**Internal Readiness Components**

- Revenue trends and fundraising history
- Major Gifts Program
- Strength of the Major Gifts Pipeline
- Qualified Prospects → GAP analysis
Internal Readiness Components

- Engagement
  - Boards (School/Foundation)
  - Alumni
  - Parents
  - Past Parents & “Friends”
  - Grandparents
  - Principal/Head of School
  - Faculty/Staff and Retired Faculty

- Building a qualified prospect list
- Research
- Capacity Assessment: what is possible?
Internal Readiness Components

- Volunteer engagement
- Readiness of Development team
- Building a staff campaign team
- Benchmarking
Internal Readiness Components

• Establishing case priorities
• Brokering the Case for Support
• Assessing the Culture of Philanthropy
Revenue Trends and Fundraising History

• Quantitative analysis
• Five year historical data
• Number of donors
• Average gift size
• Constituency giving trends
Revenue Trends and Fundraising History

- Growth potential for Major Gifts
- Previous major campaign results
- Demographic indicators
- Giving by class/decade
- Planned giving potential
Major Gifts Program

- $1,000+ gifts increase
- Major gifts vs. other revenue streams
- Proactive vs. reactive
- Measurable, strategic plan
- Cultivation and raising giving sights
- “Just in time” cultivation
- Donor stewardship
- Recognition
Major Gifts Pipeline

- Prospects identified
- Qualification
- “Suspects” vs. Prospects
- Evaluation criteria
- LAI (Linkage/Ability/Interest)
- Measurable progress
Building a Qualified Prospect List

• Relationship inventory exercise
• Realistic engagement assessment
• “A” level prospects: $500,000+
• “B” level prospects: $100,000 – 499,999
• “C” level prospects: below $100,000
• “Transformational” Prospects
• International Prospects
Constituency Engagement

- Boards (School/Foundation):
  - Participation
  - Major Gift support
  - Percentage of overall revenue
  - Campaign leadership potential
  - Comprehension of campaign responsibilities
Boards

- School identified as personal philanthropic priority
- Ownership of case and campaign
- Defining the philanthropic agenda
- Commitment to financial and resource investment
Alumni

- Percentage of overall revenue
- Participation level
- Segmentation by class/decade
- Alumni Association
- Measuring philanthropic capacity vs. intent
- Legacy Families
Alumni

- Chapter activities
- Identification of Top 50
- Do they think of School in Major Gift context?
- Can engagement be accelerated?
- Day School vs. Boarding
Parents

- Current financial commitments
- Percentage participation
- Current alumni parents
- Culture of philanthropy "shift in thinking"
- Day School vs. Boarding
- Number of parents in Junior School vs. Senior School
- Lifetime value of parents present and future
Past Parents & “Friends”

- Engagement strategy utilized
- How many are current donors?
- Post graduation participation
- Donor stewardship
Grandparents

- Does engagement and giving program exist?
- Legacy family connection
- Duration of School affiliation
Principal/Head of School

- Appetite for fundraising/campaign
- Coaching
- Recognition of time commitment
- Articulating vision
- Championing culture of philanthropy
Volunteer Engagement

- Board Chair/Board involvement in fundraising
- Advancement Committee
- Alumni Association
- Parents Guild/Association
- Campaign Structure:
  - Pre-campaign steering committee
  - Models
Development Office

- Policies and procedures
- Research capacity
- Performance metrics
- Prospect management
- Database readiness/utilization
- Determine staffing requirements
The three parts of the case

School's Story
Big Messages platform
Answers to questions

Priorities and opportunities donors can support

Amount of money required short term, and long term

How money will be raised and distributed

Who will be involved in raising money, and reporting on the use of funds
Case for Support

- Establishing vision based priorities
- Relevance to School’s strategic plan
- Avoiding a “wish list”
- Building internal consensus
- Rigorous planning
Building the Case for Support

- Determine how you will seek input from key stakeholders
  - Face to face interviews
  - Brainstorming sessions
  - Town Hall meetings

- Representation from:
  - Faculty, Staff, Boards, Volunteers, Key Alumni, Parents, Lead Donors, Students

- The best stakeholders for this exercise are:
  - Big picture thinkers
  - Live the mission, work at achieving the vision
  - Ask the tough questions, push you relentlessly
  - Can debate any point
  - Have great stories to tell
Questions for consideration?
Contact Information

Michael Logue - Senior Vice President & Partner
416-340-9710 Ext. 232
mlogue@kciphilanthropy.com

Susan Storey, CFRE - Vice President
416-340-9710 Ext. 224
sstorey@kciphilanthropy.com