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# Getting Strategic About Advancement Goals



Connolly Educational Consulting

# Welcome!

**I'm Joe Connolly**

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**Tell us who you are!**

**What brought you to this session?**

# What we will learn today

Fueled by an innovative advancement model, we'll tell the story of how to foster growth by creating strategic plans for enrollment management, development and marketing.

We'll learn the strategic framework and tools, and guide audience members to extend and strengthen their own strategic efforts to achieve advancement goals in their schools.

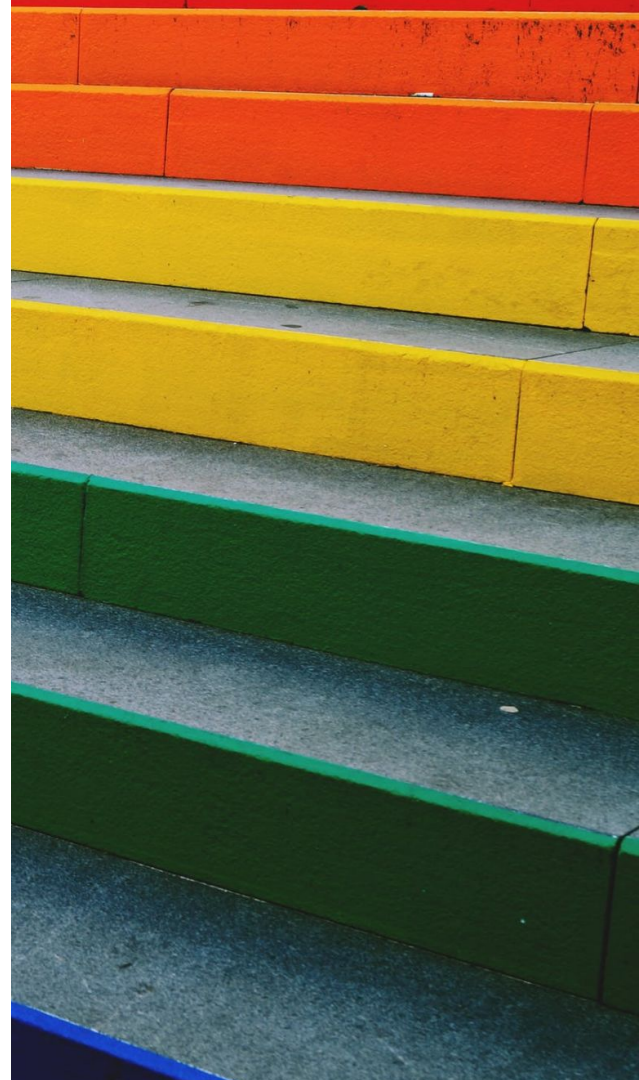


# The 3 Step Plan

Agree on a Shared Mission

Get Organized! Create Collaborative Strategic Plans

Implement a Project Management Tool to ensure the collaborative execution of each plan



# Collaboration Drives Strategic Efforts

## *The Entire School Makes an Impact*

### **Head of School, Administrators & Faculty**

Leadership  
Attrition Watch  
Student Visits  
Open Houses  
Assessing Students  
Community Building  
Cultivation and Ask  
Stewardship  
Storytelling

### **Admissions**

Enrollment  
Retention  
Recruitment  
Marketing

### **Advancement**

Objectives  
Key Performance Indicators  
Goals  
Strategies

### **Communications**

Access to Community  
Social Media Outreach  
Storytelling  
Targeted Communications Strategies  
Marketing

### **School Parent Council**

Class Captains  
Parent Ambassadors  
Word of Mouth  
Community Building

### **Board's Role**

Leadership  
Cultivation and Ask  
Word of Mouth

# Step 1 - The Shared Vision

Admission, marketing and advancement teams should agree on a shared vision to **fill and fund the school.**





# Collaboration with Admissions

- Knowing prospective families
- New Family Profiles
- Access to New Families



# Creation of New Family Profiles

## Admissions Input

- Factual and Background Information
- “School Involvement”
- “Contribution to Community”

## Prospect Research

- iwave and ResearchPoint – Wealth Ratings, Real Estate & Giving
- LinkedIn – Career & Education
- Google Search – Interests and More
- Photos – Super helpful for Review Before Events
- After Meeting Information – Family Priorities
- Grandparents

# Example of New Family Profile

Family: Jones

Child/Student Name:	Cindy, Joe
D.O.B of student:	12/20/2012
Entering Grade:	2nd, 3rd
Address:	123 Happy Lane, San Jose, CA 95125
Father Email:	jonedoe@gmail.com
Mother Email:	janedoe@gmail.com
Languages Spoken:	English, Spanish
Sending School:	Happy Day Elementary
Parents Name(s):	John Doe, Jane Doe
Parent Employer:	John: Partner at XYZ Software Jane: VP of Finance at Platform Consulting
Sibling:	Joe, 6 years old
Special Notes:	Referred by the Jackson Family
Grandparents:	Jane and Joe Jones, 415 Mountain Road, Austin Texas



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**Family/Student Interest:** We are an active family and we love to travel. We also love to camp and get closer to nature. We are an active family - we enjoy spending time outside. Steve and I also compete in various events (cycling and tennis); we feel that supporting each other through training and competition is important for all members of our family, especially Cindy and Joe. We also enjoy weekly activities, such as Friday movie/game nights, Saturday homemade pizzas, and walks in our neighborhood with our dog, Bella.

**School Involvement:** (Joe) I am very fortunate to share this responsibility with my wife and Cindy and Joe's tutor/nanny. Day-to-day they are fantastic ensuring that he is getting his homework and studies done. I would characterize my role as a life coach, helping him see the privileges he has as well as the opportunities that are afforded to him in this time in history and location in Silicon Valley. (Jane) My husband, our nanny Nora, and I have employed a consistent philosophy as it relates to Cindy and Joe's school and life. We want to expose the kids to as many different situations as possible.

**Contribution to Community:** (Joe) I currently serve on the kid's School Board / Site Council working with the Principal to evaluate the effectiveness of supplemental education funds supplied to the school and working with her to assess the safety and security of the school grounds. I would welcome opportunities to serve in a similar capacity at Hillbrook. Additionally, as a consultant in high-tech, it would be fun to see if there is an opportunity to align some of my experiences to any business curricula, coursework, or case studies. (Jane) I enjoyed volunteering at Ashton's school, helping in various areas: classroom help, garden docent, and field trip parent. I would be open to helping in these areas, or could also help in areas nearer my profession in Finance: budget, planning, organization, etc.

## Development Information:

**Education:** Joe - University of Montana, BS in Finance Jane - BA from Carnegie Mellon and MBA from Haas

**Career:** Joe - XYZ Software for almost 4 yrs, prior to that PWC for 2 years Celeste - currently at Platform Consulting as VP of Finance for 9 months, previously at Apple for almost 5 years

**Home:** Purchased home in 2012 for 1.2m ( financed 920K)

**Wealth/Philanthropy indicators:** Joe- ranked a power spender most likely based on being a partner

# Collaboration with Marketing

## Marketing Plan

### Inbound Marketing

- Articles/White Papers
- Eblasts
- Automated Emails to Inquiries through SchoolAdmin
- Blog Posts
- Podcast

### Public Relations

- Article Placement in local publications
- Speaking engagements

## Example of a Yearly Marketing Plan

[illegible]

# Collaboration with Marketing/Communications

A communications tree is put in place for every major project of event.

fx Save the Date and tickets go on sale next week

	A	B	C	D	E	F	G
1	Who	When	What	How			
2	HB/Parent Community	December 13	Announcing Auction Theme, Save the Date	Hillbrook Happenings			
3	HB/Parent Community	January 10	Save the Date and tickets go on sale next week	Hillbrook Happenings			
4	HB/Parent Community	January 16	Auction microsite updated and live	Microsite managed by Nicole, Megan/Hillbrook Happenings			
5	HB/Parent Community	January 16	Internal Bear's Lair Auction page updated and live	Bear's Lair updated, Hillbrook Happenings			
6	HB/Parent Community	January 16	External Auction page updated and live	External Auction webpage			
7	Parent Community	January 31 and February 7	Silent and Live Donation Items? Students ads due February 9 then 16	Hillbrook Happenings			
8	Parent Community	February 11, 25	Auction Parties highlighted by grade level	Grade Level Parent Emails			
9	Parent Community	February 4, 2017	Final message in TWA: Auction Basket items due?	Grade Level Parent Emails			
10	Internal/External Community	February 5, 2017	Donation Day? One day campaign?	Social Media Campaign			
11	Parent Community	Sunday, February 25th	Class Basket Items/Volunteers	Grade Level Parent Emails			
12	Parent Community	Wednesday, February 14th, 27th, and March 6th	Auction Parties	Hillbrook Happenings			
13	Parent Community	Wednesday, February 28, March 7, and 14	Class Basket Themes & Items	Hillbrook Happenings			
14	Parent Community	Wednesday, February 28, March 7, and 14	Ticket prices increasing (on Friday, March 10th)	Hillbrook Happenings			
15	Parent Community	Monday, March 5 and 12	Class Basket Building Party (March 15, 2017)	Grade Level Parent Emails			

# Step 2 - Create Collaborative Strategic Plans

Strategic Effort	Why?	How Effective?

# Strategic Efforts

Strategic Effort	Why?	How Effective?

- By calendar year
- Take a few minutes to think of a strategic effort you're working on
- Think strategically about the gaps you see



# Measuring Gaps in Strategic Efforts

## Start by analyzing your data

- Year to date annual giving results
- Dashboards
- Surveys
- Etc.

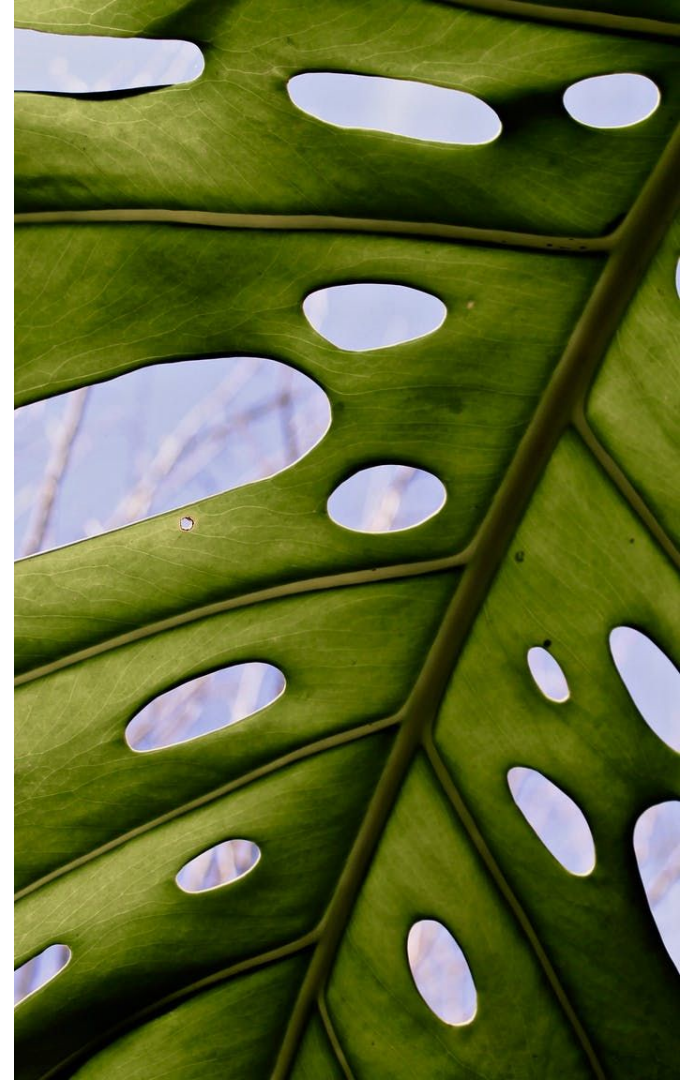
## Important questions to ask about your current efforts:

- Does it reflect our school?
- Is the purpose and communication clear?
- Does the timing make sense?
- Should you be doing it all?

# Gaps in Strategic Efforts

**Examples of potential gaps, things you could be doing better:**

- Outreach to new families
- Utilization of class captains
- Utilization of board members
- Stewardship efforts
- Retrospective vs. prospective efforts
- Diversity & inclusivity efforts
- Follow up efforts
- Automation vs. personalization efforts
- Retention efforts
- Forecasting efforts



# Outreach to new families - Strategic Efforts

Strategic Effort	Why/What/How?	How to Measure:
"Philanthropy at Hillbrook" evening event	<ul style="list-style-type: none"><li>• Education families on giving culture and financial model</li><li>• Earn the right for an ask</li></ul>	<ul style="list-style-type: none"><li>• Annual giving metrics</li><li>• Feedback from new families</li></ul>
Direct outreach by Head of School and Director of Development	<ul style="list-style-type: none"><li>• Personal touch</li><li>• We get to be the narrator of our story</li><li>• Make people feel welcome</li></ul>	<ul style="list-style-type: none"><li>• Annual giving metrics</li><li>• Feedback from new families</li></ul>
Stewardship plan	<ul style="list-style-type: none"><li>• Personal touch</li><li>• Consistency</li><li>• Set up for the next gift</li></ul>	<ul style="list-style-type: none"><li>• Annual giving metrics</li><li>• Feedback from new families</li></ul>

# Marketing/Word of Mouth - Strategic Efforts

Strategic Effort	Why/What/How?	How to Measure:
Targeted influencers within the community	<ul style="list-style-type: none"><li>•Parent Ambassadors have access and knowledge</li><li>•Families with local businesses have reach</li></ul>	<ul style="list-style-type: none"><li>•Increased applications</li><li>•Feedback from current families</li><li>•Inquiry forms</li></ul>
Admissions related blog posts	<ul style="list-style-type: none"><li>•Asked current families to like, comment and share posts</li><li>•We get to tell our story</li></ul>	<ul style="list-style-type: none"><li>•Traffic on website and social</li><li>•Increased applications</li><li>•Feedback from current families</li><li>•Inquiry forms</li></ul>
Handwritten thank you notes	<ul style="list-style-type: none"><li>•Think of a referral as a large gift to our school</li><li>•Stewardship</li></ul>	<ul style="list-style-type: none"><li>•Increased applications</li><li>•Feedback from current families</li></ul>

# Strategic Advancement Plan

## Annual Fund

### Objectives

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### Key Performance Indicators

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### Goals

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### Strategies

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# Example of Advancement Plan

## Annual Fund

### Objectives

- To maintain a strong annual giving program through active recruitment of volunteers, better use of the Advancement Committee, the Board and more targeted cultivation/stewardship of major donors.
- Evaluate donor pool to identify possible families to commit to an annual giving goal.

### Key Performance Indicators

- Total budgeted goal
- Parent goal – continue to focus on bringing in new families at a “meaningful” level...

# Step 3 - Agree on and implement a Project Management Tool

- Helps to ensure collaborative execution of each strategic plan
- At Hillbrook we chose Trello



# Example of Advancement Plan

The screenshot displays a Trello board named "Development" with a background image of a beach. The board is organized into four columns, each representing a different project or task area. Each column contains a list of tasks, each with a title, a due date, and assigned members.

- Column 1: Annual Fund Ongoing**
  - Update Pledges on a Weekly Basis through November 1, 2018 (Assigned: CT, 1 comment)
  - Process Checks and Cash as they are received through June 30, 2019 (Assigned: Jun 30, 1 comment)
  - Storyboard the Video for Annual Fund...publish #GratitudeTuesday (Assigned: Nov 27, 2018)
  - Process Online Payments and Pledges on a Daily Basis (Assigned: JJ)
  - Matching Gift Inquiry and Follow Up (Assigned: 1 comment, 1 edit)
  - Create June Follow up for Annual Fund (Assigned: Jun 3)
- Column 2: Prepare for Benefit**
  - Print the Catalog (Assigned: Feb 28, 1 comment, 0/3 progress)
  - Help with other Procurement Items (e.g. Disney, Corevolution, etc...) (Assigned: EG, JJ, 1 comment, 1/4 progress)
  - Silver Party Planning and Logistics (Assigned: 1/4 progress)
  - Donor Lists for Benefit portion of Annual Report (Assigned: Jun 28)
  - Outreach on Matching for Benefit and Stand Up for Students (Assigned: Apr 19)
  - Complete Sales Tax Analysis for Holly by April 17, 2019
- Column 3: Grandparent's Day Support and Mailing**
  - Nametags, Maintenance and Catering Support for Special Morning with Mark Silver (Assigned: Nov 13, 2018, DM)
  - Holiday Card mailing (Assigned: Dec 10, 2018, 2 comments)
  - Merge Grandparent Cards and strategize on name tags, etc... (Assigned: Nov 13, 2018)
  - Grandparent Day Reschedule and Donation Ask Letters (Assigned: Dec 7, 2018, 2 comments, 6/6 progress)
- Column 4: Capital Campaign**
  - Fall Approach to last year's new families (Assigned: Sep 10, 2018, 1 comment, 1 edit)
  - Prepare invitation list (Assigned: Aug 24, 2018, 1 comment)
  - Work with Shannon on pre-invitation e-mail (Assigned: Aug 28, 2018)
  - Send invitation to dinner at the Scott's home at the end of September (Assigned: Sep 4, 2018, 1 comment, CT)
  - Update the CC giving pyramid and add names and amounts (Assigned: Sep 26, 2018)

At the bottom of each column, there is a button to "Add another card".



# Example of Enrollment Management Plan

### June Enrollment Items

Lower School Middle School

Review enrollment targets and projections

⋮

Lower School Middle School

Confirm enrollment, rollover in Whipple Hill and spreadsheets

🕒 Jun 25, 2019

Enrollment Lower School Middle School Jami

New family profiles (development)

🕒 Jul 24, 2019 ⋮ 1 1/6

Lower School Middle School

Create Parent and Student Interview Forms

🕒 Aug 16, 2019 ⋮ 1

Lower School Middle School

Attend AISAP conference and complete certification

🕒 Jul 27, 2019 ⋮

+ Add another card

### June Retention Items

Lower School Middle School

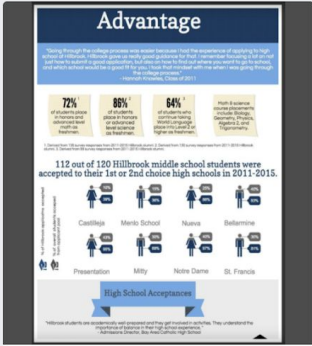
Exit interviews with families not returning - Ellen Bell

⋮

Lower School Middle School

Share exit interview results and outline 12 month retention efforts

⋮



**Middle School**

Begin program planning for Middle School Experience event

+ Add another card

### June Recruitment Items

Lower School Middle School

Frequent communication with Ed consultants and relocation agencies

⋮

Lower School Middle School

What local summer events can we participate in? Parents to help?

⋮ 1 1/4

Lower School Middle School

End of year analysis and planning (including demographic research, Ed fairs, feeder school visits, contacts)

⋮

Lower School Middle School

Prepare targeted Open House postcard mailing

⋮

Lower School Middle School

Confirm continuing Parent Ambassadors; update materials

+ Add another card

### June Marketing Items

Lower School Middle School

Review marketing plan

⋮

Lower School Middle School

Summer wish list items: iPad app, etc.

⋮

Lower School Middle School

Update admission materials

⋮

Lower School Middle School

Re-order Hillbrook logo items for Admission

🕒 Aug 16, 2019 0/7

Lower School Middle School

Take a look at Market View

⋮

+ Add another card

### August Items

Lower School Middle School

Move active inquiries from 2019-20 to the new admission season

🕒 Aug 30, 2019 ⋮

Lower School Middle School

New Student Outlooks (faculty)

🕒 Aug 9, 2019 ⋮ 1 1/1

Lower School Middle School

Plan new family Q&A (Hillbrook 101 event)

🕒 Aug 21, 2019 ⋮ 2/6

Lower School Middle School

Meet with faculty at retreat about admissions culture - we're all in this together

🕒 Aug 19, 2019 ⋮ 1 2/3

Lower School Middle School

Attend New Family Cocktail Reception

🕒 Aug 22, 2019 2/3

+ Add another card

# Example of Marketing/Communications

The screenshot displays a Trello board for 'Communications / Marketing'. The board is organized into five main columns, each representing a different project area. The top navigation bar includes a search bar, a 'Boards' tab, and a 'Trello' logo. The board's name is 'Communications / Marketing', and it is shared with the 'OAE Team' (Free). The board is visible to the team and has 12 members (JC, AY, CC, CT, DM, +12). The board is organized into five main sections, each with a title and a list of cards:

- Social Media**
  - Facebook Post: Digital Music in 1st Grade - Quote from Emily H. (May 15, 3 comments, 2 likes)
  - Instagram Post: Hub wall goes up video (May 15)
  - Facebook: Take a self-guided gallery walk of The Hillbrook Art Show, featuring junior kindergarten-8th grade student work in fine and digital arts! #discoverHillbrook
- Admission**
  - Admission/Comm Strategy for 2019-20 School Year (Jun 10)
  - SchoolAdmin E-Blast Planning & Resources (1 comment, 2 likes)
  - "Apply to Hillbrook" Resource Button Live on Resource Board - Expires 12/13/19 (Sep 2, 1 comment, 1 like)
  - Open House Event Prep: Confirm that Admission has current Graduate Video (as file) and iPhoto
- Communications/Publications**
  - Present Hillbrook Quarterly Stories to Joe, Mark, and Group (May 3, 2 comments, 1 like)
- Publications**
  - Flag Jokes on Bear's Lair (Dec 31, 2998)
  - Neighbor Newsletter - May 17, 2019
  - Annual Report - July 2019
  - Hillbrook Quarterly - June 15 (Jun 14)
  - Student Choice, Student Voice MS RBB
  - Hillbrook Quarterly: Edit team receives stories via Google Docs (Jun 3)
  - Hillbrook Quarterly: Editing team completes all proofreading and edits as suggestions (Jun 7)
  - Annual Report Copy & Photo
- Projects - Development**
  - Auction photos - Alumni helpers - Vidigami?
  - Revamped or Re-Imagined Stand Up For Students Video/Benefit Invitation/Impact of Benefit (6 comments, 1 like, 0/3 likes)
  - Grandparents & Special Friends Day Communication/Engagement Designations (1 comment, 2 likes, 0/5 likes)
  - Benefit Newstop - 8th Grade Role in Benefit (Mar 20, 2020, 1 comment)
  - 8th Grade Benefit Communication (Pushpage or Newstop?) (Jan 21)
  - Kindergarten Requested Benefit video shown at Flag for later this

# Strategic Project Management

The screenshot displays a Trello board titled "OAE Planning Board" with a search bar and navigation icons at the top. The board is organized into four columns representing the months of June, July, August, and September. Each column contains a list of project tasks, each represented by a card. Cards include details such as due dates, assignees (indicated by initials in circles), and progress bars. The tasks are as follows:

- June:**
  - Send out updated receipts for any additional Benefit items purchased in the last few months. (Due: Jun 28, 0/3, Assignees: CC, EG, JJ)
  - Welcome Bags for families admitted after 4/25 (Due: Jun 28, 2 comments, 17/20, Assignees: AY, DM, EG, JJ)
  - Professional Development Sheet for Admission USBs/Walkathon Usage - First Look at Design & Confirm Direction of Design (Due: Jun 28, 8 comments, 2 attachments, Assignees: JJ, JC)
  - Blackbaud rollover - getting students in from School Admin (Due: Jun 25, 1 comment, Assignees: AY, CT, DM, JJ, OB)
- June Done:**
  - Middle School Awards, 8th Grade Recognition Ceremony (Due: Jun 3, Assignee: CT)
  - 8th Grade Graduation Ceremony (Due: Jun 4, Assignee: CT)
  - Online Reputation Management: Niche Profile Information Update Deadline for the 2019-2020 School Year (Niche Deadline June 15, 2019) (Due: Jun 12, 3 comments, Assignees: JJ, JC)
  - Task: Select Photos for the 2018-19 Annual Report (Due: Jun 21, 4 comments, 1 attachment, Assignees: CC, DM, ES, JJ)
  - New Family Picnic (Due: Jun 15, 0/2, Assignee: JJ)
- July:**
  - Update admission material - USBs (4 comments, 10 attachments, Assignee: JJ)
  - Plan new family Q&A (Hillbrook 101 event) (Due: Aug 23, 0/5, Assignees: JJ, JC)
  - Plan Fall Welcome New Families of Color Event (Due: Jul 3, Assignees: JJ, JC)
  - Annual Report: Finalized/Approved Content and Photos Delivered to 2 Communique (Due: Jul 3, Assignees: JJ, JC)
  - Advertising Materials - SEO (Start SEO in July?) (Due: Jul 8, 1 comment, 1 attachment, 0/3, Assignees: CC, JJ)
  - Alumni Celebration Save The Date Postcard: Copy Sent to Don for update and then printed by Medius (Due: Jul 8, Assignees: CC, JJ)
- August:**
  - Share and brainstorm Senior Admin Communication Calendar (Due: Aug 5, 1 attachment, Assignee: JC)
  - Hillbrook School at the Los Gatos Block Party (Due: Aug 8, 1 comment, Assignees: AY, JJ, JC)
  - Prospective Project- Kick-off Meeting to Create a Curriculum Guide (Ilsa/Colleen/Team Leads/Division Heads) (Due: Aug 5, 1 attachment, Assignee: JC)
  - Input new student birthdays into 2019-20 list (Due: Aug 16, Assignee: DM)
  - Begin program planning for Fall Open House (Due: Aug 16, Assignee: JJ)
- September:**
  - Annual Report: Final approval of publication from Margaret/auditors/Hillbrook team (Due: Sep 6, Assignees: CC, JC)
  - Annual Report Project Complete: Printing House sends Annual Report to mailhouse by September 6 - Annual Report Mailed (Due: Sep 6, Assignees: JJ, JC)
  - Kick off Brainstorm Meeting for Hillbrook Donation Day with Cathy, Erin, & Jami (Due: Sep 16, 0/3, Assignees: CC, ES, JJ)
  - Hub Opening? - Communications needs based on this (Due: Sep 16, Assignees: CC, ES, JJ)
  - Annual Fund Thank You Card Shooting/Design (Confirm with Development) (Due: Sep 16, Assignees: CC, ES, JJ)

At the bottom of each column, there is a button to "Add another card".

# Questions? Want to connect?

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Connolly Educational Consulting

# About ToucanTech

ToucanTech is an easy, affordable and beautiful fundraising CRM and website software to manage your supporter records, email newsletters, online payments, events, mentoring, careers and more!



## Any questions?

Please contact Georgia –  
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