

UPDATE

David Formosa

- Overview of the agenda
- Thank you to our sponsors
- Website
 - Up and running, everyone can access this now without a login
 - In the future, each CDN member listed on the database will receive a login. Please ensure your details are up-to-date
- Social media ... we now have a Facebook and LinkedIn page

CAPITAL CAMPAIGN AND FUNDRAISING: A PRINCIPAL'S PERSPECTIVE

Siena College, Gaynor Robson Garth (Principal)

- A challenging journey
 - The College is 76 years old ... we needed to start branding when I started, that was a challenge
 - We started marketing, got the brand right and then got the Master Plan together
- You need to look at many options for fundraising We will never qualify for funding for capital works with a SES of 118
- I needed to convince the board to come along on the journey
- Went to a one-day workshop (Master Class) and realised it wasn't about sausage sizzles
- We needed a feasibility study first ... to find out whether or not we had the potential to raise money
- Campitelli did the feasibility study and then there was an acceptance from the board to develop a College of philanthropy
- They capitalised on the building they were about to begin ... this would allow them to enhance what was proposed
- We set up a project committee We needed a high profile committee ... our database was terrible. It is the Development Team that has been instrumental in improving our data and running the campaign
- Parents are resistant, staff are resistant ... you need be sensitive in your approach
- They discovered an alumni that they were not aware of ... Susan Alberti. They asked her to be the patron on the campaign (she would know they were asking for money)
- Susan has mentored them with her insights ... they have hosted events ... trying to engage the past students without asking for money ... 75th anniversary ... investment in the database ... they published a book of 75 stories (challenges with editing)
- Staged the campaign over four pillars ... they are now in the last stage
- Some of the costs have blown out ... therefore how do you deliver what you do not get all the money for
- Not as much resistance now ... Kath Walsh will present to the board to ... the costs to do all of this often needs to be justified
- Asking for money is not easy We continue to learn from our mentors

- Educate Plus conference has great expertise in this area
- On occasion you get surprised ... even some educational partners Get influential people to speak at your functions
- People do like to give ... there is a great reward in giving
- Recognition walls acknowledge those who have donated
- You set up relationships now in the hope of benefiting in the future
- College archives What they display and bring to events truly speaks to those returning
- Those working in this area must persist The first year 'fun run' was a community event ... it didn't generate much money But the Parents Association enjoyed their opportunity to participate
- We are constantly assessing the costs ... constantly trying to set up relationships
- We have learnt from our mistakes
- The work we have done has enhanced the relationship with the community two hundred fold
- This is about viability long into the future We introduced giving through the fees
- Board chair was involved in the ask ... some board members were very questioning. The board now needs to host functions, they need to be part of the fundraising process

Greg

- If you can't convince yourself it is important ... you can't convince anyone else
- Regardless of the total ... the same rules apply
- This is why feasibility study is important because you need to know what capacity the school has to raise money

CATHOLIC SCHOOLS GUIDE – Greg Campitelli

- Founded in 2010
- Independent
- One page /school
- Treats everyone the same
- Free to end user
- Each guide comes with a different theme
- Next year's theme is 'sustainability and the environment'
- Delivered to 70% catholic schools throughout Melbourne (Year 2 – 6)
- Early learning, state schools, parishes churches, libraries
- New website ... best practice in education articles, video options, page dedicated to the school, job advertisements, advanced search feature (500-1500 visits/school) traffic reports available
- Not driven by profit
- Launched Facebook and Twitter ... news feed twice/week

Campitelli Consultancy – offers services in marketing and enrolment plans, feasibility studies, capital campaigns, bequest programs, alumni engagement

IT ALL ADDS UP: FUNDRAISING IDEAS OUTSIDE OF CAPITAL CAMPAIGNS

Kath Walsh – Fundraising Consultant

- I believe every school can fundraise and fundraise well
- I worked with a school with no capacity ... but they have a donor who is not linked with the school but supports the school because it was who he was
- Our job is to put the school in the best financial position we can
- We give dignity to fundraising

- The principal must be on board... if it's not on their agenda, why would it be on yours
- Business manager must be on board
- You must know what you're fundraising for ... people need to know ... you must say what it's for
- You must be enthusiastic and know how much you want ... set a goal
- You must know when the funds are needed by
- You should report to the principal, especially if you are fundraising
- At the start of each year, put down a wish list ... school bus, TV in library ... this gives clear direction to the fundraising for the year for you ...parents association etc ... so they can help focus on what they want to contribute to
- The culture of giving in the school increases the level of connectedness

Annual Giving

- This is something to think about as a start for fundraising
- Encourage your Principal/BM ... involves all members of the community who is connected to you
- You ask once year for a financial gift ...must have a focus ... mini appeal eg sandstone windows ... put a heart spin on it whenever you can
- You must always have online giving as an option too
- Previous donors also receive material but just with a different letter
- Develop materials ... words must be right ... must be visually appealing
 - Letter is the cheapest
 - DL brochure with tear off
 - You may call a couple of weeks after posting
 - You must promptly receipt and thank ... big gift thank you calls must come from the Principal but everyone must be called
 - \$30 - \$40K/year
 - You cannot assume who can or can't give
 - Line – tick box ... I would like further information about making a bequest to the school ... I have already included you in my will
- Must happen in May (end of financial year)

Bequests

- Potentially the biggest source of revenue
- Unknown quantity ... you may know who but you don't know how much or when
- If you don't ask, it may never occur to them
- Start with your database
- Give them an emotional and compelling reason to give to the school
- Don't put it off ... other organisations are asking them
- Women live longer than men ... so boys' schools ... be nice to the wives!

Events

- Often the amount of work is disproportionate to the amount of money you make
- Avoid events that don't make money
- Avoid social justice events ... you are not raising money for the school
- It takes a lot of time ... the principal needs to give you the time
- Start at the end, work backwards Dinner, fashion parade, budget, task list, fundraising objective ... plan ahead
- Explore every avenue to get what you need ... and cut down the costs

- Marketing activity plan and fundraising timetable for the year so you see that nothing is crossing over so everyone knows what is going on
- No event is successful if no one comes ... make sure you have table captains, someone else should have the responsibility to sell tickets and have sponsors for the table
- Say thank you ... let everyone know how much you raised ... evaluate honestly
- Our most successful event was the series of council dinners organised to raise money for the equity scholarships ... each council member sold tickets for the tables ... Auction ... sponsorship

Raffles

- Must get permission if external ... not for internal
- Consider a short run raffle ... 1000 tickets for \$50 ... return is more for less effort
- Make sure it doesn't clash with anything else

Kick backs

- Entertainment books ...nutrimetic
- Whatever you do ... don't give them your database

Sponsorship

- Cash or kind ... one is tax deductible
- They will get something ... match the interest of the donor with the project of the school

Scholarship fund

- DGR status (template)
- Academic or equity based
 - Dignity and support for the students
 - Debt removed for the schools
 - Opportunity for those who wish to help, can
- Easiest fundraising to do they are helping a child
- Academic scholarships
 - Sponsored
- Over a seven year period we went from 7 scholarships to now having 60 scholarships and money in the bank

CREATEL PUBLISHING

Angelo

- 6000 schools throughout the country
- Teacher planner is the biggest seller
- Teacher and student planner
- Online teacher and student diaries
- Teaching accessories, covers, record books
- Huge range of planners and accessories
- Planners are focusing on professional practice and student wellbeing
- StudyQuest ... catholic diary

WILLIAMS ROSS ARCHITECTS

Tammy Beck and Virginia Ross

- We work with schools on Master Plans ... what type of spaces do you want?
- Much easier to market a definable project ... three dimensional tools help you do this
- Use the design process to help generate for the fundraising program
- Siena ... chunked into stages that could be separated out ... \$5K for joinery ... \$500K library refurbishment
- Can the architect show the experience you need ... communication skills ... They must be able to engage with your team
- How will they conduct consultation ... focus groups, board, students, staff, parents ... They must also understand the workings of the school
- Need to talk about the educational purpose of the building ... not just their design
- What are others saying about their work? Do they have experience in this particular building type? Williams Ross specialises in Performing Arts and Aquatic and Sports Developments
- Processes
 - Do they really understand Catholic Schools?
 - Understand the role of the Board, Orders etc
 - Do they understand the role and constraints of funding bodies/approval processes?
 - Can they talk about your Charism? Do they understand you?
- New research has changed the learning spaces ... technology has changed the delivery of education ... technology is now supporting the education, it is a tool ... now the spaces are about people and their interactions
- A contemporary learning space consists of
 - Abundance of natural light
 - Great room acoustics
 - Visibility across learning spaces
 - Physical connection across learning spaces and to the outdoor environment
 - Wireless technology
 - Purposeful design to suit the activities
 - Spaces for multiple activities
 - Spaces where students and teachers want to be ...
- Contemporary Learning Areas – Specialist areas
 - You need the doors to be able to close
 - The look is different ... you can see the activities but they need to be closed down
- Curriculum and Space
 - Curriculum should be ahead of the design
 - Allocate time for staff to investigate learning space and design
 - Budget for staff time, professional development and research
 - Give the master plan consultation enough time
 - Be willing to create experimental spaces and learn with and from them
 - Align language between teachers and architects ... get on the same page through works and images
 - Can help schools embrace organisational change
 - If possible ... produce some experimental spaces ... therefore don't invest too much in this but experiment where you can
- Language of Learning Spaces
 - Jargon helps no one
 - Just talk about what you want to do and how to do it
 - Take small steps
 - Let them own the proposal – put your ego aside
 - Change is difficult ... don't expect people to like it ... show them and convince them
 - Acknowledge the pain
- Marketing Learning Spaces

- Contemporary learning environments will enable richer experiences
- The school will support you in the professional development
- Your development will enhance your career path
- Allocate time for staff to visit other schools
- Students – generate excitement
- Students – ensure the student voice is heard
- Engage students in developing the design
- Parents – it's a very different world from when they were educated
- Today's children will have multiple careers ... working to be at the cutting edge ... you must be able to show where you are taking the school community
- Must always have smaller projects pop out of the Master Plan ... then the parents can see that we are constantly improving the environment for the students... this will also attract the best teachers
- You must have an ongoing program ...you need to develop funding now for the future

GENERAL BUSINESS

- Professional learning June 24 for Tasmania
- Friday 18 November, Siena College
- Thank you to our sponsors
- Thank you St Aloysius