

## FUNDRAISING AND ADVOCACY OVERVIEW

All committee members are solicitors for the Senior Parent Gifts Program, but most importantly, we are all relationship managers. We are reaching out to and connecting with other members in our CA community, and specifically within the Class of 2015, to provide other families with an opportunity to make a real impact on our school's future.

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### **Make your first contact**

The first call is always the hardest to make. Once you have received the profile sheets in the mail, you can get underway. Following up on the Senior Social, Parents' Weekend, and recent mailings may give you a natural entry point for conversation. Late October and early- to mid-November (pre-Thanksgiving) will be the critical outreach time!

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### **People give to people**

Personal solicitations are the most effective fundraising method, so please make every effort to have a personal conversation. If your goal is to schedule a phone solicitation, you may try to send an email message in advance to arrange for a convenient time to call. If you are trying to set up an in-person visit, call in advance to identify a day and time when both decision makers could be present for a meeting. If you can't connect on the phone, you might consider writing a personal note introducing yourself and telling them to expect your call.

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### **Start and end with a thank you**

It is always meaningful to initiate gift solicitations by giving thanks for past contributions to CA. While CA officially acknowledges every gift, a personal thank you is meaningful and important.

It is also important to say thank you as you close a conversation, whether you are thanking someone for considering a gift or for making a gift.

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### **People give to specific needs**

You will want to be familiar with the case for "The Faculty Leadership Fund: Advancing Teaching Excellence at Concord Academy", which was mailed to all senior families in September. The case represents the specific need we are targeting with this year's Senior Parent Gift.

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### **Ask for a specific amount or provide a gift range—and then wait**

Being specific in your gift request, rather than requesting a general contribution, is more likely to lead to a larger gift, therefore you will want to be specific in your wording. Examples may include:

*"Would you be willing to make a gift of \$X to support this legacy fund and honor your child?"*

*"Would you join us and consider making a leadership gift in the five figure range?"*

*"We were hoping that you would consider a Senior Parent Gift of \$X in recognition of your child's experience at CA."*

Once you ask, wait patiently for a response. Try to wait until an answer has been given. Try to listen to what is being said before attempting to address any concerns or questions that may be raised.

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**Ask about matching gifts**

Matching gifts from companies are added to personal gifts in determining a donor's total contribution. Companies will usually match gifts for the employee's spouse, as well as retired employees.

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**More than one call or contact is often required**

Many people will want to take some time to discuss their gift with their spouse, consider the amount of the contribution, and how to make it (i.e. cash, stock, etc.). Since families generally give more to the Senior Parent Gifts Program than their regular annual contribution, Senior Parent gifts, in particular, can require more time. Be prepared for a request for additional time and then arrange for a specific time when you will be back in touch.

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**Soliciting is a noble action**

Soliciting contributions for an organization you support is an admirable undertaking. Your volunteering to invite others to support the gift is a strong statement that you care about Concord Academy, the education provided here, and the impact it has had on your child (or children!). You should feel *terrific* about what you are doing! Your contacts with parents build relationships within the school community, as well. Please feel free to discuss other issues. Remember to share questions or concerns with the Advancement Office.

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**Following-up**

Regardless of the outcome, follow up on the contact. If your prospect makes a pledge, please send a thank-you note. If your prospect does not make a specific commitment, please set a date to speak again and obtain a conclusive answer.

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**Make your own commitment early**

It is much easier to ask others to make a contribution once you have made your own commitment. Explaining to other parents your reasons for supporting CA makes you a compelling solicitor.

## FREQUENTLY ASKED QUESTIONS, FREQUENTLY RAISED CONCERNS

### **Question: “Am I going to be asked for a Senior Parent Gift and an Annual Fund gift?”**

Response: “No, you are being asked one time only this year and that is for the Senior Parent Gift. 25% of your overall Senior Parent Gift will be directed to the 2014-15 Annual Fund.”

### **Concern: “That amount is much more than I had thought of giving.”**

Response: Ask if the parent could make a gift at the level you have proposed if it were spread over more than one tax year in several payments (e.g. they can pledge the full amount now, pay a portion before December 31, and the rest by Commencement), or if it were made through stocks or other securities. Do not immediately reduce the size of your request.

### **Question: “Will my small donation, a significant sacrifice to me, make any difference to CA?”**

Response: “Gifts of *all* sizes are extremely important. In fact, many major gift prospects and foundations look for strong overall support from the current parents and alumnae/i before they will commit to supporting CA. Because participation is *so* critical, one of our goals is to achieve 100 percent participation.

### **Concern: “I am paying multiple tuitions for several children at this time.”**

Response: “I understand. Many of us are paying more than one tuition and that is why it is possible to spread your commitment over three to five tax years. Your pledge will help convince others to give. Even a small amount matters.”

### **Concern: “We’re not interested in the Faculty Leadership Fund. We’d rather support the arts, etc...”**

Response: Try to explain the importance of supporting this project as a class and the legacy it leaves for future students. In addition, stress that this is not simply a gift to faculty support, but a gift to the school and to the school’s future because all students are impacted by the adults of the CA community. If they respond that they will only contribute on the condition that their gift support another objective, let the donor know that the Advancement Office can contact them to discuss their particular interest (then call Brendan and inform him of the specifics of the conversation).

### **Concern: “CA ....” (Complaint about the school)**

Response: Let the parent know that you hear their concern and would like to try to find an answer for them. Make sure you understand what they’re saying and arrange for a specific time to call back. Then contact Brendan and discuss the concern with him so that he can help you address the issue.

## GIVING METHODS

The tremendous participation of the past few senior classes has illustrated that the Senior Parent Gifts Program warrants special consideration and callers should approach their conversations with enthusiasm and patience. When you have a parent prepared to make a gift decision, you can take their pledge on the phone. Below is an easy reference guide:

### Checks

Checks are our most popular form of giving. Checks should be made payable to:

*Concord Academy*

Checks should be mailed to:

*Concord Academy*

*Senior Parent Gifts Program*

*166 Main Street*

*Concord, MA 01742*

### Gifts of Stock or Wire Transfers

If a constituent wishes to make a gift of stock or wire transfers, please refer her/him to:

*Advancement Services, (978) 402-2239, [hilary\\_wirtz@concordacademy.org](mailto:hilary_wirtz@concordacademy.org)*

Please note on the constituent's call sheet that she/he is planning to make a gift of stock.

### Matching Gifts

Many parents, grandparents, and/or their spouses are employed by companies that will match their gift to the school on a 1:1, 2:1, 3:1, or 4:1 basis. Please ask prospects if they work for a matching gift company.

Matching gifts are a wonderful resource of support for CA and can multiply the size of a donor's gift.

Matching gifts applications can be obtained from their employer and submitted to:

*Concord Academy*

*Senior Parent Gifts Program*

*166 Main Street*

*Concord, MA 01742*

Please record the total pledge on the call sheet as the amount the family/individual will pay themselves and then indicate the matching gift in parentheses next to the pledge amount (e.g. "Pledge amount: \$500 (Matching gift: \$500)").

### Credit Cards

CA accepts Visa, MasterCard, Discover, and American Express. This is a great tool to use, as it is a way to secure a gift instantly. If you receive a credit card donation, be sure to write down what type of card it is, the name as it appears on the card, the full account number, and the card's expiration date. You may want to read the account number back to the constituent to verify that all numbers are correct. Families can also donate online themselves at [www.concordacademy.org/giveonline](http://www.concordacademy.org/giveonline)

### Questions?

We're available to answer any questions you may have, provide support and feedback, as well as record any pledges or comments you receive from parents.

Brendan Shepard, Advancement Office, (978) 402-2258, [brendan\\_shepard@concordacademy.org](mailto:brendan_shepard@concordacademy.org)

**NOTES ON THE SPGP PROCESS**  
*(first created by SPGP volunteer Gordon Hoffstein P'03, '05)*

- 1) Introduce yourself
  - Parent of a CA student and volunteer status are KEY
- 2) Request “permission” to take some time
  - Do you have a moment to discuss...
  - If not: “When would be a better time that I can call back?”
- 3) Make a connection
  - I noticed...(something about their son or daughter)
    - Talk to your kids, see if they’re friends
    - See where their older children went to college
  - Connect as Senior Parents: college process, senior chapel, “How are you holding up?”
- 4) Segue to information on SPGP
  - Past tradition of SPGP (see history)—permanent legacy
  - This year’s gift
    - Supports the Faculty Leadership Fund: Advancing Teaching Excellence at Concord Academy
    - How important it is to support this project for CA’s future
    - “What a huge difference this will for the entire CA community.” (*What you see as essential impact*)
    - You think it’s a great idea because...(make it personal)
  - Senior Parent Gifts Program is different from the Annual Fund
    - Up to five tax years to pay
    - No additional request for Annual Fund this year—this is a campaign gift!
    - Of benefit: appreciated securities or other property
    - Family gift and other connections to foundations/matching
  - Our goals
    - “We want to send an emphatic message of gratitude and ensure our gift has the greatest impact possible. Already, a few families have stepped up in an extraordinary way to support this gift to the school.”
    - 100 percent class participation—“The last several classes set a high bar for us with 98 percent, 99 percent, and 100 percent participation.”
    - “As our class legacy gift, we want all families to be a part of this gift. Every family’s gift is important.”
    - A portion of the Senior Parent Gifts Program supports the Annual Fund and CA’s programs and operations “for our children’s senior year.”
- 5) Segue to ask (gift solicitation or a meeting to present SPGP)
  - This is where we need your help.
  - Every single donor is a leader.
  - It is important now more than ever to support the school as our day-to-day needs are not changing.
  - Ask in an upbeat (not apologetic voice).
  - “Will you and ‘spouse name’ join me in support of CA and this year’s SPGP by making a gift of \$X (target amount)?”
  - For families with targets of \$10,000 and up: “Would you consider a family gift of \$X?”

- **DON'T SPEAK UNTIL THE PARENT SPEAKS.**

6) Response to gift ask

- OK—
  - Thank parent(s) profusely and promise to follow-up with a pledge form.
  - Email Brendan with outcome.
  - Brendan will send a thank you and the pledge and gift form.
  - Send the parent(s) a thank you note.
- Wants to think about it (most likely scenario)—
  - Ask if there is anything you need to clarify.
  - Arrange for a time for a follow-up call; don't leave it open-ended for them to get back to you.
- No—
  - Probe (don't push) the issue and see if you can get them to reconsider.
  - Mention the time variable (i.e. up to three years).
  - Review the importance of the SPGP to the annual budget and to leave a class legacy.
  - Review the importance of 100 percent participation: *"I understand what you're saying. Can we count on you to at least participate?"*
  - Suggest that you call a week hence to review their decision.

7) Miscellaneous thoughts

- Don't leave your message on an answering machine...it's not a great first impression.
- Try to always arrange a time when you can call back. If the parent insists they will call you and don't, call them back in one week.
- Keep good notes on every contact. You want every parent to think they are the most important parent, so show them you are listening to their issues and concerns on your call back.
  - "When I spoke with you last week you mentioned you needed to meet with your financial advisor before you made a decision on SPGP...how did that go?"
- **Enthusiasm is contagious.** If YOU are enthusiastic and supportive of CA and the SPGP, that will resonate with the parent(s) you are calling.

**REMEMBER**

- Call or email Brendan if you feel you need additional information prior to an initial call.
- Report and keep Brendan informed of your progress.
- Report verbal pledges so Brendan can send the parent(s) a pledge and gift form.
- Send your personal thank you.
- Use Brendan or the co-chairs as sounding-boards for follow-up strategies.