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# FIVE FUNDRAISING PRINCIPLES FOR INDEPENDENT SCHOOLS

By Joe Garecht, Founder, The Fundraising Authority

Getting by and surviving isn't enough. If you want your school to thrive, you need to build a strong fundraising and development network that allows you to focus less on your bank balance and more on your mission, programs, and ultimately, your students.

Here are five key fundraising principles that you'll need to inculcate into your school's development culture in order to thrive:

## Principle #1: Fundraising Isn't Evil

Effective retention strategies start as soon as the membership is purchased. Renewal isn't an option without an individual becoming a member in the first place. Making the membership purchase process a positive experience is the first step toward renewal. Here are three things you can do at the time of membership purchase to improve your chances of renewal:

You'd be surprised how many people, including those who fundraise for a living, need to hear this... fundraising isn't evil! It's not bad; it's not dirty; it's not slimy or beneath you. Sure, most folks don't think school fundraising is literally evil, but I can't tell you how many principals, board members, and school development officers have told me they feel "icky" about making an ask.

Here's the thing: What your school does matters. It's as simple as that. Take a moment to think about your organization's mission...what it is it that you do? What kind of difference are you making in the lives of the young people you educate, and what impact will that education have on the world? Your work matters!

If your mission matters, then your fundraising matters. You wouldn't be able to serve the children and families in your community or do the work that you do without fundraising.

Think about what you would be able to do at your school if you were able to raise more money. You could offer more and better programs, increase the salaries of your staff, offer more scholarships, and do more good for your community. When it is put that way, doesn't it sound like fundraising is extremely important?

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If you ask a parent, alum, or supporter for a gift and the response is “no,” you shouldn’t feel icky or smarmy. You should feel good about yourself and your school because you tried to raise money to change lives. Sure, you can go back and look at your cultivation process to see if it was lacking somewhere, but you should never, ever feel bad about fundraising.

How does your team feel about raising money? Maybe it’s time to have a talk with your board and staff members about the importance and *goodness* of fundraising.

## Principle #2: Plans Matter

Most schools get started on a dream, but without a plan. The founding board members and staff pull together and will the school into existence, raising whatever is needed to start the school through personal connections and maybe a small fundraising event. The organization gets off the ground and low and behold, the fundraising activities continue, without much of a plan.

As the school grows, some plans get sketched out (usually revolving around when to hold events or send out letters), but they are done piecemeal and often without much thought about a comprehensive strategy. Occasionally, if the school gets big enough and raises enough money, it will take the time to write out a full, comprehensive fundraising plan (sometimes using paid consultants), and then will bind up the plan, put it on the shelf, and leave it there without looking at it again for another 5 to 10 years, until someone on the board says, “What’s our fundraising plan again?”

The process outlined above is a mistake. Having a good plan matters to your fundraising efforts. A plan provides a guide your efforts, makes sure everyone is on the same page, defines which activities you will carry out and which you will avoid, and provides a reference point in the heat of battle, allowing you to look at the overall strategy in the midst of daily activities and issues.



**A GOOD FUNDRAISING PLAN:**

- 1. ...is written down.**  
Fundraising plans that exist only in the mind of the development director or board chair are apt to fail.
- 2. ...is constantly evolving.**  
Don't write a plan and expect it to last for the next two decades. You will need to take your fundraising plan out and look at it and tinker with it on a regular basis. Things change. So should your plan.

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### **3. ...clearly defines goals and deadlines.**

A plan that simply says, "We will send out direct mail pieces twice per year" is a recipe for failure. It's far better to say, "We will send out a direct mail piece the third week of February and the third week of September this year. The development director will be responsible for writing the copy and developing the lists, and our print shop will handle design, printing, and mailing."

Does your school have a written fundraising plan? When was the last time you looked at it or updated it?

## **Principle #3: Fundraising Is Everyone's Responsibility**

Because fundraising is so important to the success of your school, it needs to be made clear to your entire board and staff that fundraising is everyone's responsibility. Yes, you should have a development director or development team that spends 100 percent of their time fundraising (or, in smaller schools without a development staff, a key volunteer or vice principal who spends a significant portion of his or her time raising money). However, "assisting with fundraising" should be part of everyone's job description.

For your teachers and administrative staff, this means that they should be willing and able to help at fundraising events and with fundraising presentations like tours and roundtables (donors love to hear from the folks who are actually providing the services they are funding, instead of just the development staff). It also means that your teachers and administrators should constantly be on the lookout for fundraising opportunities in the course of their daily responsibilities.

Likewise, everyone on your board should be expected to help fundraise. This means making personal asks, selling tickets to events, and providing contacts for your fundraising mailing list. Yes, some board members will be primarily responsible for fundraising (such as your development or event committees) and some will not take a leading role with fundraising (focusing more on programs, governance, government relations, etc.), but everyone on your board should understand that they are expected to fundraise.

Because you are expecting your board and non-development staff to help with fundraising, and because these folks may not have a fundraising or sales background, it is imperative that you offer fundraising training to your board and entire staff on a regular basis. My suggestion is that you hold an annual board retreat that is 50 percent focused on vision, strategy, and programs and 50 percent

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focused on fundraising training and strategy. Likewise, I suggest that you hold at least one, if not more, one- or two-hour fundraising training sessions as part of teacher and administrative in-service days each year.

Does everyone at your school understand that fundraising is part of their job description? Does everyone on your board help with fundraising?

## Principle #4: Your Fundraising Strategy Needs to Be More than Just Holding Events

I can't tell you how many schools I have worked with where the entire funding strategy was to collect 100 percent of tuition and hold a series of fundraising events over the course of the year. Inevitably, schools that adopt this strategy are doomed to be overworked and under-resourced.

When it comes to fundraising, it's easy to say, "Let's hold an event!" (Or a walk-a-thon, bake sale, or magazine drive.) It's relatively simple, kind of fun, and at least everyone knows what they're supposed to do. The problem is that events like these aren't scalable, and they don't lead to long-term relationships with donors. Instead of receiving an increasing number of annual fund gifts each year from committed donors, your school is forced to slog through parent lists to put together a new committee each year, sell new tickets, and train new student sellers.

It's enough to drive a school administrator nuts!

What most nonprofit professionals know, but many school administrators have not yet picked up on, is that the best type of donors are those who are so moved by your mission that they make a decision to give year in, year out, for years, decades, or more. To find donors like this, you need to have a true fundraising strategy — one that includes holding one-on-one meetings, making phone calls, cultivating parents and alumni, and making true fundraising asks. It might seem less comfortable than simply holding another fundraising event, but it's the true path to fundraising success.

## Principle #5: Relationships = Success

The fifth and final basic fundraising principle that every school needs to understand is that building strong relationships is fundamental to fundraising success. **Fundraising is all about relationships.** Sure, you can send out fundraising letters to parents and alumni twice every year, but the real money comes on the back end as you develop relationships with those donors who responded to your initial prospecting letter. Ditto for personal asks, foundation support, online fundraising, etc. — the real money is in the relationship.

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Your development staff (and your board) should be in the relationship-building business. The goal of your fundraising efforts should be to identify people who might want to donate to your school if they knew more about it (or people who already know about your school but not about your financial needs), and then to develop a relationship with them through cultivation activities. It is only after the relationship is built that an ask should be made. Sure, making an ask before a relationship is established might lead to a gift, but it will be far smaller than one that is made after a strong relationship is developed.

Once a relationship is established and a gift is made, the school will need to work hard at stewarding donors to maintain relationships in order to receive follow up donations like annual gifts, bequests, and more.

Donors want to feel like a part of your team. When they do, they will be inclined to give again and again. Build relationships with your donors and turn them into friends for life.

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## About the Author

Joe Garecht is a nonprofit fundraising consultant, author, and speaker based in Philadelphia. He served as executive director of Business Leadership Organized for Catholic Schools (BLOCS), where he helped raise more than \$20 million for endowments and scholarship funds for private Catholic schools, and created training programs to teach schools how to develop annual funds, run capital campaigns, and set up fundraising boards. You can connect with him through his [website](#), on [Twitter](#), or check out his [podcast on iTunes](#).



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