



Success Reexamined:

Insights on the Key Strategies that Led to a Successful Campaign

NYSAIS Institutional Advancement Conference
March 13, 2018

Presented by: Maureen Barry, Director of Development, Saint David's School
Eric Javier, Principal & Managing Director, CCS Fundraising





Agenda

1. Welcome & Introductions
2. Today's Philanthropic Landscape and Support for Education
3. Four Key Strategies: *Lessons from Saint David's School*
4. Questions & Discussion

Today's Presenters



Maureen Barry

Director of Development
Saint David's School

Eric Javier
Principal & Managing Director
CCS Fundraising



About Saint David's School

Founded in 1951 as an elementary school for boys in the Catholic tradition

Grades Pre-K through 8

422 Students

129 Faculty and Staff

Robust after school program with classes in a variety of disciplines

\$70 Million Endowment



About CCS



Leading fundraising
consulting and
management firm



Worked in 5,000 cities
around the world



Largest and
most experienced
permanent staff



Varied and flexible
client engagements



Clients are among the
most recognizable brands
in philanthropy nationally
and internationally



New York – Chicago
Philadelphia - San Francisco
Los Angeles - Baltimore
Washington - St. Louis
Dallas - Seattle - Boston
London - Dublin

CCS Independent School Experience



Allen-Stevenson School



Berkeley Carroll School



Boston College High School



CHAPIN

Chapin School



Collegiate School

CorlearsSchool

Corlears School



Friends Academy



Gunston School



Gonzaga College
High School



HAWKEN

Hawken School



Kent Denver School

Malvern
PREPARATORY SCHOOL

Malvern Preparatory School



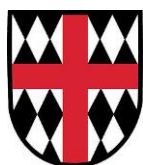
Manhattan Country School



Saint David's School



The Spence School



St. George's School



The Storm King School



Regis High School



The Town School



West Catholic Preparatory
High School



Today's Philanthropic Landscape and Support for Education

Philanthropy in America



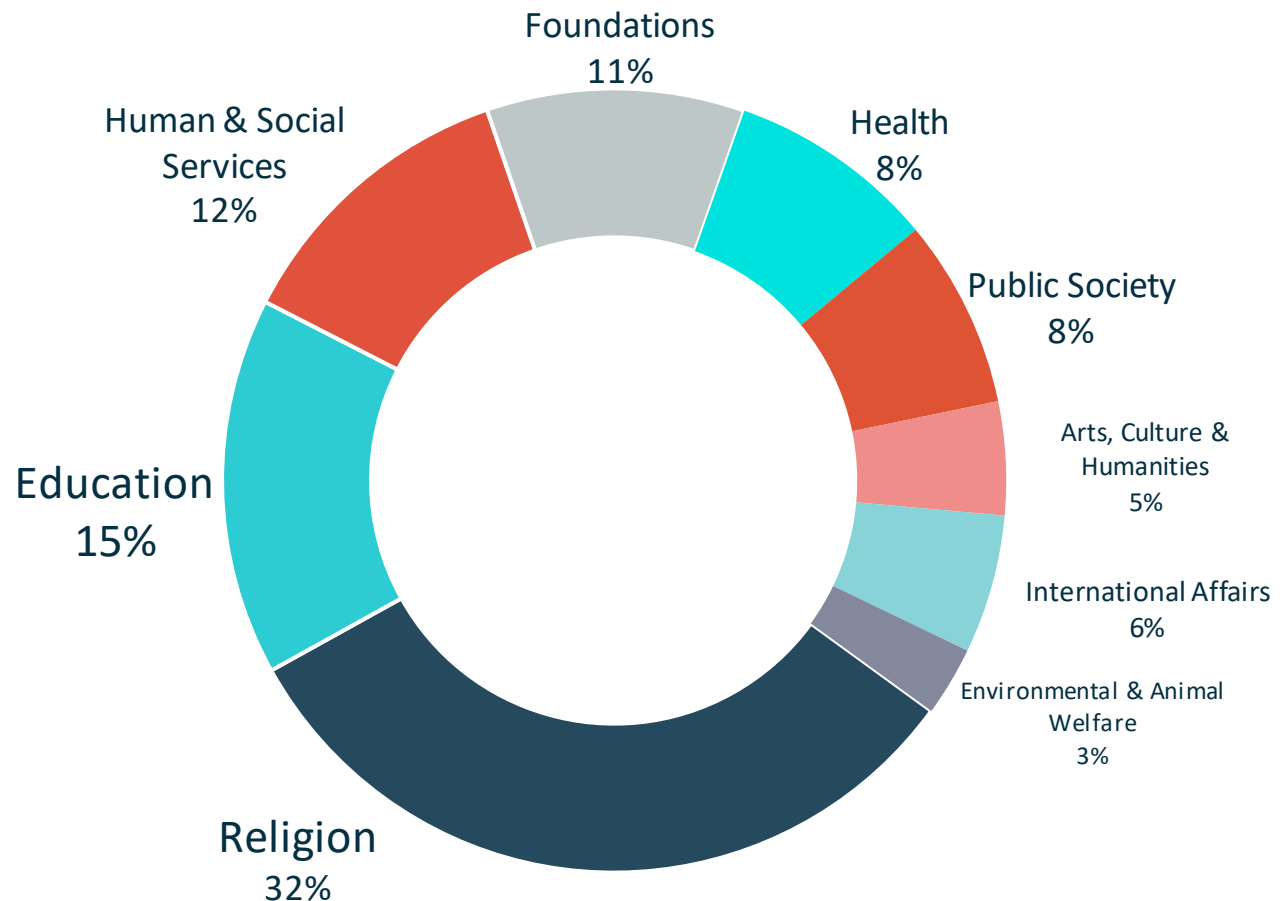
15%

APPROXIMATELY

\$60B

WAS RECEIVED
BY EDUCATION
INSTITUTIONS

Americans gave \$390.1 Billion in 2016!

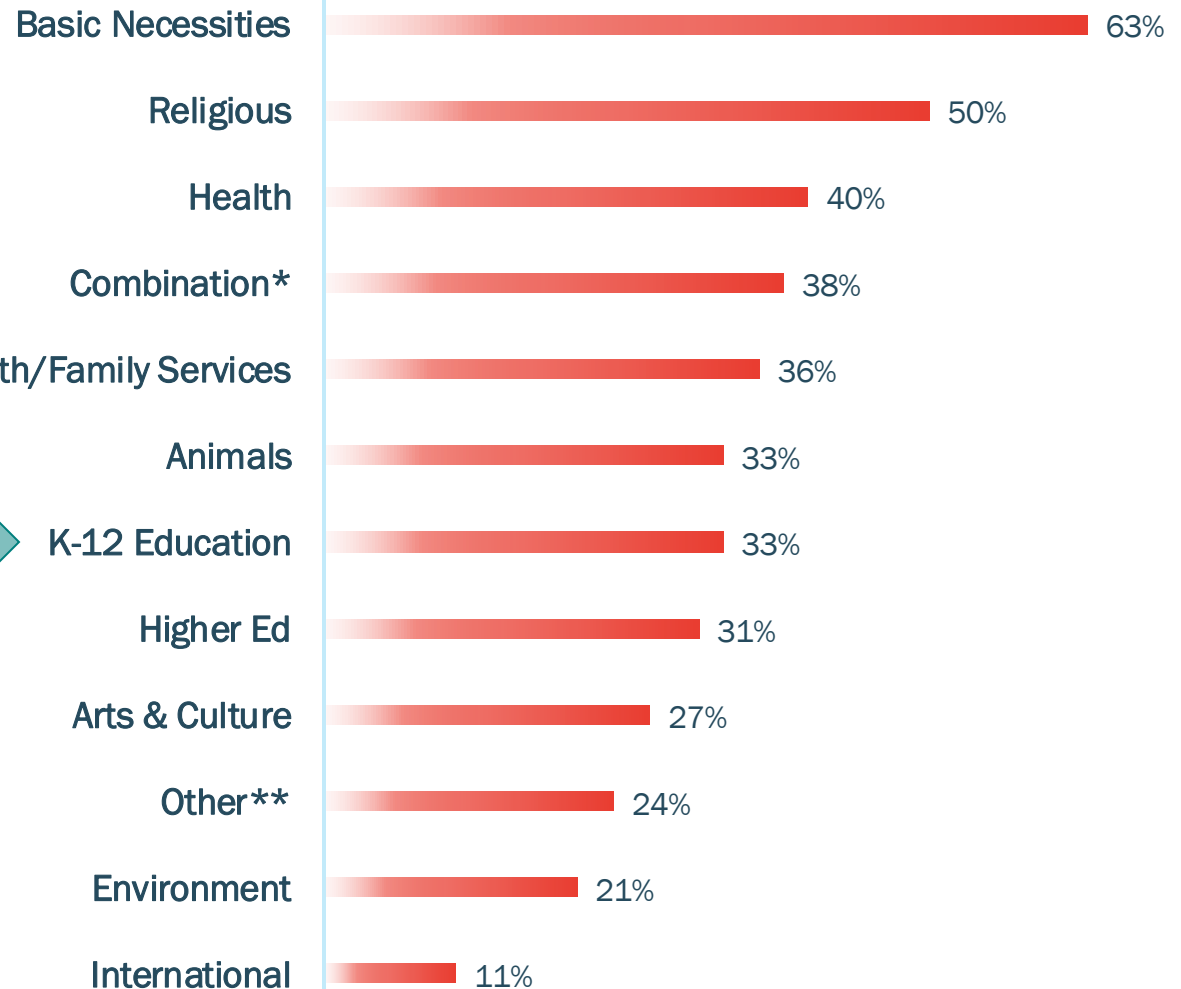


Where High Net Worth Individuals Give



33%

OF HNW
INDIVIDUALS GAVE
TO K-12 EDUCATION



Independent Schools Snapshot

Median total expenses per day
school student:

\$19,254

Median day school endowment
per student:

\$10,885

Median annual giving per day
school student:

\$1,137

Median capital giving per day
school student:

\$1,424

Support for Independent Schools

	Annual Giving (Median Total Given per School)			Capital Giving (Median Total Given per School)		
	2006-2007	2016-2017	% Change (2007-2017)	2006-2007	2016-2017	% Change (2006-2017)
All Schools	\$498K	\$598K	+20%	\$907K	\$1.49 Million	+64%
East Region (NAIS members)	\$608K	\$806K	+33%	\$712K	\$1.47 Million	+107%
NY Schools (NAIS members)	\$818K	\$1.05 Million	+28%	\$809K	\$1.50 Million	+85%

➤ Parents contribute the largest fraction of annual giving (37%) and their influence has grown in the last decade

➤ Trustees/board members contributed 25% of total capital giving

➤ Capital campaigns trigger alumni giving:

- 31% contribute to capital campaigns, while 9% support annual appeals

Sources of Support

2016-2017	Annual Giving		Capital Giving	
	% Participation (of total solicited)	Median Gift	% Participation (of total solicited)	Median Gift
Alumni	10%	\$406	63%	\$5,900
Parents	68%	\$1,107	60%	\$12,743
Orgs	73%	\$2,707	100%	\$25,000
Trustees	100%	\$4,531	91%	\$28,275
Parents of Alumni	11%	\$699	73%	\$8,849
Faculty/ Staff	96%	\$134	67%	\$339



The Campaign for Saint David's

Background

1951
-
1963

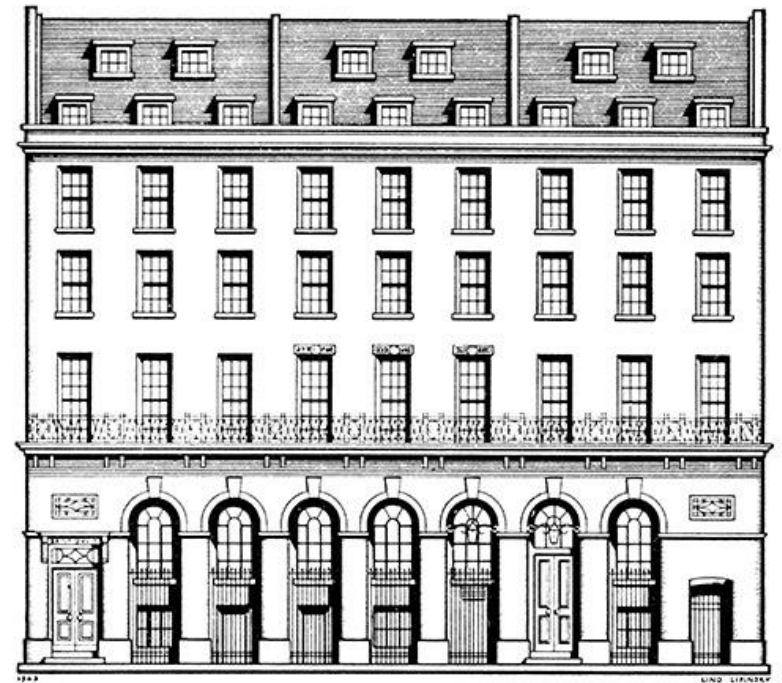
Saint David's opened at 12 E. 89th Street in the UES of Manhattan
Later purchased 14 and 16 E. 89th Street

1972

Purchased **Graham House** located at 22 E. 89th Street

1972
-
2016

Gradual integration of Graham House and existing school



Where did we start?

70+

strategic conversation
participants

96%

cited they would consider a gift
to the campaign

**Space Constraints
and Facilities**

was cited as the
#1 greatest need

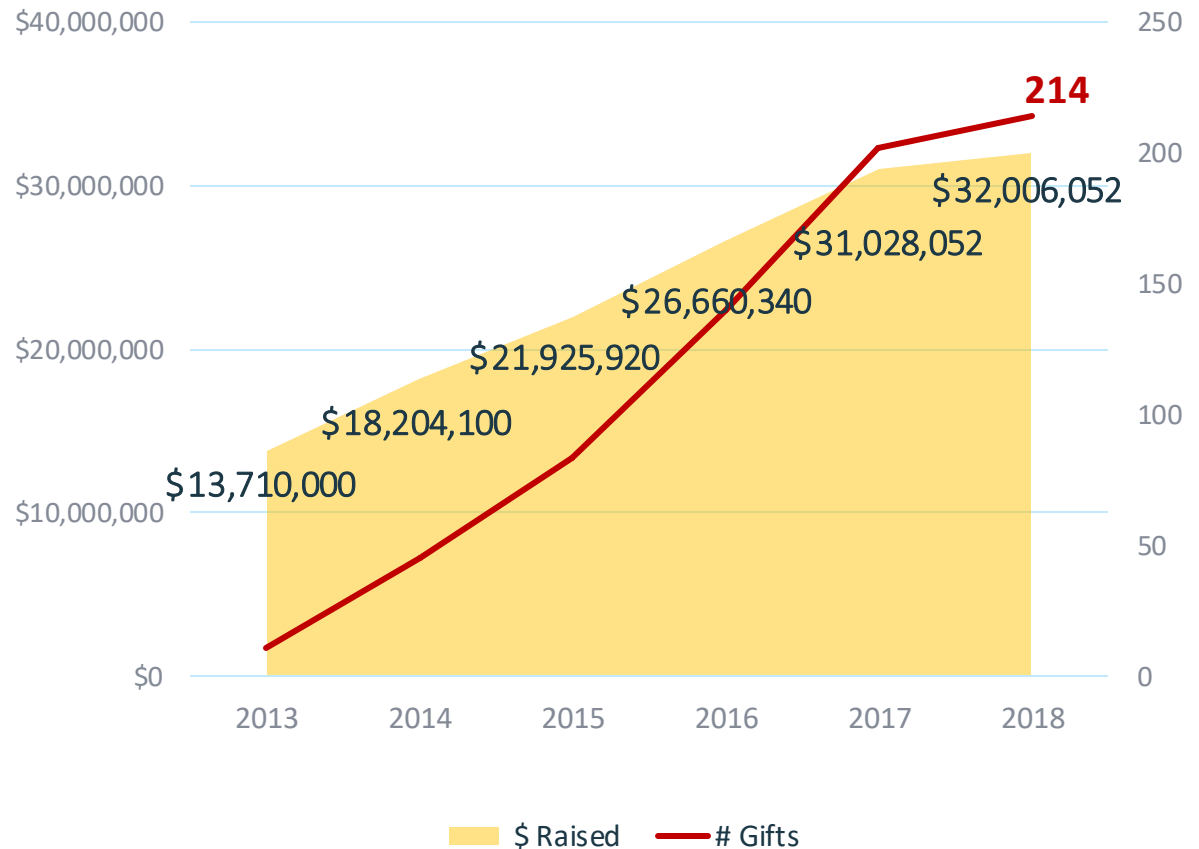
Saint David's School and CCS collaborated on a **campaign feasibility study** over a four-month period beginning in October 2012.

- Strategic conversations with key stakeholders
- Close collaboration with leadership, staff, and volunteers
- Regular committee meetings
- Wealth screening analysis

All That We Can Be: The Campaign for Saint David's

\$40 Million
Goal

214 Pledges
\$32 Million
To Date





Four Key Strategies:

Lessons from Saint David's School

Four Strategies

1. Develop Your Unique Value Proposition
2. Identify the “Big Ideas” That Inspire
3. Leverage Your All Star Leaders
4. Use Creative Cultivation Strategies



1

Develop Your Unique Value Proposition

Philosophy

- Ut Viri Boni Sint
 - That they be good men...
- “Balance in All Things”
- Four Pillars
 - Academics
 - Arts
 - Athletics
 - Spirituality



2

Identify the “Big Ideas” That Inspire

Space constraints – Facilities was cited as Saint David’s greatest need/challenge by study participants.

As a result of this campaign and for the first time ever, program will drive the allocation and use of space.

Key Features of the Project:

- Performing Arts Center
- STE(A)M Labs
- Grade-Level Suites
- Contiguous Athletic Facilities
- Third Dining Hall
- Ease of movement around the building



3

Leverage Your All-Star Leaders

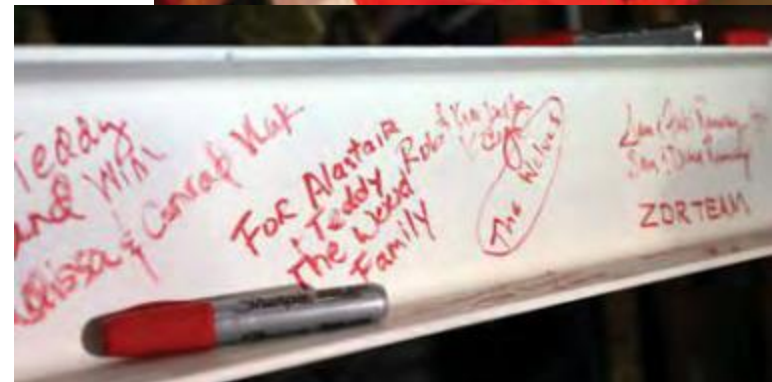


- Small Group Dinners hosted by the Headmaster
 - Campaign Committee Co-Chairs
 - Annual Vice-Chairs
-
- Campaign Committee members preferred *not* to solicit for gifts but were instrumental in other ways, such as opening doors, hosting events, providing strategic guidance to school leaders, and cultivation.

4

Creative Cultivation Strategies

- **Marking Milestones for Donors and Trustees**
 - Groundbreaking Event
 - Student council officers helped with the event
 - Beam Signing Event
 - All students signed the beam
 - “Topping Off”
- **Community Challenge Grants**
- **“Viewing” meetings** to showcase plans, renderings, and the full-scale building model
- **Hard Hat Tours** for families and alumni
- **Ongoing and open dialogue on project progress** with Saint David’s families and the surrounding community through bi-monthly e-newsletters, personal outreach, website updates, social media, signage throughout the school, and special giveaways.



Questions and Discussion





Thank You FUNDRAISING

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