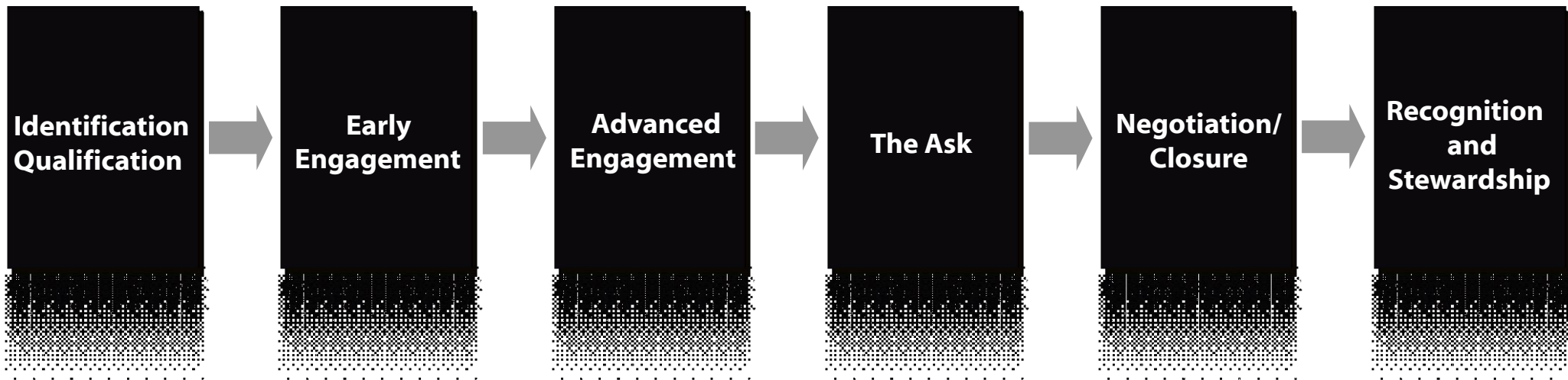
**CONTEXT: MAJOR GIFTS
FUNDAMENTALS**

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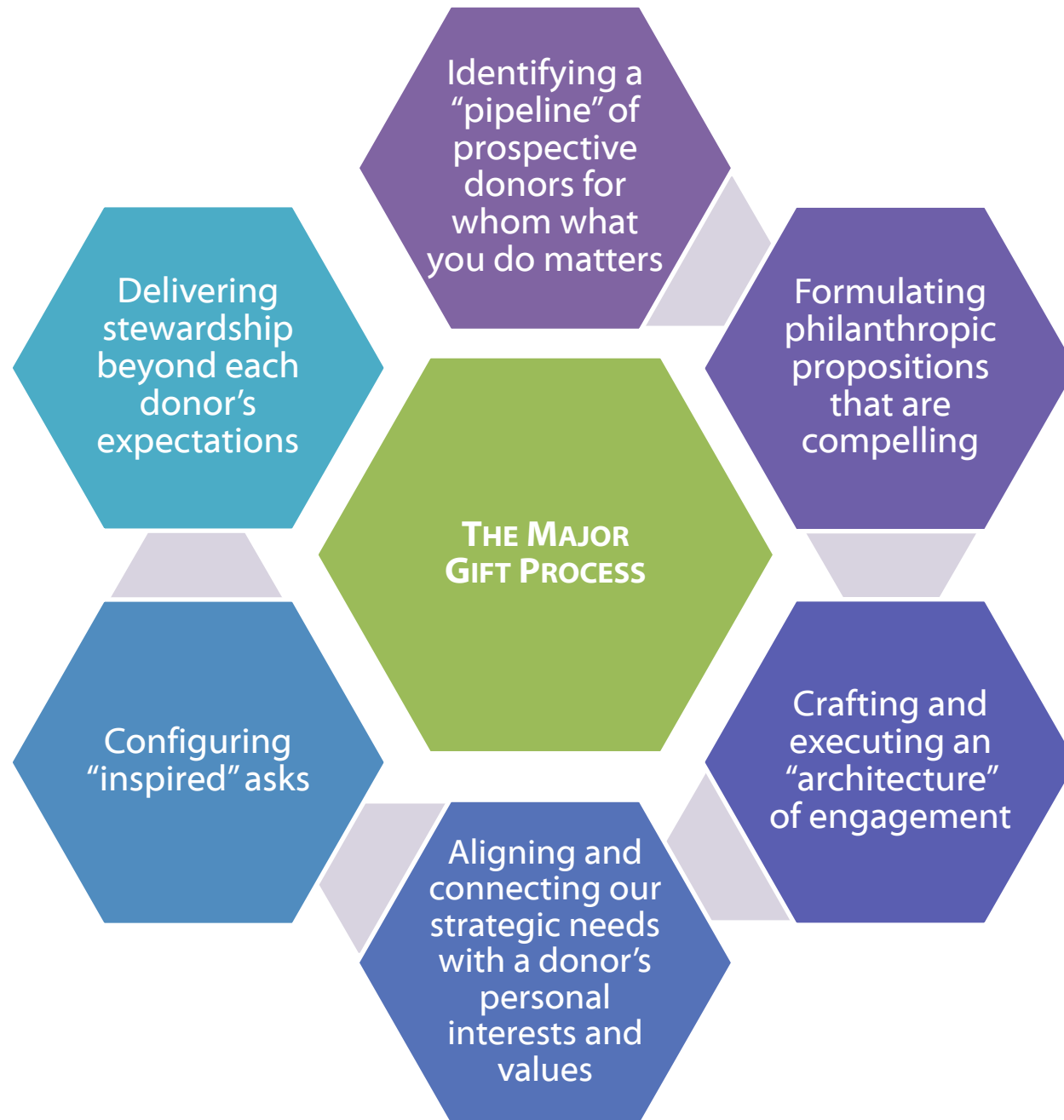
WHAT IS A MAJOR GIFT?

- Major gifts are large, episodic commitments:
 - Usually made from assets
 - Sometimes including a blend of outright and planned gifts
- At many of our schools, a “major” gift is defined as a commitment of at least \$25,000, \$50,000, or \$100,000, usually payable over no more than 5 years.
- While there is a role for gifts of all sizes, major gifts fundraising focuses solely on prospects capable of making major gifts and who show an inclination to do so at your school.

THE SEQUENTIAL PROCESS OF MAJOR GIFT SOLICITATION



SIX CRITICAL FACTORS THAT DRIVE THE MAJOR GIFT PROCESS



CORE ASSUMPTIONS ABOUT THE MAJOR GIFT PROCESS

The single most frequent reason cited for making a gift (at any level) is, "I was asked"



People give to a cause or a program in which they have a stake in the success; they want to make a difference and have a discernible impact



Donors are much more strongly motivated by the quality and success of an institution and often far less by its distress or financial need



Significant gifts are often seen by donors as "investments;" they want to be able to see the return on their investment, and if satisfied, they'll invest more

CORE ASSUMPTIONS ABOUT THE MAJOR GIFT PROCESS

People do give to people they like and trust; **relationships over time are often the most critical driver in any gift decision**



Significant donors (investors) respond to strong institutional leadership and shape their own giving as they observe the “exemplar” or leadership giving of others



Donor interest grows and shifts in response to our proactive efforts to communicate institutional strategy and “mission-critical” priorities



Over time, an institution’s **best and most loyal donors will often give to multiple purposes and areas and across many different priorities**



Demonstrable engagement and philanthropy from governance and volunteer leadership dramatically enhances private support capacity

THE LEADERSHIP TEAM AND MAJOR GIFTS

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WHO ARE THE LEADERS?

- Head of School
- Chief Advancement Officer
- Chair of Board
- Sometimes designated development leader
- Campaign chair and committee

ROLE OF THE HEAD OF SCHOOL

- Vision
- School's voice and lead communicator
- Key relationship builder with top prospects
- Oversee hiring and evaluation of advancement leader
- Work with board chair to advance strategic planning, project planning and campaign planning
- Participate in developing donor strategies
- Conduct donor cultivation and solicitations
- Lead in key stewardship activities
- Laser-like focus on top prospects
- Devote necessary time
- Other?

VIEWS FROM THE DONOR ABOUT THE HEAD OF SCHOOL

- Interviews
- Spotlight
- Praise and blame
- Donors want insight
- Some want connection
- Other insights?

ROLE OF CHIEF ADVANCEMENT OFFICER

- “Drive the bus”
- Oversee process of donor identification
- Establish relationships based on confidence and trust with head of school and board leaders
- Share data, progress for accountability
- Claim head’s time and use wisely
- Keep head’s focus on top prospects
- Organize and conduct donor strategy sessions with head and board leaders
- Other?

ROLE OF BOARD CHAIR

- Oversee and promote thoughtful planning process—engagement, clarity, good listening
- Strategic planning, project planning, financial planning, campaign planning
- Support head of school in vision
- Enlist key board leaders in advancement work
- Promote importance of board leadership in giving—annual, campaign, planned
- Participate in donor strategy sessions
- Solicit
- Others?

KEY ELEMENTS OF WORKING TOGETHER EFFECTIVELY

- Communication
- Time
- Understanding each person's strengths and areas of challenge
- Knowing when to bring in others
- Urgency, deadlines
- Donor-centric
- Optimism
- Nimble
- Others?

CHALLENGES AND SUCCESSES

- How have you assessed your own strengths and challenges?
- How have you adapted with you team and situation?
- How have you sought to grow?
- How have you used your peer network for counsel?
- What situations have been most difficult to navigate?
- What successes have come from teamwork?

A CASE STUDY IN TEAMWORK

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BARBARA DODD ANDERSON—GEORGE SCHOOL '50

- 2007 gift of \$128 million—lead trust over 20 years
- Many aspects of story but focus today on roles of heads, advancement leaders and board chairs in relationship over 20 years
- Principles apply to all major gifts
- Google for other details
- Quick summary
 - How Barbara came to George School
 - Many gifts
 - Warren Buffett connection to her father
 - Source of wealth



HISTORY OF MAJOR GIFTS

- 1991 \$500,000 for teaching chair
- 1995 \$4 million for scholarship program
- 2001 Informed school of large bequest intention
- 2007 \$128 million lead trust unrestricted
- 2011 Bequest of \$30 million
- Annual gifts every year

CONTINUITY AND CHANGE OVER 20 YEARS

- Two Heads of School
- Two Board Chairs
- Four Directors of Advancement

ROLE OF HEAD OF SCHOOL

- #1
 - Solicited first gift
 - Created teaching chair program
 - Created scholarship program
 - Visited occasionally
 - Hosted on campus
 - Phone and note communication

- #2
 - Stewardship on campus and in CA
 - Participation in gift discussions
 - Leading voice in media and on campus celebrations

ROLE OF DIRECTOR OF ADVANCEMENT

- #1
 - Solicitation with head of faculty chair
 - Stewardship program
- #2
 - Frequent visits (3-4 times a year)
 - Stewardship for scholarships
 - Worked with financial advisor on scholarship gift
 - Phone calls, notes

DIRECTOR OF ADVANCEMENT (CONT.)

- #3

- Suggested and worked with financial advisor on lead trust
- Supervised publicity of gift
- Frequent visits and communication

- #4

- Planned and executed major on-campus event for library naming
- Communications

HEADS OF BOARD

- #1
 - Hosted on campus celebration of gift for scholarships
 - Approved uses of funds through board

- #2
 - Celebration visit to CA with head of school and director of advancement
 - Guided board in policy about uses of funds
 - Hosted on campus event

THE RESULT

According to Dodd Anderson, "This gift is meant to honor not only my father, David Dodd, and his legacy, but also all of the teachers at George School who had such an impact on me and are so important to their students today. I want to help George School because of the excellence of its faculty and because it is a school without pretensions, where caring for and learning from each other are as important as academic success."

LESSONS IN TEAMWORK

- Can be applied to many situations
- Having a plan
- Being donor-centric—motivation, values, family circumstances
- Being nimble—adjusting to changing circumstances with the donor and in the world
- Devoting time

EXPERIENCES AT YOUR SCHOOLS

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WISDOM OF THE GROUP

- Confidentiality
- What have been your challenges in building an effective leadership team in pursuit of major gifts?
 - Skills and experience of team members?
 - Lack of leadership from board?
 - Turnover?
 - Other?
- What are three things you can reflect on today and take back to your school for discussion or implementation in next month?
- What is one thing you can do differently as head of school that will make your team more effective?

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