



# *Potter Development Services*

Helping public school districts build a *Culture of Support*

# **Creating and Growing School Development Programs & Endowments**

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**A Vision for the Future**

# **Getting Serious About Building an Alumni Support Program for Your District**

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**One Piece of the Puzzle**

# Reason

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- A “Perfect Storm” is brewing – here!
- New funding sources are no longer optional
- Prediction: All school districts will have to build alumni development programs
- If you don’t do it...

# Alumni Development

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It works for ...

- Colleges and Universities
- Prep Schools
- Parochial Schools

**Why Not Public Schools?**

# Right NOW Your Alumni are ...

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- Connecting through Social Media
- Being asked for million \$\$ gifts
- Doing estate planning
- Arranging charitable bequests
- Wanting to make a difference; i.e., leave a legacy

**And chances are...  
you are NOT in their thinking!**

# How can this be?

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- You have the most important cause in town
- Giving to education rates high
- You have a huge resource – 1,000's of living alumni
- Hometown nostalgia

**It's time to tell your story!**

# The Goal

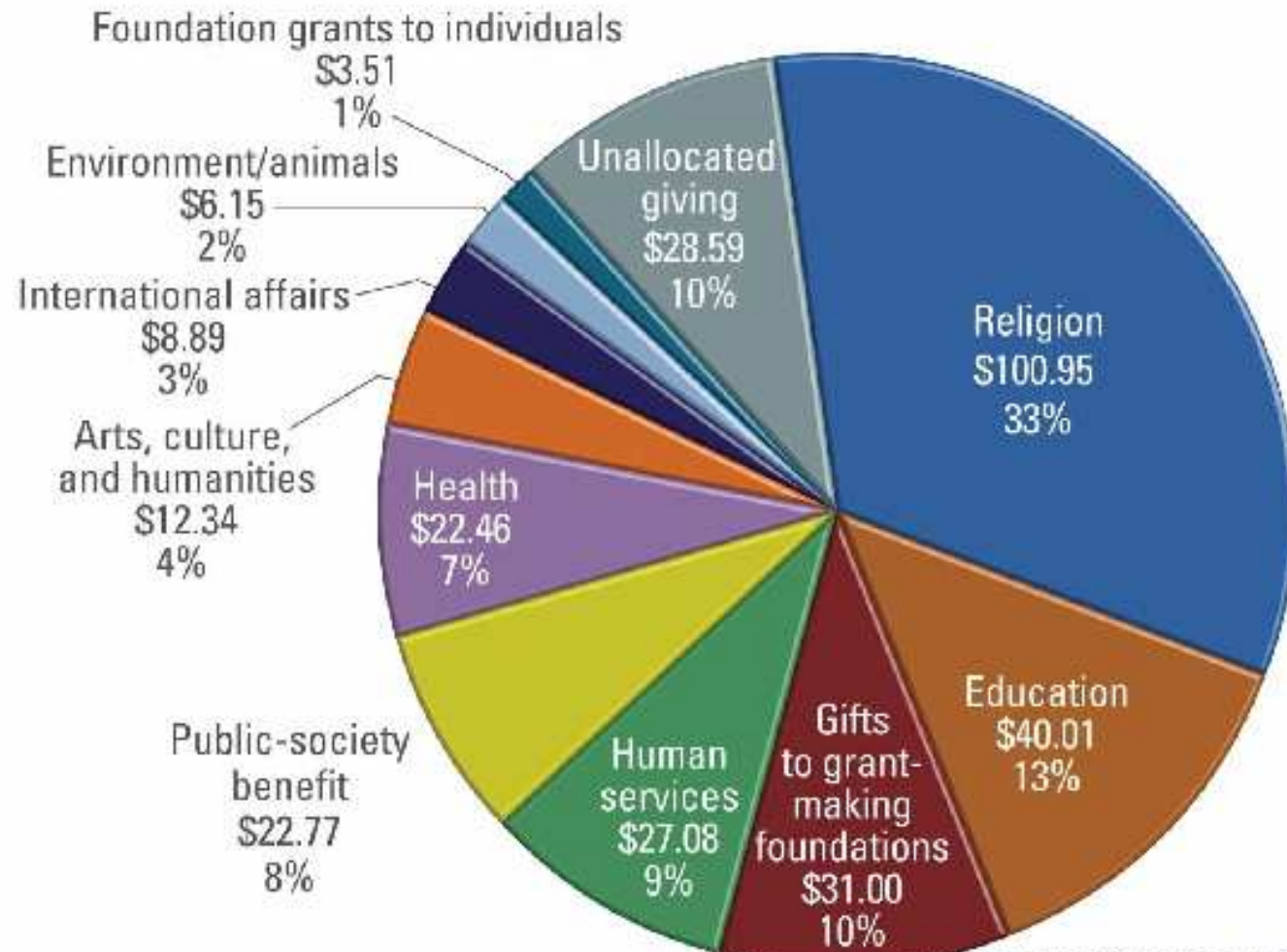
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**Build a Culture of Support!**

# Where the Money Goes (2009)

Total = \$303.75 billion

(\$ in billions – All figures are rounded)



Source: Giving USA Foundation/ Giving USA 2010

# Giving to Education, 1969-2009



Source: Giving USA Foundation/ *Giving USA 2010*

# Your Alumni

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- Are a potential asset
- Need a little love
- Will give support
- Can make a HUGE difference

# Alumni Will Support

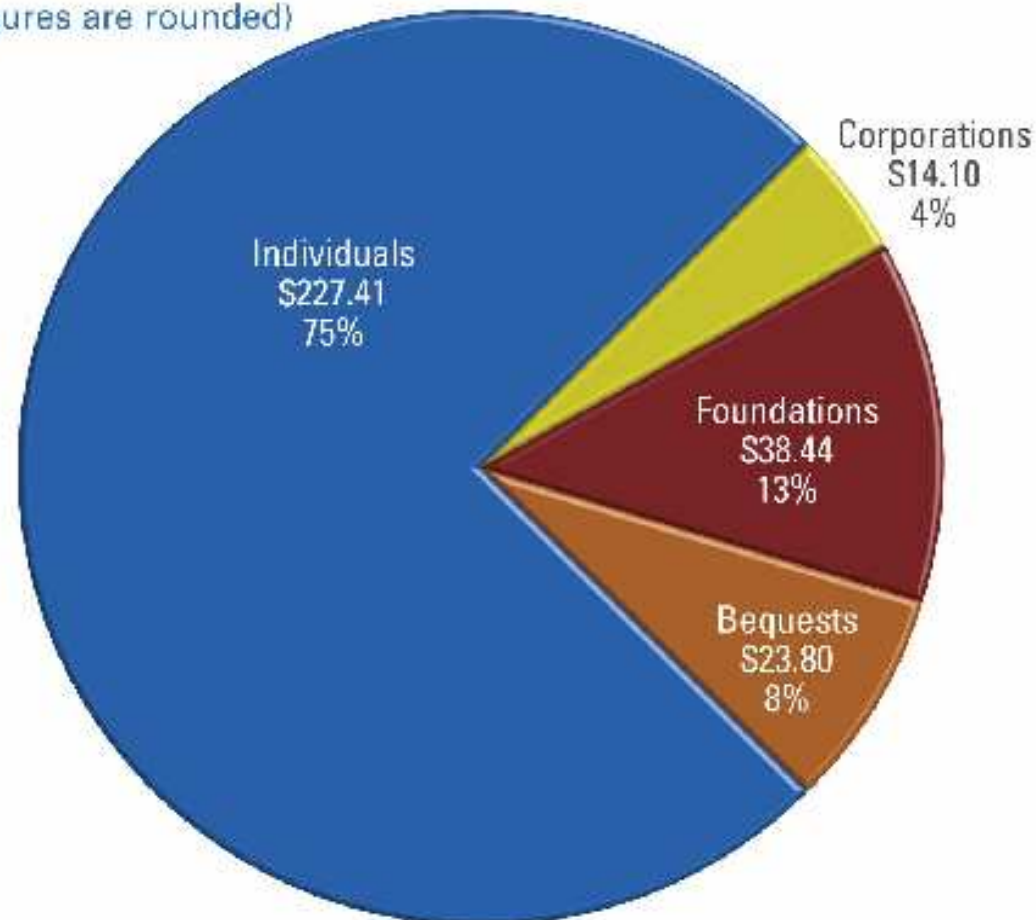
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- Fundraising Events (tickets & fees)
- Annual Giving (cash)
- Projects and Programs (non-endowed)
- Scholarships (endowed)
- Programs (endowed)
- In-kind Contributions

# Where the Money Comes From

2009 charitable giving  
Total = \$303.75 billion

(\$ in billions – All figures are rounded)



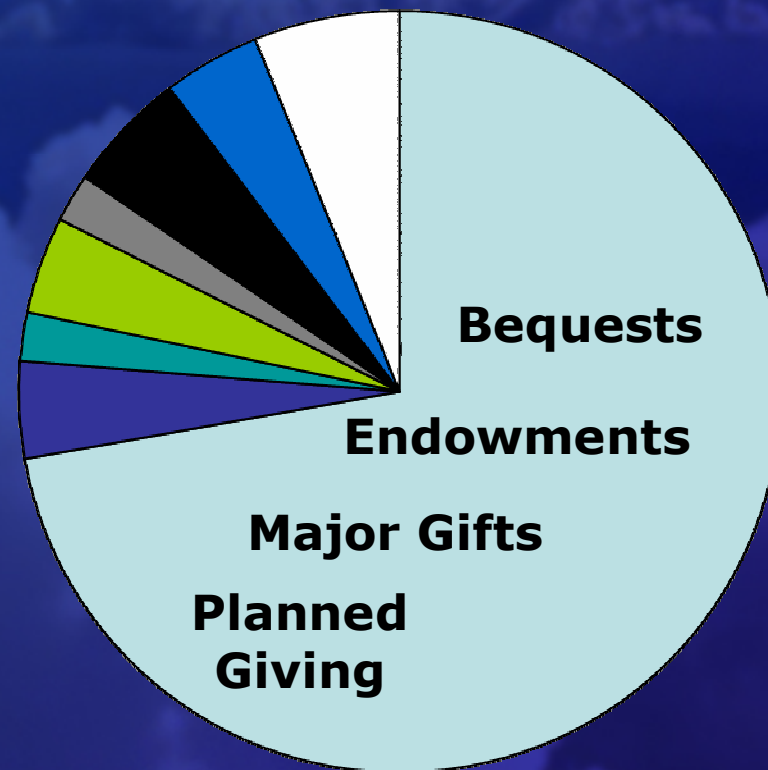
Source: Giving USA Foundation/ *Giving USA 2010*

# Where is the Money?

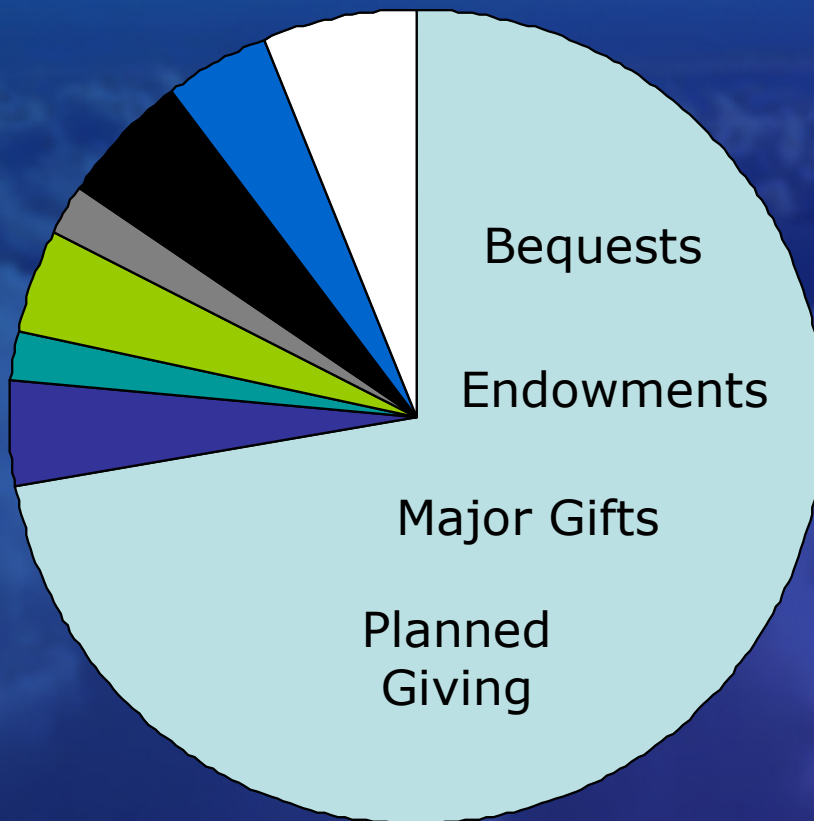
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- Annual Dinner
- Golf Outing
- Brick Campaign
- Silent Auction
- Raffles
- Bake Sales
- Special Events

or Here?



# Finding the REAL Money



Finding the REAL money requires:

- Vision
- Expertise
- Time
- Resources
- Continuity

# To Do the Job Right

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- Focus on building a development program that will bring significant long-term benefits to your District
- Understand the big picture of alumni development – “College Model”
- Understand the basic building blocks for all alumni development programs which are...

# Basic Building Blocks

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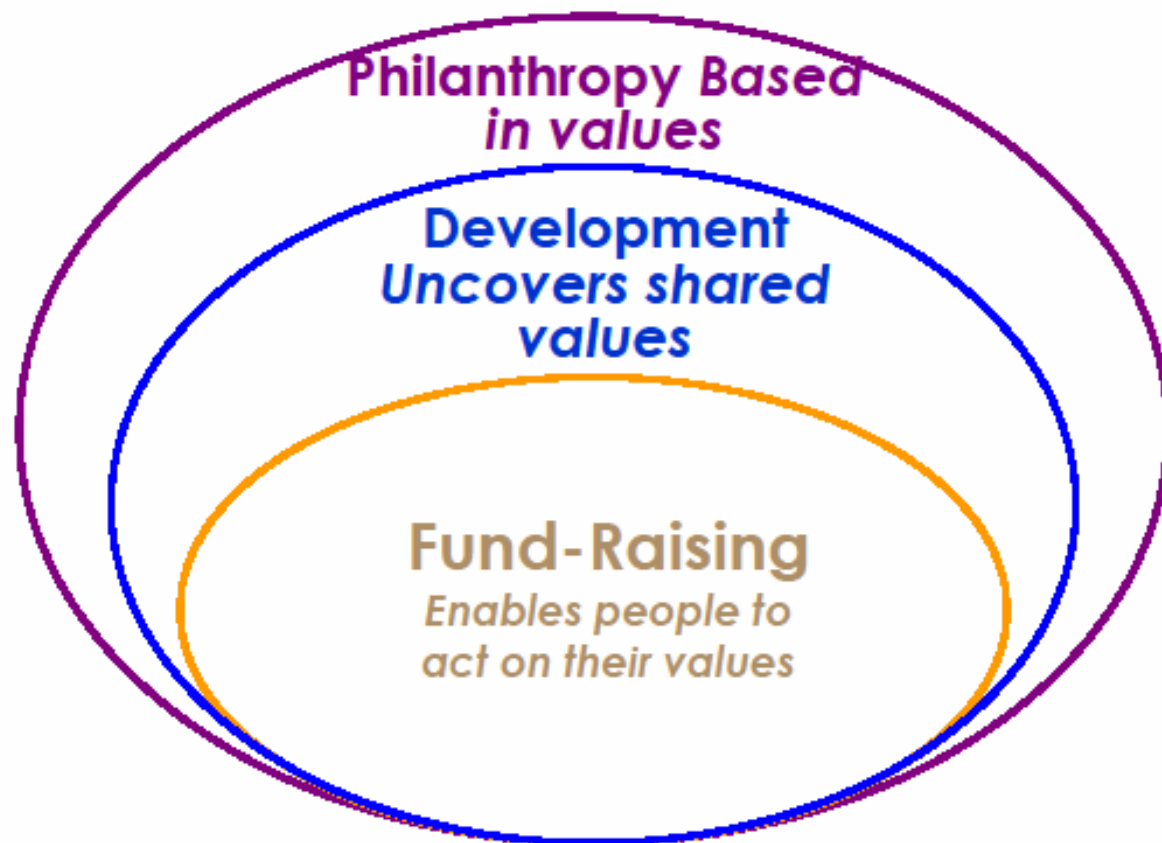
**Database**  
**Annual Giving**

# But First ... Key Considerations

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- Mission
- Scholarships vs. programs
- School board and administration could do it, but ...
- LEF to the rescue!
- Fund raising vs. development

# Development is the process of uncovering shared values



# Fund Raising

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- Part of Development
- Goal-oriented and time-driven; i.e., special projects or campaign
- Generate cash now
- Great relief when completed; often little further contact with donors
- Hard work and no fun!

# Development - College Model

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- Records/database driven
- Tell the story
- Build the relationship
- Move donors to ever-higher levels of support...annual...project...campaign...  
***endowment...bequests***
- The I-o-o-o-o-n-g view
- Rewarding and fun!

# Basic Development Program

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- Database – it all starts here!
  - Capture everything
  - A never-ending process
- Annual Giving
  - Provides cash flow
  - Usually doesn't yield big \$\$
  - Identifies interest – vital info
  - Feeds Database

# From the Database

## Grad Year Status Count for Eagle Ambassadors

Reflects gifts received as of 1/14/2011

	Active	Deceased	Lost	Total	Email	Donors	Dollars
1954	30	9	37	76	7		
1955	11	3	68	82	4		
1956	16	4	72	92	5		
1957	71	22	18	111	18	4	\$275.00
1958	102	19	7	128	19	3	\$150.00
1959	116	28	10	154	16	7	\$1,185.00
1960	164	25	8	197	18	3	\$115.00
1961	46	6	101	153	13	3	\$250.00
1962	43	7	94	144	10	2	\$500.00
1963	34	3	67	104	13	2	\$50.00
1964	167	16	29	212	38	3	\$675.00
1965	146	9	21	176	22	4	\$275.00
1966	19	5	247	271	4		
1967	200	14	22	236	58	1	\$105.00
1968	123	5	53	181	32	1	\$75.00
1969	95	17	114	226	26		
1970	59	7	115	181	17		
1971	214	9	37	260	61	4	\$800.00

# Annual Giving Data

## Top 25 Annual Fund Donors

Will & Doc Curtin 1975/1965	\$2,400.00
HRI, Inc.	\$1,827.00
Anonymous	\$1,250.00
Daniel Fisher 1964	\$1,000.00
Karen Urbanik 1977	\$750.00
Dr. Christopher Hartley	\$550.00
**Joanne Gordon, wife of Samuel Gordon	\$500.00
Joel Confer 1959	\$500.00
Kimberly Ortensio-Nielson 1975	\$500.00
R. Leonard 1962	\$350.00
Barry Biggans 1967	\$250.00
Cynthia Draine 1971	\$250.00
Dr. Beryl Packer 1969	\$250.00
Dr. Howard Panik 1962	\$250.00
Susan McFadden 1971	\$250.00
Arlene Smith 1957	\$200.00
Eugene Wenrick 1971	\$200.00
Rose Hoover 1971	\$200.00
SMSgt Les Hart USAFR(R) 1958	\$200.00
Larry Watson 1964	\$150.00
Ronald Bracken 1961	\$150.00
Frederick Ziegler 1961	\$125.00
James Rudy 1957	\$125.00
Patricia Dixson 1957	\$125.00
Stephen Rudy 1968	\$125.00
** Deceased	

## Top 10 Classes - By Dollars

Specials	\$3,627.00
1975/1965	\$2,400.00
1959	\$1,425.00
1964	\$1,225.00
1977	\$975.00
1971	\$900.00
1975	\$625.00
1962	\$600.00
1957	\$525.00
1958	\$400.00

## Top 10 Classes - By Donors

1959	9
1957	5
1960	5
Specials	4
1958	4
1965	4
1971	4
1975	4
1977	4
1961	3

# Intermediate Level Program

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- Ongoing Contact and Stewardship
- Projects and Programs
  - Perfect for Reunion giving
  - Mini-campaign
  - Wish lists



## Eagle Ambassadors, Inc.

Supporting the Bald Eagle Area School District

### Creative Ways to Give

The mission of the Eagle Ambassadors is to provide support for the Bald Eagle Area School District, especially by engaging our alumni and friends in this process. The following examples show opportunities to support BEASD through Eagle Ambassadors by addressing current tangible needs.

For more information or to make a gift in support of one or more of these priority needs, please contact Rose Hoover, Administrative Assistant, at [rmhoover@beasd.org](mailto:rmhoover@beasd.org) or at 814-353-1413. It's that easy for you, your family or your entire class to make a difference!

Item Needed	Price per Item	Quantity Needed	Total \$	Intended Use
Boreal Middle/High School Compound Microscope	\$255	4	\$1,020	To be used in Middle/High School Science experiments
Dell Classroom Computers	\$1,300	25	\$32,500	Needed for replacing student computers in Computer Labs
CDWG Printers	\$400	6	\$2,400	Needed for replacing printers in student Computer Labs
Magazine Subscriptions	\$25	10	\$250	Needed for High School Library (student use)
TI N-spire graphing calculators	\$200	30	\$6,000	Student calculators for math - grades 8-12
Elementary Art Supplies (Drawing paper, brushes, art paste, burlap, etc.)	\$300	4	\$1,200	Needed for elementary art program in each of the four elementary schools
Masonite Boards	\$12	10	\$120	Used to make white boards for student use

# Advanced Development Program

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- Major Giving
  - Usually endowment – create a fund
  - Fund minimum
  - Personal contact
  - Campaigns ... or not
- Legacy/Bequest Societies
  - Where the money is
  - Tomorrow dollars
  - Start now!

# Legacy Societies

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- Easy to Establish
- Everyone who has an estate is a prospect ... which means just about everyone
- Legacy gifts don't conflict with annual giving, campaigns, etc.
- Leaders must understand the importance of bequests; 100% participation

## Still not convinced?

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By the year 2055, some \$41 trillion will change hands as Americans pass on their accumulated assets to the next generation.

**This is where the money is!**

# Legacy Society Success Story

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- Started small
- Now over 300 “members”
- Estimated \$100M in the pipeline
- Widespread recognition and acceptance
- Celebrates the decision, not the amount

**This is where the money is!**

# School District Success Story

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- SCASD partnership with CF
- Donor and district determine the use
- CF manages the investments and administers the distributions
- Everybody wins!

# SCASD Family of Funds

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**Joan Virginia Almquist Fund (2007)**  
**Margaret (Marge) Brouse Antes Thespian Fund (2002)**  
**William E. and Dorothy Floyd Babcock Family Fund (2000)**  
**Shiri Berg First Flute Memorial Awards Fund (2007)**  
**Eugene R. Brooks Memorial Fund (1999)**  
**Builders Association of Central PA Memorial Fund (1999)**  
**Donald W. Carruthers Jr. Memorial Scholarship Fund (1999)**  
**Centre Lifelink EMS Sara Dunlap Scholarship Fund (2001)**  
**Skip Coleman Memorial Basketball Scholarship Fund (2000)**  
**Crescendo Fund (2002)**  
**Naomi A. and Floyd B. Fischer LifeLink Fund (2000)**  
**Martha W. Fleming Memorial Fund (1998)**  
**Karen Bruno Ganter Memorial Fund (2002)**  
**Thomas G. Haugh Memorial Scholarship Fund (2007)**

*more...*

# SCASD Family of Funds

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**Annalee Henderson Mathematics Faculty Fund (1998)**

**Melissa K. and Robert A. Heydenreich Fund (2004)**

**Ann L. Infield Memorial Fund for Track and Field (2002)**

**Laura S. Jones Memorial Fund (1998)**

**John Glenn Kovalchik Memorial Scholarship Fund (1999)**

**C. Morris Lutz Memorial Scholarship Fund (2003)**

**Robert Michael Marciniak Memorial Scholarship Fund (1999)**

**Hogan and Grace Markle Fund (2006)**

**Dianne Maser Memorial Scholarship Fund (1999)**

**Ralph L. Montresor Baseball Award Fund (1999)**

**Queeney Family Fund (1997)**

**Richard A. Queeney Fund for Educational Opportunity (2003)**

**Radio Park Elementary School Educational Initiatives Fund (2000)**

**Sherm Reichard Memorial Fund (1998)**

*and more...*

# SCASD Family of Funds

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**Leslie Savino Memorial Fund (2005)**  
**Marc D. Shapiro Charitable and Educational Fund (1997)**  
**Raymond Shibley Memorial Fund (1998)**  
**Helen J. Small Memorial Fund (1998)**  
**State College Area High School Alumni Association Fund (2000)**  
**Gerald B. M. and Sylvia Stein Fund (2001)**  
**Superintendent's Fund for Instructional Innovation (2002)**  
**Jerome Tanner Memorial Scholarship Fund (2001)**  
**Stefan H. Umberger Memorial Award Fund (2000)**  
**Patrick Y. Wang Technology Innovation Fund (2005)**  
**Donald J. Willower Memorial Fund (2002)**

*still more...*

# SCASD Family of Funds

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**SCASD Awards Endowment Fund (1998)**  
**SCASD Community Education Fund (2006)**  
**SCASD Educational Initiatives Fund (1998)**  
**SCASD Extracurricular Fund (1998)**  
**SCASD Library Endowment Fund (1998)**  
**SCASD LifeLink Fund (1996)**  
**SCASD Scholarship Fund (1996)**  
**SCASD Student Activities Support Fund (2007)**

*... and still growing!*

# A Success Story

## SCASD Endowed Funds & Gifts (2010)

Type	#	Value	Distribution
Scholarship	82	\$2,377,650	\$81,278
Program	51	\$1,050,000	\$138,710
Total	133	\$3,427,650	\$219,988

# Moving Ahead

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- Volunteers can / volunteers can't
  - Vision ?
  - Expertise ?
  - Time ?
  - Resources ?
  - Continuity ?
- SD and LEF must make the commitment!

# Benefits to Your District

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- Dynamic database
- Steadily increasing alumni interest
- Potential for annual gifts ... major gifts ... ***endowments ... bequests***
- Platform for the future

***A true Culture of Support!***

# Keys to Development Success

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- The College Model
- Database
- Annual Giving
- Tell the Story
- Build the Relationship
- Continuity
- ASK!

# Questions

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- Does your district need new funding streams?
- Are you satisfied with the status quo?
- How can you get to the next level?
- Can you make long-term commitment – resources, energy?

# A Vision for the Future

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- Consider the possibilities
- Think BIG and LONG-TERM
- Think like a college
- Build a Culture of Support

**This is YOUR legacy!**



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Helping public school districts build a *Culture of Support*