

# Sample Operations Plan For Independent Schools

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## Multi-Year Goals

1. Enhance the stewardship program for both donors and volunteers.
2. Increase Alumni engagement in the life of the School (with special attention on alumni giving and event participation).
3. Plan and execute a 2-3 year Capital Campaign.
  - Utilize the Board of Trustees as volunteer fundraisers
  - Grow the donor pool and add front-line fundraisers
4. Explore alternative methods to increase revenue.
5. Embrace and celebrate philanthropy at the School.

## Annual Fund

### Objectives

- To maintain a strong Annual Giving program through active recruitment of volunteers, better use of the Development Committee, and more targeted cultivation of major donors.
- To cultivate top donors and prospects through personal visits.
- To educate all constituencies about ways to give to the School and the importance of Annual Giving.

### Key performance indicators

- Total budgeted goal - \$xx
- Parent goal - \$xx
- Alumni goal - \$xx
- Parent participation – xx%
- Alumni participation – xx%

### Additional Key Performance Indicators

- Number of Visits by Annual Giving Staff
- Number of online gifts
- Number of matching gifts
- Number of increased gifts
- Number of active parent volunteers (AF chairs, Parents Association, etc.)
- Dollars raised by Development Committee
- Dollars raised by parent volunteers
- Year-to-year change in giving by parents

## **Goal 1: Cultivate major donors to the Annual Fund throughout the year.**

### **Strategies**

1. Continue with cultivation events to offer an opportunity to thank the leadership donors and the solicitors for their commitment to the Annual Fund as well as help them see the bigger picture—how the Annual Fund helps the School’s operating budget meet its goal.
2. Continue having the Head of School personally sign acknowledgement letters.
3. Consider having the Director of Development send a personal thank you note to alumni major donors.
4. Continue to identify potential grandparent donors.
5. Never stop thanking the donors and thank them often. Thank donors that give \$XX or more with a handwritten note from the Annual Fund Chairs in the spring.

## **Goal 2: Become more aggressive in increasing participation and gift amounts—particularly current Trustees, parents and alumni.**

### **Strategies**

1. For the 20XX-XX year, look to increase leadership gift level from \$XX to \$XX. Increasing the gift level will help to ensure the strength of the Annual Fund as the School embarks on an alumni participation challenge.
2. Conduct a rating session for the Annual Fund, involving the Staff, the Development Committee and/or select Trustees in the process where specific ask amounts, cultivation plans, and solicitor assignments are developed for everyone in and above the \$XX Member level.

## **Goal 3: Increase volunteer involvement in the Annual Giving program.**

### **Strategies**

1. Assure that volunteer training is effective, well-conceived, and uses volunteers’ time wisely.
2. Keep volunteers and solicitors “in the know” with financial updates and status reports.
3. Invite alumni participation—introduce a “thank-a-thon” program for alumni donors.
4. At parent community events take the time to explain what the Annual Fund is; its significance and importance to the School; how parents can get involved.

### **New Ideas for the New Year**

Family of funds or “buckets” for the Annual Fund. With the support of the Development Committee, give donors choices as to where they may direct their support: academics, arts, athletics, financial aid, and area of greatest need.

## Alumni Relations

### Objectives

- To encourage alumni to participate in developing and maintaining alumni programs while acknowledging alumni commitment to the School.
- To promote interaction between alumni and current students and faculty creating avenues for their participation in School life while maintaining alumni connections to each other.
- To acknowledge the importance of alumni to the School's past, present, and future.

### Key Performance Indicators

- Surpassing alumni giving goal of \$XX
- Number of reunion donors
- Number of visits
- Exceeding Alumni Participation of XX%
- Number of alumni volunteers recruited
- Number of alumni visited that give to the annual fund

**Goal 1: Maintain current successful alumni programs; consider new alumni programs that connect alumni with the School.**

### Strategies

1. Integrate alumni into programs and events already established at the School;
2. Promote alumni programs to the School community;
3. Expand regional programming initiatives;
4. Develop young alumni programming including programming for students in high school, college, and post-college.

**Goal 2: Communicate with alumni to keep them informed and involved with SCHOOL.**

### Strategies

1. Regularly update alumni snail and email addresses;
2. Establish Class Correspondents system by recruiting representatives and giving them specific responsibilities, i.e. increased alumni participation in the Annual Fund. Help them set expectations and financial goals to achieve; coordinate solicitation efforts with phone calls and signing letters. Keep it simple and help to grow the program.
3. Establish regular and meaningful communication from the School to the Alumni Board.

### **Goal 3: Foster the common interests of the Alumni Association and the School.**

#### **Strategies**

1. Reach out to and engage the greater alumni community in the life of the School by vehicles such as Reunion Weekend.
2. Examine the process by which a young alum is selected to serve on the Board of Trustees and the Alumni Board.
3. Continue to cultivate an Alumni Board which is representative of the alumni constituency.
4. Consider utilizing volunteer time to help organize the School's historical information;
5. Lead the Alumni Association through a strategic planning process.
6. Establish meaningful connections between current students and alumni.

### **Goal 4: Continue outreach to Alumni to increase recognition/awareness of their importance to the School: past, present, future.**

#### **Strategies:**

1. Organize and sponsor several special events for alumni, namely: wine tasting, reunion, regional gatherings, career day, senior send-off, 8th grade tea, and parents of alumni party.
2. Design a reunion giving plan which includes dollar and percentage goals for each five-year reunion class. Within two years, set an Annual Fund goal of 100% participation for each reunion class and add a competitive aspect to it.
3. Consider a student run phone-a-thon. This helps to build cultivation, educate the alumni community and encourage financial participation within the SCHOOL community — while providing students information about philanthropy beyond graduation.

#### **New Ideas for the New Year**

Introduce a networking night for all alumni, which will be an opportunity for alumni of all ages to engage with one another in a downtown setting and to learn more about others in their industry. Other objectives include:

- Generating leads in your industry
- Growing/promoting your business
- Meeting like-minded professionals
- Finding opportunities to mentor or be mentored
- Discovering other alumni in the city
- Honing networking and presentation skills

## **Cultivation and Stewardship**

### **Objective**

To recognize, acknowledge, and thank those who have given the School their time and/or financial resources.

### **Goal 1: Thank, in a personal way, all of those who contribute time and resources to SCHOOL.**

#### **Strategies**

1. Develop an acknowledgement plan, specifically designed to more personally thank current parent donors who give more than \$2,500 to the Annual Fund and alumni who give more than \$500 to the Annual Fund.
2. Thank volunteers as well—determine whether or not an event for thanking all volunteers is appropriate and would be effective.

### **Goal 2: Continue to inform the full constituency through various School publications.**

#### **Strategies**

1. Consider a Development article for the winter or spring edition of the magazine.
2. Consider sending an occasional VIP letter from the Head of School to all donors in the leadership circles.

### **Goal 3: Determine stewardship events that should happen annually.**

#### **Strategies**

1. Review status and effectiveness of current events.
2. Consider adding new events, including: former trustee luncheon, and a planned giving society event.

### **Goal 4: Continually review and discuss program; evaluate new ideas and best practices.**

#### **Strategies**

1. Discuss in staff meetings; review program and new ideas.
2. Where appropriate, invite major donors to teach a class or meet with students, according to their professional interests or personal avocation.

### **New Idea for the New Year**

Look at a better stewardship plan for current parents by getting help from key people on the PA board to identify good Parent volunteers in different areas (athletics, arts, etc.) to help fill the ranks for future leaders of the AF.

## Database Management

### Objectives

- To maintain a clean, updated database containing all available constituent information for accurate and timely reports, receipts, and execute acknowledgement process.
- All database changes directed to the Donor Records Manager for consistency.

### Key Performance Indicators

- Creation and distribution of standard monthly and other fundraising reports to the Development team, Head of School, and volunteer leadership as needed.
- Successful gift reporting of and crediting to foundations and the donors connected to these charitable giving vehicles.
- There will be no philanthropy-associated red flags in annual SCHOOL audit.
- # of corrected records.

### Goal 1: To maintain the database and all applications.

#### Strategies

- Maintain good relations with Business Office.
- Donor Records Manager to work with Development team to review/familiarize herself with the types of reports most applicable/pertinent to the tasks at hand.
- Development team to review database protocol and areas of improvement.

### Goal 2: To further refine gift recording and thank you processes.

#### Strategies

- Create a protocol sheet for all involved in the process.
- Advise the Director of Development when a major gift has been received from an alum and have them (or the Director of Alumni Relations) send the donor a personal note.

### Goal 3: To continue database cleanup as time allows.

#### Strategies

- No Valid Address cleanup
- Alumni Addressee cleanup
- Deceased cleanup
- Do Not Mail cleanup
- Inactive cleanup

### New Ideas for the New Year

- Establish donor profile reports for department to use in their solicitation of donors.
- Have the next fiscal year's acknowledgement letters done in advance of the new fiscal year.

## Major and Planned Gifts

### Objective

Create a comprehensive, donor-centric Major and Planned Giving Program for SCHOOL

### Key Performance Indicators

- Number of visits by Director of Development/Major Gifts
- Number of visits by Director of Annual Giving
- Number of attendees at leadership giving events
- Number of increased gifts by the attendees of leadership events

**Goal 1: Craft a long-term major and planned gift fundraising plan focused on converting annual fund donors to major and planned donors, stewarding significant SCHOOL philanthropy, and building deeper relationships with parents and alumni.**

### Strategies

1. Cultivate, solicit, and steward top donors and prospects through personal visits.
2. Create a data-driven donor prospect pipeline that generates appropriate prospect research as well as regular reports tracking and analyzing progress.
3. Implement a moves management system to strategically move donors through the major gift cycle.
4. Review the pipeline periodically with DOD, HOS and Development Committee (include Finance Committee as needed).

**Goal 2: Evaluate current Planned Giving program and determine best next steps with the goal of increasing planned giving society membership.**

### Strategies:

1. Meet face-to-face with current planned giving society members with emphasis on those who live locally.
2. Promote the planned giving program through articles and profiles—consider a planned giving newsletter and outsourcing the newsletter production.
3. Continue to include Planned Giving Society members in School activities and events.
4. Educate the Development Committee, Annual Fund volunteers, and major gift solicitors on basic planned giving principles to be used during solicitations, especially during a capital campaign. Extend education to the full Board of Trustees when appropriate.

## Special Events

### Objectives

- To highlight the Head of School, faculty, students, and programs throughout SCHOOL.
- To plan events purposefully in order to ensure good attendance, highlight the accomplishments of the School, and best use the time of the Head of School and Development staff.
- To celebrate philanthropy, donors, and the impact on SCHOOL.

### Goal 1: Examine the success and effectiveness of events at reaching their goals.

#### Strategies

1. If a fundraiser, establish whether the event is making ample revenue.
2. If a friendraiser, establish whether the time and effort of the Development Office and volunteers is equal to the value of the event.

### Goal 2: Examine the Development Office relationship with the Parents Association.

#### Strategies

- Are there ways to hand off some responsibility to the Parents Association and volunteers?
- Define roles of the Development team and consider presenting them to the Parents Association President and/or Executive Committee.

#### New Ideas for the New Year

- Have a once a month Lunch & Learn taught each month by a different member of the Development team. Each member would teach the team about what they do for cross training purposes, or something they learned (at a conference or course) that would be helpful to others. It would have to be a scheduled lunch that all are required to attend. That way, the presenter would not be left with a small group.
- Expand parent outreach to a micro-stewardship level, and use summer volunteers to engage incoming families in a new way.
- Include philanthropy education in the curriculum, as part of an existing course or as a stand-alone effort (through advisory, select morning meetings, etc.). Educate students about the importance of philanthropy at a local, national and global level; the concept of philanthropy as part of global citizenship; and the various ways philanthropy can take place. This will help build a strong base of future supporters.