

# The Brook Hill School

Bullard, TX

Rod Fletcher, Headmaster



## Project Summary

Typically, independent schools have financial needs above and beyond the scope of annual income streams (tuition, profit centers, endowment interest, etc.) Because of this fact and because independent schools are not-for-profit, raising funds from private donors is appropriate, necessary, and essential. This plan incorporates practices and innovative ideas for identifying new donors, assessing their wealth, and effectively cultivating them so that they are ready to be asked for a donation.

This plan provides practical strategies for an independent school development office to implement. The strategies for identifying donors and assessing their wealth are universal and should be consistently applied. The strategies for cultivating individual donors should be scrutinized and used if they fit a particular situation.

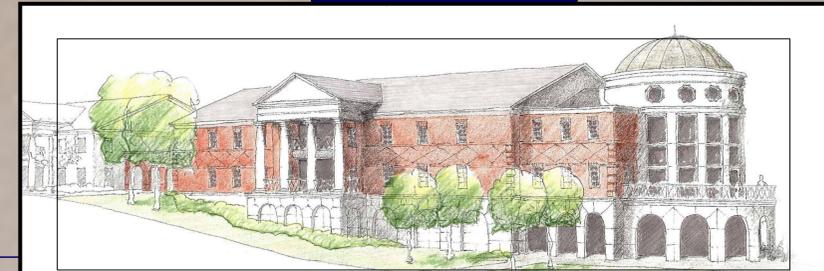


## Identifying Major Donors

- What is the value of their home? (Zillo.com or a local tax assessor can be helpful in finding this information)
- Do they own a second home?
- What is their occupation? (Is it high paying?)
- What is their income?
- Do they own their own business?
- Do they pay full tuition? For multiple students?
- Do they pay the entire tuition at once at the beginning of the year?
- What type of car do they drive?
- Do they serve on a board of a not-for-profit?
- Do they have a giving history of the school? At what level?
- Has their giving level to the school increased?
- Are they giving to other not-for-profits? (Look at other institution's annual reports.)
- Do they serve on the board of a foundation?
- Do they own real estate?
- Is their family wealthy?
- Do they vacation regularly? Where?
- Are their friends wealthy?

## Cultivating Major Donors

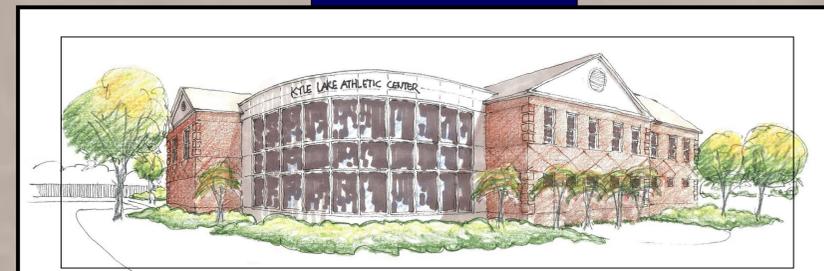
- Regularly take them out for a meal and update them about the school (and if appropriate about the campaign.)
- Visit them at their home or office to give updates.
- Invite them to school events (meet and greet them when they arrive and be aware of them until they leave.)
- Send them regular updates about the school and the campaigns via the mail and e-mail.



HUMANITIES BUILDING



LOWER SCHOOL



ATHLETIC CENTER

(Cultivating cont'd)

- Include them on any mailing list that they will let you. (Getting them information is essential.)
- Thank them regularly for their gifts, their attendance at school events, and meeting with the development office. (And whatever else you can find to thank them for.)
- Give them meaningful tokens of thanks. (Pictures, notes, student artwork, etc.)
- Introduce them to impressive students.
- Send them thank-you-notes and school updates from students.
- Invite them to special events or trips outside of the school to thank them and get time alone with them.
- Find out what aspect of the school "pushes their buttons," and make sure they interact with it. (Sports, Arts, students, programs, etc.)
- Give them Christmas gifts and recognize their birthday.