

Strategic Fundraising

Valerie Barclay, Co-Head of School
Van Lunen Fellow 2012-2013
South City Community School, St. Louis, MO
www.sccommunityschool.org
Consultant: Don Distelberg



What I did:

South City Community School is a young school in its third year. The school is growing rapidly, having tripled since our first year. Our goals for this year were to increase and strengthen the financial stability of the school, particularly to move us from raising support for the current year to raising support for the following year.

My Van Lunen Consultant was Don Distelberg, who provided incredibly valuable advice, encouragement, and accountability for me through this process.

Prior to Van Lunen, we had developed a 3-yr Strategic Plan for Fundraising & Marketing, which we have then revised each year since the school opened. Don helped us to hone this Strategic Plan for fundraising activities including the following:

We had just begun monthly “SCCS Story” tours for potential volunteers / advocates / supporters (loosely based on the Benevon model of mission-based fundraising), which Don was familiar with and encouraged us to continue alongside the addition of other fundraising activities. We developed a “Quick Facts” sheet about the history, stats, and need for the school, and included this as well as a Wish List of various items and our brochure for each Story Tour participant. (We additionally used this material for various support-raising meetings, grandparents’ day, etc.).

The most “radical” activity for our school board was the addition of a “phone-a-thon” followed by a fundraising letter, which Don strongly encouraged us to do, and was completed in late November / early December. After initial push-back I was able to activate half of the board to make phone calls to grandparents and other previous or potential small to medium (under \$1000K) supporters. (The other half of the board worked on bylaws revisions which were also needed at the time! There was no question for any member about which group they wanted to volunteer for 😊.)

Don also heavily advocated for developing relationships with current supporters outside of the context of an “ask”... visiting them after surgery, contacting them after a loved one’s death... and after some thought and consideration for my relationship with several supporters and our context, I believe I was able to pursue them in a way that was authentic and sincere. Additionally, I made new efforts to connect on a regular basis with prospective supporters, to really work on establishing these relationships to provide day-to-day stories and opportunities for fun ways to see the school (our Christmas Program, Trivia Night, and Arts Festival, or weekly volunteering, among others), and thereby encouraging them really care about and “own” our school.

SCCS had applied for grants before, but had lost out on several opportunities to apply for grants last year due to miscommunication and poor planning among our board. Don encouraged us to make a renewed effort towards grant applications, seeing these as particularly important and relevant to us as an inner-city school, and gave me frequent reminders by asking about the status of these. As a result, we applied for 7 grant applications this year, ranging from \$2K to \$10K each.

Our school is also an active member of the Christian Schools Association of St. Louis’ which this past year collaborated together to open a new Ditto “upscale resale” shop in town, with the store “manned” by volunteers from the 7 schools involved and plans for store profits to be distributed evenly to each of the schools. Consequently, we also made a concerted effort to promote Ditto to our school families and required them to serve a set number of shifts per year (two required and more recommended; the actual need is approximately 3.25 shifts per family), with a goal toward real profits coming to our school and the other six involved within the next two years.

What did I learn?

Individually, most of these fundraising efforts brought some kind of impactful result, but the most impact evident was through the combination of all of these efforts.

Gaining the support and “ownership” from the board for two major fundraising tasks proved immensely helpful; namely, the Story Tours which were hosted by a different board member each month who then invited 8 – 10 of their friends to the tour, and the “phone-a-thon” for direct solicitation before the end of the year.

Additionally, having parent volunteer help with other fundraising tasks was crucial, given the other “hats” I wear and my limited time. A mom with a sales background assisted me with developing the fundraising update letter with response card that we sent out shortly after the “phone-a-thon”. A team of 12 parent volunteers helped this year with the planning and implementation of our 3rd Annual Trivia Night (having grown from just 5 volunteers last year). Another mom and board member took ownership of collaborating with the Ditto Store, acting as our school’s “Liaison” to the store and generally promoting the need for service to our parents and scheduling “sorting parties” to promote an easy way to get over to the store to experience the fun of serving.

Especially given our economy and the realities of heading an inner-city private school, my position will continue to require a dedicated and broad effort towards fundraising, will need to heavily rely on volunteers to accomplish this, and will likely eventually grow to need more dedicated staff support towards this task as well.

Don’s suggestions were extremely helpful and fruitful. Even more than that, the accountability of “reporting in” each month was a driving factor that I tremendously benefited from and I discovered that I need to look for another mentor / advisor who can serve this role for me in coming years.

Challenges to the work:

- Time, staff / budget constraints and more time! The biggest challenge to fundraising for our school is limited time and limited support staff (i.e., budget constraints for more support staff or more time for existing support staff). I wear many different hats at our small school and have limited support staff. Finding assistance through volunteers and our board was essential, as well as having the accountability from a mentor to “force” me to carve out time for this. As our school grows I would project that our budget (and fundraising capability) will increase to allow for more support staff to assist with fundraising tasks or free up more of my time to devote to this... or at least will ensure that we can keep pace with the growth and expansion.

Positive Changes:

- Honed and strengthened a 3-year Fundraising Strategic Plan; provided a solid framework to continue expanding that beyond the third year of our school.
- Initiated a phone-a-thon aimed at grandparents and previous small donors, followed by a fundraising letter, increasing our end of year giving by \$4K
- As a result of promoting Ditto and the need for support, as well as promoting our needs through phone-a-thon, grandparents day, etc., we saw a tremendous increased awareness regarding the financial needs of the school, within our community of board members, parents, and supporters. As a secondary result, we saw:
 - participation increased for our Annual Trivia Night, resulting in 8 committee members, 8 event volunteers, 152 participants (up from 104 last year and 48 the previous year), a fun night of community building that is still being talked about, and \$5K in profits
 - tangible item donations increased (including two iMac computers, a wide laminator, and play equipment)
- Established relationships with several significant donors who will continue to be partners to the school
- **Increased grant applications from 2 or 3 in previous years to 7 this year. \$10K from one application has already been awarded, three have been denied, and three are still pending (as of 6/3).***
- **Raised the \$25K needed for the current year and have currently raised \$22K for next year. This is a 165% increase from last year and represents our first shift to raise money for the year ahead.***
- **Due to the fundraising success and broadened needs of the school, we expanded our fundraising goal for next year to \$41K to include a new laptop lab and two additional interactive whiteboard systems (grant applications for all are currently pending).***
- **In addition to the fundraising efforts for Annual Fund, we received notice in December that SCCS may remain in our current space long-term, and hence have now concurrently began work towards a Capital Campaign (likely ~\$100K) for building improvements. We have received an initial \$7800 gift towards this.***

* see chart following

