



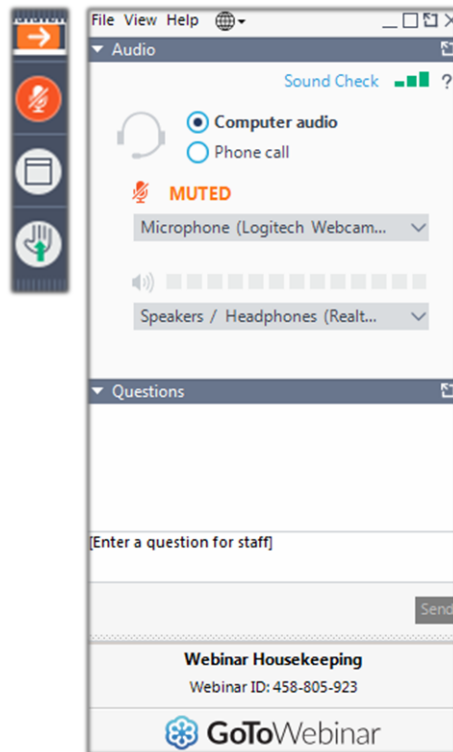
**Futures in Education**  
FOR BROOKLYN AND QUEENS  
*Changing Lives Through The Gift Of Education*



## **SCHOOLS & ACADEMY WEBINAR #5:**

Donor Data and Usage

# Webinar Logistics



To join audio:

- Choose “Computer audio” to use VoIP and listen through your computer  
OR
- Choose “Phone call” and dial using the information provided. International numbers available.
- Throughout the webinar please type your questions here for discussion later

# Points for Discussion

1. Who are our prospects?
2. How do we get them into the database?
3. Once they are in the database, what now?!
4. Questions
5. Additional Resources





# CCS's Experience with Independent Schools and Religious Organizations



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of  
NEW YORK





# Today's Presenters...



**Sean King**  
Executive Director  
CCS Fundraising

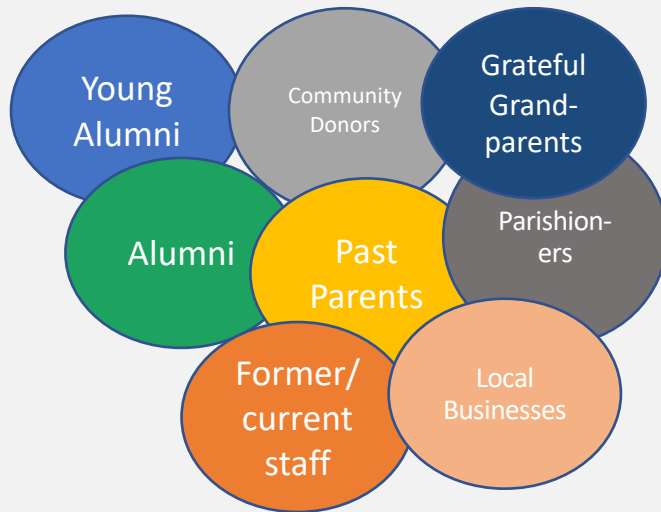


**Kaitlin Leonard**  
Vice President  
CCS

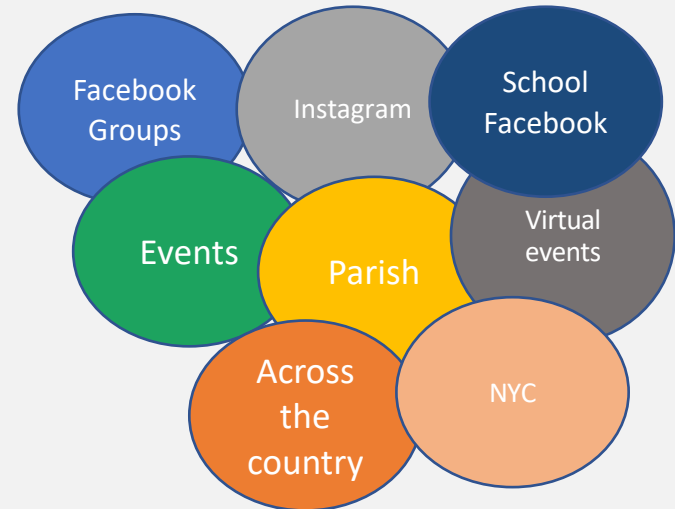
## Key Questions:

- What do we do once we have access to the donor database?
- How should we use the donor database?
- How can using the donor database help us systematically reach out to our alumni and friends?
- When should we be accessing it?

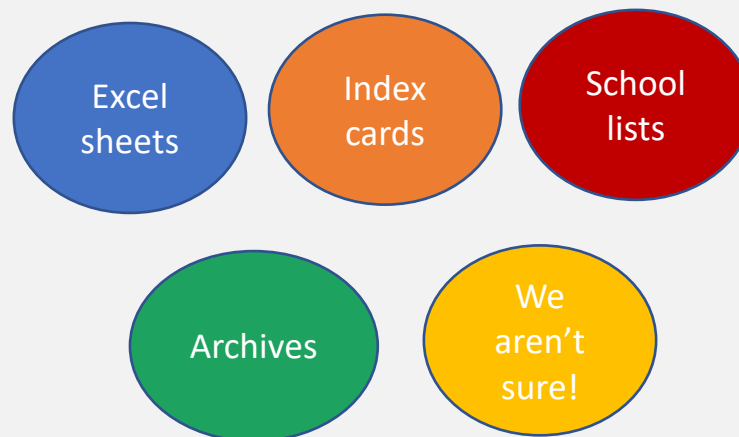
## Who are our prospects?



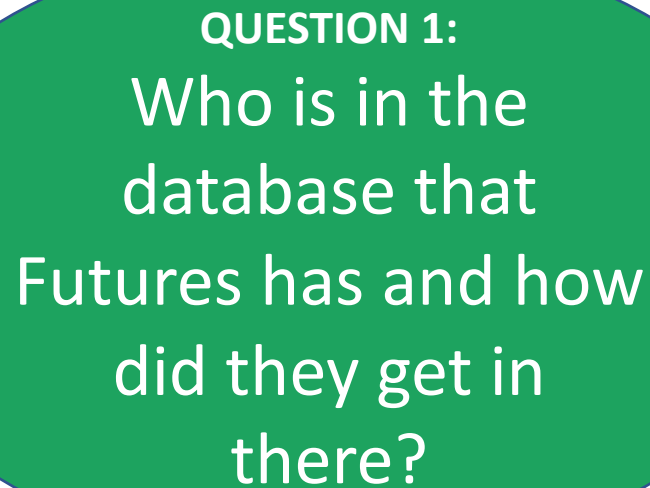
## Where are prospects active?



## Where do the records “live”?



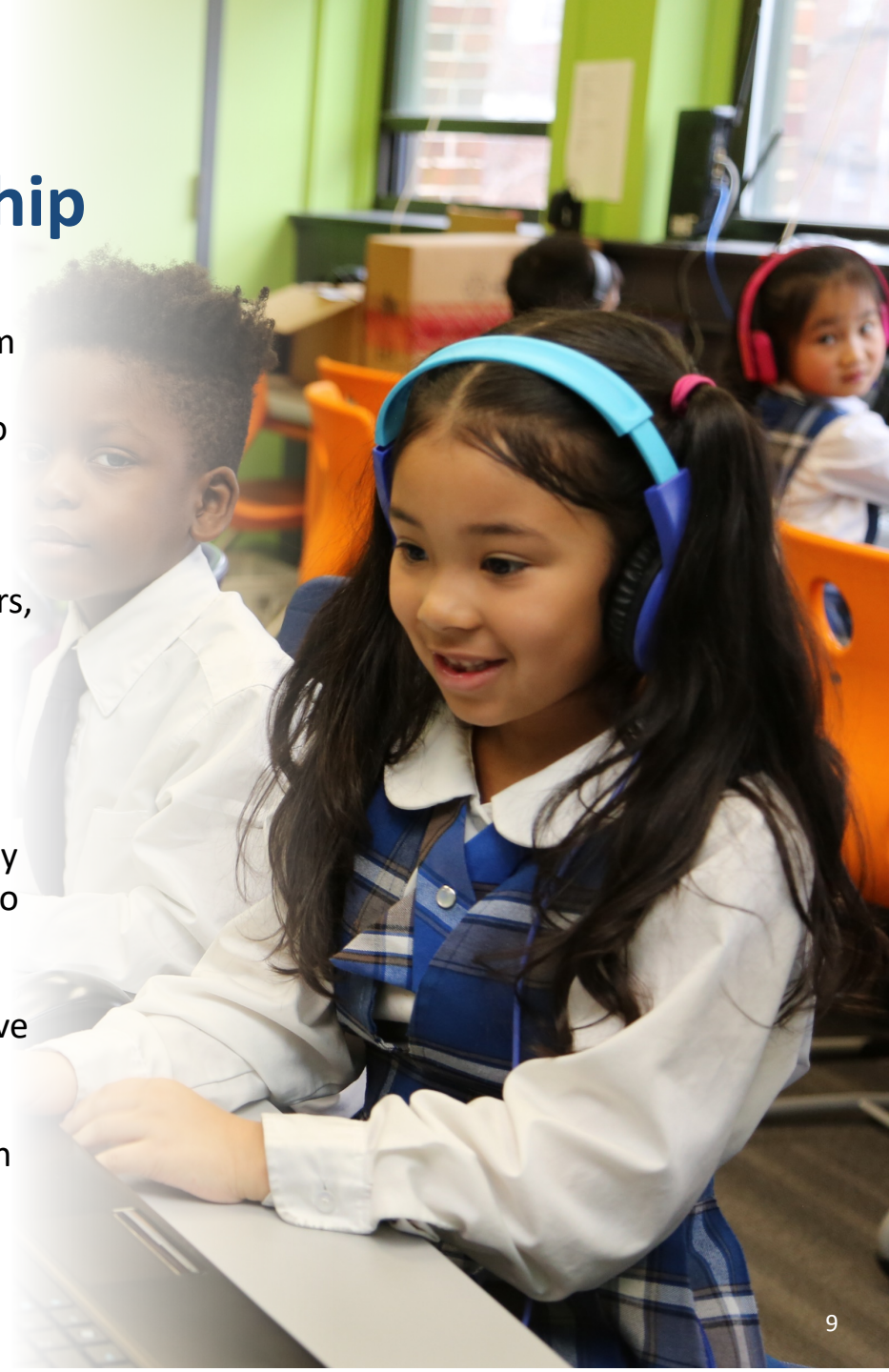




QUESTION 1:  
Who is in the  
database that  
Futures has and how  
did they get in  
there?

# Catholic Alumni Partnership

- Schools that originally started in the CAP program and even those that joined later, provided 8<sup>th</sup> grade attendance records that were converted to digital records.
- In some cases, incomplete data was provided, which may mean missing names, graduation years, etc.
- All records were run through a public search to find current address information
  - These searches have a 40% to 50% accuracy – more work is needed to be done locally to find updated information
  - Records where there is a processed gift have a higher likelihood of being current
- This past year, 2020, all records were run through a wealth screening.



**QUESTION 2:**

How do we get our  
alumni, donors and  
friends records into  
the database now?



# Get Your Records In!

- Enter all names, addresses, emails, phone and giving information that you have available into Raiser's Edge. **Refer to the 1<sup>st</sup> Donor Database webinar for guidance on how to enter data.**
- Not sure what records to include? Include everything!
- Reach out Futures in Education to assist if you have spreadsheets that needed uploading. If it's 25 or more records, Futures can enter the records for you.
- Ask for assistance if you have any questions to [cap@futuresineducation.org](mailto:cap@futuresineducation.org)! Futures staff can schedule time to work on a plan for your school.
- Special note: Futures in Education is working on a method to upload all recent 8<sup>th</sup> grade graduates from Option C.



**QUESTION 3:**

How do you find  
updated information  
on your alumni and  
potential donors to  
edit in your  
database?

# Consider an Alumni Survey

- Examples (contact DeSales Media or your website admin to get this set up TODAY!):

<https://truecrossschool.org/alumni-questionnaire>

<https://diopitt.org/alumni-survey>

<https://www.sdcatholicschools.org/alumni/>

- Collect all **biographical information**:
  - Name, Address, Email, Phone Numbers, *Professional information*
- Ask for **personal information**:
  - High school, college information, family information, parish information
- Don't be afraid to **“engage” them**:
  - Memory of school days, favorite teachers, favorite subjects and classes
- **“Ask”** for their help:
  - Gauge interest in volunteer positions, assisting in activities, enrollment possibilities
- **Push it out!**
  - See next pages



# Sample Survey

- Sample of the recommended fields for the form to maintain on your website.
- DeSales Media is working with Futures to make this a standard template. Engage DeSales or your web admin to get this set up today.

- **Alumni Information**

- Title REQUIRED First Name REQUIRED  Last Name REQUIRED  Suffix
- Maiden Name

- **Contact Information**

- Street Address 1 REQUIRED  Street Address 2  Apartment Number
- City REQUIRED  State REQUIRED  Zip REQUIRED
- Phone Number REQUIRED  Email REQUIRED

- **Other Info**

- Elementary Graduation School Name  Elementary Graduation Year
- High School Attended  College Attended
- Occupation  Employer
- Is there a special teacher/ staff member who impacted your life in a very significant way? Please tell

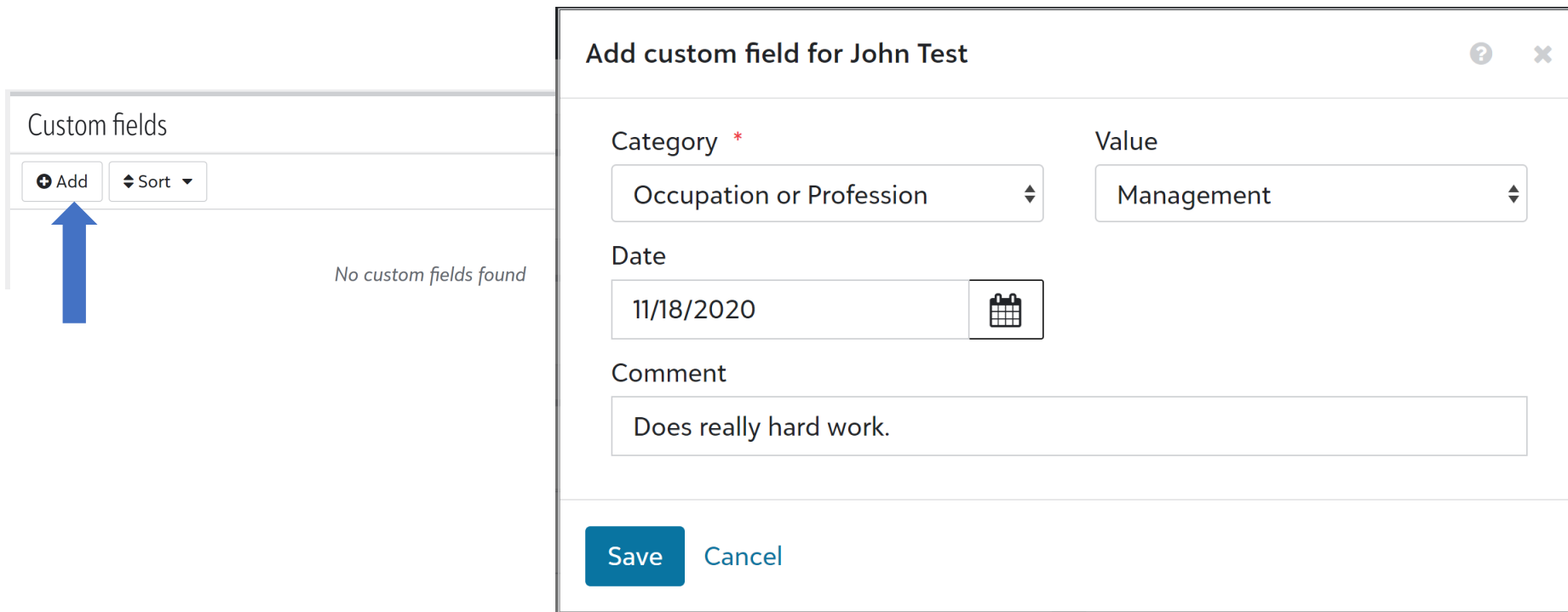
us:

- What is your favorite memory of SCHOOL NAME?

- I am willing to support my former school by: ☐ Monetary Donation ☐ Tuition Assistance ☐ Volunteering My Time ☐ Spiritual Support/ Prayer ☐ Serving as my Class Representative

# Updating Information from Survey

- Refer to the 1<sup>st</sup> donor database webinar on how to add constituents
- Use custom fields to enter in the information received on the alumni forms
- Available custom fields include: Elementary Graduating School Name and Year, High School, College, Occupation and Employer
- For the special questions (special teacher, favorite memory, willingness to support, use *Notes*)



The image shows a user interface for managing custom fields. On the left, a 'Custom fields' panel contains an 'Add' button (highlighted with a blue arrow) and a 'Sort' dropdown. Below this panel, the text 'No custom fields found' is visible. On the right, a modal window titled 'Add custom field for John Test' is open. The modal contains the following fields:

- Category \***: A dropdown menu with 'Occupation or Profession' selected.
- Value**: A dropdown menu with 'Management' selected.
- Date**: A text input field containing '11/18/2020' and a calendar icon.
- Comment**: A text input field containing 'Does really hard work.'

At the bottom of the modal, there are 'Save' and 'Cancel' buttons.

# Push it out – Where to Target

- Facebook, Instagram and other Social Media
  - There are many different social media outlets. It is important to know or to find out where people from your school community engage online.
  - On Facebook this could be:
    - Alumni groups - groups started by alumni where they interact and share stories
    - Official school/academy page – this should have a mix of marketing and development activity
    - Civic groups – tend to be very active with local community issues, promotion of businesses, etc.
- Parish bulletin and pulpit announcements
  - Sample on next page
- Parish and school websites
- Emails
- Grad year/decade captains – word of mouth
- Post card mailing



# Sample Text for Bulletins

## Bulletin Text

- Did you graduate from our school? If so, we would love to stay connected with you! Please visit the school's website to fill out our alumni survey and update your contact information. You can also fill out this form, print it, and drop it in the collection basket or at the rectory office. We appreciate your help and look forward to being in touch.
- Include on form: Name, email address, phone number and url to complete survey
  - (it may not be worth it to print all the survey fields on paper)
- Having the pastor occasionally say some words and to include this in promotion of the school/academy will go a long way

# Updating Confirmed Information

- Refer to the 1<sup>st</sup> donor database webinar on how to add constituents
- If you have now confirmed the contact information of an individual, it is good practice to mark an indication of this in the database for future reference
- Add the custom field 'Individual confirmed by school' and select 'yes'
- Enter today's date
- Add any relevant notes

The image shows a screenshot of a software interface with two main parts. On the left is a 'Custom fields' panel. It has a title 'Custom fields' and two buttons: '+ Add' and 'Sort'. A large blue arrow points to the '+ Add' button. Below the buttons, it says 'No custom fields found'. On the right is a modal window titled 'Add custom field for John Test'. It contains several input fields: 'Category' with a dropdown menu showing 'Individual confirmed by school', 'Value' with a dropdown menu showing 'Yes', 'Date' with a text input showing '11/19/2020' and a calendar icon, and 'Comment' with a text input showing 'He attended our 2020 alumni virtual gala'. At the bottom of the modal are 'Save' and 'Cancel' buttons.

Custom fields

+ Add Sort

No custom fields found

Add custom field for John Test

Category \* Individual confirmed by school

Value Yes

Date 11/19/2020

Comment He attended our 2020 alumni virtual gala

Save Cancel

QUESTION 4:

What are some best  
practices we can put  
in place?

# Activate Your Donors!

- Fundraising is about building momentum – you must jump into your donor lists and start to become active ambassadors for your school!
- People give to people - connecting with donors in anyway is valuable – phone, email, social media.
- Don't be afraid to delegate – there are roles for everyone! Board members, teachers, parents, and even students.
- Activating board members to say thank you is a great (and not scary) way to engage leaders in fundraising

# Sample Outreach Talking Points

- START WITH A THANK YOU:
  - For every gift, send a personalized thank you letter for every gift you receive. This can be hard mail or email.
  - Launch a thank-a-thon at the end of the year to say thank you. You can engage students in this process.
- PICK UP THE PHONE:
  - Call all your donors before you send the mailing and ask for their support
  - Call your donors when you send out a solicitation for an event before sending a request
  - Call your donors after you send a mailing, gift request, or event request
  - Call your lapsed donors by year end to ask for their support
- THINK ABOUT VIRTUAL ENGAGEMENTS:
  - “Tours” with the Principal or Board Chair, interviewing teachers and students
  - Short video segments, created on an iphone, of students saying thank you

# Sample Outreach Script

## Securing a Gift

- Hello, I am a volunteer, NAME, calling with St. Catherine's Academy. I am calling to first thank you for your support over the last year. It has been a busy few months, and we are proud of our commitment to Catholic education and to bringing our students and teachers back to the classroom this Fall. (INSERT 1-2 lines about the state of the Academy classes, etc.)
- This fall, we mailed our/will be mailing out a gift request letter. We know that you have been generous in the past and we are hoping you could consider supporting the school again. (Insert 1-2 lines about where the money goes: scholarships to drive access, programs, etc.)
- The easiest way to give is to go to our website at \_\_\_\_\_ and make your gift now.
- Thank you for your support!

## Getting to Know your Supporters

- When did you graduate?
- What did you love most about the school? (favorite teacher, principal, story)
- Why is supporting our school so important to you?
- How can we spread the word?



# Pulling Information from a Constituent List

- New Constituent List: Active Donors – Recent Gifts
- List sorted by latest gift – most recent give on top

Constituents											
Active Donors - Recent Gifts											
148 Constituents <i>List updated 5 minutes ago</i>											
Save Columns Share Export Add/Exclude More Find in this list											
Filters: Exclude solicit codes: Do Not Mail Total giving: 3 selected Clear all values											
Constituent summary	Lifetime giving	First gift	Latest gift	Greatest gift	Donor Type	Elementary Graduation Year	Graduating Grammar School	2020 Planned Giving Prospect	2020 Prospect Tier	Last action	Next action
...	\$25	\$25 one-time gift 11/4/2020 Holy Family Catholic Academy	\$25 one-time gift 11/4/2020 Holy Family Catholic Academy	\$25 one-time gift 11/4/2020 Holy Family Catholic Academy	Alumni	1978	Holy Family School		Tier 6 8/21/2020	None	Non

# Honor Your Loyal Donors & Leverage their Generosity

- Consider how you can acknowledge and thank your loyal supporters
- Consider creating a special giving society for those who have been generous for a long period of time
- Most importantly, ask donors to join each year in your communication to them.

# Example: Giving Circles for Recognition

## Fund For St. Anthony Giving Levels

### The Leadership Society

The Leadership Society is a group of lead benefactors to the Fund for St. Anthony, who through their generosity demonstrate a commitment to the ideals and mission of St. Anthony of Padua Catholic School. All individuals, companies and foundations are invited to join as members by making a gift of \$1,500 or more by June 30, 2021, to the Fund for St. Anthony. Members are invited to a recognition reception with our Pastor, Principal and the School Advisory Committee for their investment in St. Anthony of Padua Catholic School and are recognized in the school's annual [gratitude report](#). We are blessed and grateful for the devotion of the many members of The Leadership Society.

- \$15,000 and above Partners in Mission
- \$10,000 to \$14,999 Pastor's Circle
- \$5,000 to \$9,999 Principal's Guild
- \$3,000 to \$4,999 Beacon of Light
- \$1,500 to \$2,999 Circle of Saints

### Paduan Patrons

These gifts provide major support for ongoing development at St. Anthony of Padua Catholic School. We are grateful to all who participate in the life of St. Anthony of Padua Catholic School by making a commitment to the future of our outstanding students and faculty. Your generous gift will be recognized in the annual [gratitude report](#).

- \$500 to \$1,499 Blue & Green Club
- \$250 to \$499 Friends of St. Anthony
- Gifts up to \$249 Supporters of St. Anthony

# Examples: Donor Appreciation

## Donor Appreciation

Your continued investment in St. Francis and our Troubadours provides the essential funds needed for financial assistance for students in need, enriched academic programs, life changing faith experiences, top tier arts and athletic offerings, provision and upkeep of superior facilities, and other expenses not covered by tuition. We couldn't do what we do without you!

The Annual Report edition of the Pax et Bonum magazine is always special as it provides a platform for recognizing all our benefactors — alumnae, current and past parents, and our numerous friends — for their partnership in the mission of St. Francis Catholic High School.

**We host a couple of special events during the year to recognize generosity of time, talent and treasure:**

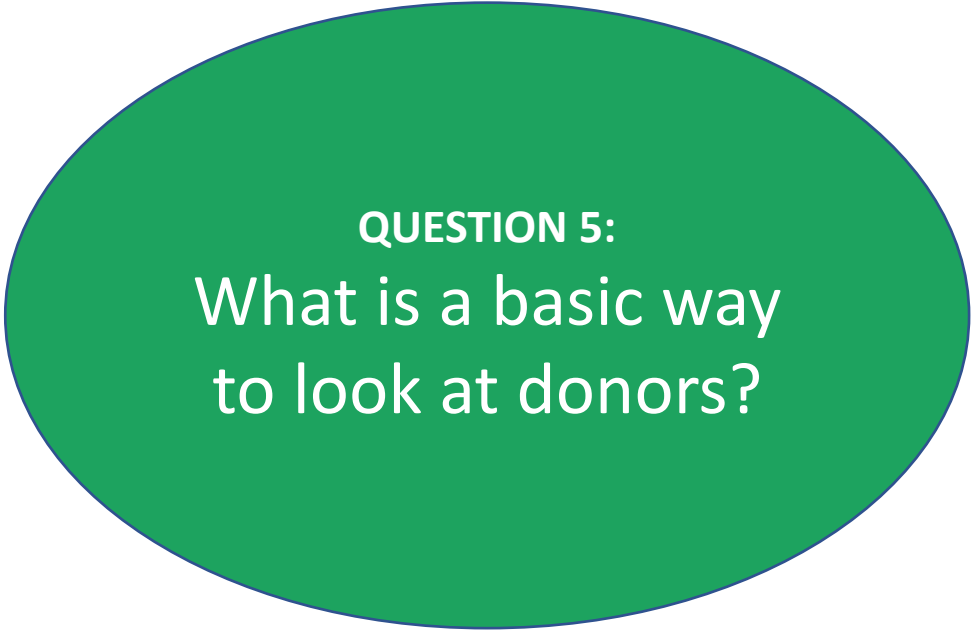
- **September 12, 2019:** Board of Trustees and President's Reception for 2018-19 donors of \$1,500 and above.
- **April 29, 2020:** Volunteer appreciation event recognizes those who so selflessly serve our students and school through countless hours of service.

# See Who May Have Forgot to Give

- **Look at your LYBUNT/SYBUNT Donors:** These are lapsed donors who have given in the past, but haven't given yet this year.
- **Use compelling messaging around their support**

Tuition revenue alone does not cover the full cost of an MC education, leaving an approximate \$3,000 per student gap. Marin Catholic depends on the generosity of its community to provide unrestricted, tax deductible dollars to the operating budget, impacting everything at MC:

- Helping MC meet its most urgent needs
- Providing support for faculty, staff, including curricular and professional development
- Enhancing programs in the arts and athletics
- Keeping the lights on
- Allowing Campus Ministry to offer life-changing student retreats in all grades
- Funding tuition assistance

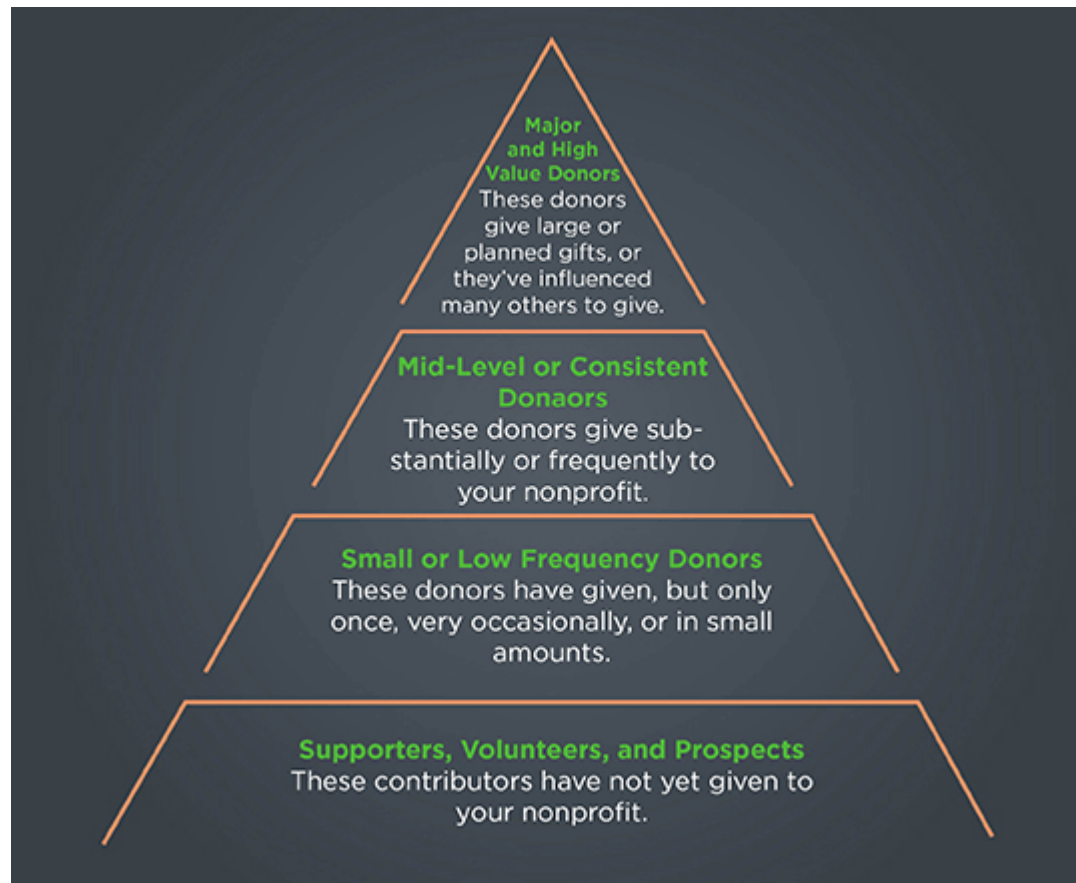


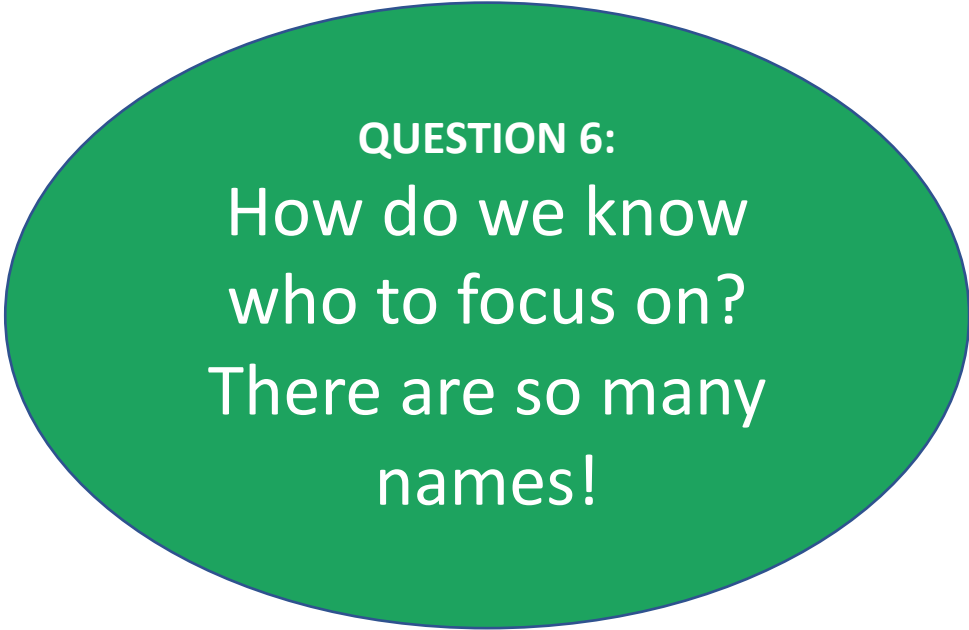
QUESTION 5:  
What is a basic way  
to look at donors?



# Get to Know Your Donors

- Look at your donors from high to low in terms of lifetime giving





QUESTION 6:  
How do we know  
who to focus on?  
There are so many  
names!

# Futures Research: Academy Donor Tiering

- Review the results of the Donor Research Exercise from the Spring

TIER	OVERALL STRATEGY
<b>Tier 1</b>	Determine top 50-100 prospects and cultivate for major gift effort.
<b>Tier 2</b>	Cultivate for mid-level giving opportunities with school leadership team and accelerate mail and online giving.
<b>Tier 3</b>	Cultivate for mid-level giving and school- based giving opportunities with school leadership team and accelerate mail and online giving.
<b>Tier 4</b>	Retain and grow giving through online and mail channels; select loyal donors to cultivate for major gifts and planned gifts.
<b>Tier 5</b>	Explore ways to retain and grow giving. Increase regular online communication.
<b>Tier 6</b>	

# Come Up With A Strategy for Higher Level Donors

- Sample donor matrix

	Less than \$99	\$100-\$250	\$250-\$500	\$500-\$999	\$1,000 +
<b>Thank You Email</b>	X	X	X	X	X
<b>Personal note from board member</b>			X	X	X
<b>Special seasonal greetings</b>				X	X
<b>Newsletter</b>				X	X
<b>Invitation for a private call</b>					X

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new Virtual Library being created at  
[www.catholicschoolsbq.org](http://www.catholicschoolsbq.org)*

We can help!

Please reach out to

[cap@futuresineducation.org](mailto:cap@futuresineducation.org) or  
[schoolsupport@futuresineducation.org](mailto:schoolsupport@futuresineducation.org)

# QUESTIONS & DISCUSSION







# Futures in Education

FOR BROOKLYN AND QUEENS

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*Changing Lives Through The Gift Of Education*

