Slip Slidin’ Away

BY COMPANY PRESIDENT BILL JAQUES

Slip slidin’ away
Slip slidin’ away
You know the nearer your destination
The more you’re slip slidin’ away.

The legendary songwriter and singer, Paul Simon, wrote the above lyrics as the chorus for his 1977 classic song, “Slip Slidin’ Away.” He just didn’t know that he was describing the state of alumni participation in today’s world of educational fund-raising.

Across the landscape of nearly 5,000 colleges and universities, independent and other non-public elementary and secondary schools, the flight of alumni donors is well known. Institutions that had enjoyed decades of broad-based support — exceeding 40% and sometimes 50% — have seen alumni participation totals plummet 10% to 30%.

At Jaques & Company, we’ve worked with dozens of these organizations, trying to understand the reasons for this trend and, of course, trying to help our clients reverse it.

Recently, we decided to talk with some of our clients, and with other institutions that we admire, about best practices in addressing the participation challenge.

We chose institutions/programs with strong track records of success in building, maintaining, or rebuilding fund participation. Not surprisingly, these institutions have simultaneously achieved excellent track records of dollar growth. We hope there is something of value here for all of our readers.

Theme 1: Relationship Building at the Core — In our interviews, many reasons were cited for the breakdown in participation. Some have to do with institutional behavior (development program resource constraints, focus on dollar growth vs. participation, etc.) while others appear to be market phenomena (philanthropic competition, market message overload, etc.). Responses are different, but our sample institutions share a common strategic thought: relationship building must be at the heart of all they do.

Alumni recognize very quickly whether or not the institution is interested in them and is making a genuine effort to know and engage them. Participation takes a hit when institutional behavior focuses (only?) on the yearly gift transaction.

Theme 2: Reinventing Alumni Programs — There’s a shift toward targeting audiences with special interests or connections and offering events or experiences that appeal to them. This “affinity” programming is replacing traditional alumni events (where one might get a presidential update, hear a student a cappella group, etc.) and in some institutions, is proving to be a much more relevant engagement strategy than class/reunion-based activities.

C.J. Menard, Associate Vice President for Development at Boston University, reports that this kind of approach attracts many alumni who otherwise would...
not participate. The nature of events/activities is more substantive and appeals especially to those who are looking for more meaningful contacts or connections. “Our alumni are looking for more from their university right now,” says Menard. “Tugging at the heartstrings just doesn’t cut it. We have to find something that’s mutually beneficial.” Job/career networking is one area that seems to be especially popular. Like many institutions, B.U. is making a special effort to offer job counseling services to students before and after graduating.

Alumni participation is directly proportional to the extent that we are proactive in our efforts to reach and engage them.

We have a pervasive impression that our sample (and many other) institutions are adopting more of a (Tom Peters) “ready-fire-aim” attitude – they’re trying out lots of new ideas. They’re also surveying alumni and attempting to be adaptive to emerging interests. Engagement is the objective, as it appears to influence consideration of gift support.

Theme 3: Relentless Outreach – Our sample institutions all concur on one point: alumni participation is directly proportional to the extent that we are proactive in our efforts to reach and engage them.

Like Bucknell, Belmont Hill School is making a special effort directed to its young/recent alumni. Director of Development Beverly Coughlin is placing special emphasis on connecting with college-age alumni and recent graduates. One member of Coughlin’s staff visits college campuses, meeting with BHS graduates over meals, bringing them news from campus, etc. Similarly, at Noble and Greenough, one staff member is assigned to the classes of 1989–2008. Working closely with the Director of Graduate Affairs, this officer plans events and pursues broad annual fund participation with these younger graduates; one element of her responsibility is to acquire as many current email addresses and cell phone numbers as she can.

In other institutions that do not enjoy the strength of tradition in their volunteer efforts, we’re witnessing some not-so-new and new approaches to sustaining/building participation. Most colleges and universities are still committed to their student calling programs, which now operate year round. Below the higher ed level, schools are outsourcing participation calls to firms, using student callers, hiring part-time callers (area college students, faculty spouses, retirees), and using administrative staff to improve contact rates. The use of email and websites are important parts of these strategies. Challenge gifts emphasizing participation (and sometimes, upgrades) are prevalent.

Finally, virtually every institution we spoke with emphasized in one way or another their attempts to segment and target donors/prospects in increasingly sophisticated ways. Bucknell employs a specialized analytical tool called “RFM” (Recency, Frequency, Money). RFM establishes, via a points system, the value of prospects among institutional staff and volunteers as we deal with flighty donor interests and loyalty has to be earned each year. We think that’s a worthy attitude to promote.

Theme 4: Rethinking Communications – We fielded many perspectives on the subject of institutional communications. The annual fund case for support is one focal point. The institutional case can emphasize permanence, stability, tradition of excellence, etc., but it must also emphasize relevance: the ongoing value of the diploma and assurance that today’s programs/ experiences will make a difference to alumni and the world going forward. We heard that the fund-raising case needs to emphasize outcomes made possible by gift dollars. B.U.’s Menard comments, “It is becoming increasingly important how we deliver the message to our alumni about what exactly tuition dollars do, or don’t do, for current students.” The case for participation appears to be most favorably positioned when it emphasizes giving as an opportunity to express one’s personal advocacy for the institution (remember the old saw, “Every gift is an intentional act.”).

Solicitation vehicles? “In” are direct mail, the phone (phonathons are still being used, selectively), email, and (increasingly) online technology.

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Moving away from the solicitation process, the most interesting developments are on the web. At Trinity College (CT), Kathleen O’Connor Boelhouwer, Director of Alumni Relations, is excited about Trinity’s new interactive website, tellyourtrinitystory.com, which provides opportunities for alumni/others to share thoughts on professors, books, experiences, etc. that make Trinity special and link them to others’ stories/experiences. Park School’s (MA) alumni director Laura Moberg is using the social networking site Facebook as her primary means for organizing alumni events and advancing reunion plans.

Theme 5: Dazzling Stewardship – Donor relations, once limited to paying attention to the best of our capital donors, has undergone a radical transformation. Institutions have greatly expanded their programs, with more personalized communications, visits, phone calls, and multi-level contact from trustees, administrators, faculty, students, etc. Interesting comment: a respected consulting colleague recently observed, “The gifts we covet most (unrestricted) are the gifts we Stewart the least.” One response we’re beginning to see is intensive effort being directed to the recognition of annual donors – not only leadership donors, but especially to donors who make gifts year after year (so-called “loyalty donors”) and donors who have established (re-established) the habit of multi-year support.

After all those conferences with their reminders about the “principle of repeat gifts,” the message is finally coming through: no donor can be taken for granted! Donor loyalty has to be earned each year. We think that’s a worthy attitude to promote among institutional staff and volunteers as we deal with flighty donor interests and ever-greater marketplace competition.

We all face an uphill battle in our attempts to advance the participation agenda. For the foreseeable future, pursuit of dollar growth will trump all other priorities. But lest we forget: it is the institution – donor relationship we prize the most over the long term. In that spirit, attention to participation is a worthy antidote to mindless transactional fund-raising practices that deprive us of the genuine meaning of giving, and receiving.

We would like to thank the following people who provided information for this article:

Beverly Coughlin, Director of Development, Bucknell University, Lewisburg, PA

Wayne Loosigian, Annual Fund Director, Phillips Exeter Academy, Exeter, NH

CJ Menard, Associate Vice President for Development, Boston University, Boston, MA

Laura Moberg, Director of Alumni Relations, Park School, Brookline, MA

Robert Robinson, Director of Alumni Affairs, Baylor School, Chattanooga, TN
In the Fall of 2007, Jaques & Company celebrated 20 years of service to the non-profit community (1987-2007). We are proud to continue to help our clients achieve new levels of excellence in strategic planning, fund-raising, governance, and financial management.

Since we’ve been around, and we’ve got a great team, we decided (like our beloved Boston Red Sox) to celebrate at Fenway Park on Nov. 15, 2007. It was our honor to host our “team” – current and past clients, trustees, industry colleagues, current and former employees of the company, and other friends. The assembled group played a large part in the history and success of Jaques & Company over the past 20 years!

Expressing his gratitude, Founder and Company President Bill Jaques remarked that “Tonight is an important milestone for Jaques & Co. We are proud of our 20 years of service to the non-profit community. But tonight is really a celebration of what we all do – all of us in this room, and many others who cannot be here tonight. We are the inheritors of the important, ongoing work of the so-called Third Sector and its arterial lifeblood, philanthropy. This uniquely American undertaking – more than 1.5 million non-profit institutions, involving more than 100 million volunteers, and in 2006 attracting nearly 225 billion dollars in gift support – is as old as our nation. From the beginning, the Founding Fathers knew that government and business could not support the full work of democracy. As individuals and via collective effort (think institutions), the citizenry would have to step up.

Thomas Jefferson understood this, capturing the ideal, perhaps, in his concept of the ‘pursuit of happiness’. Two hundred years later, the late author George Plimpton turned that around, telling the Class of 1978 at Milton Academy that the journey ahead was really about the ‘happiness of pursuit’. Pursuit of ideals, surely, but just as surely, the stimulating, unpredictable, roller coaster pursuit of ideas, possibilities, discoveries, human understanding, and the advancement of mankind. And, of course, the pursuit of personal meaning.

Philanthropy is about what we can do today to advance humanity and make a better, safer, more equitable, and peaceful world. But it is as much a big bet on the future. I think it is this aspirational ingredient that is so compelling for us. It connects our innate sense of personal mission with the grand hopes and dreams that represent our collective vision. We are called to act on behalf of others, including many whom we will never know. How powerful, and how wonderful!

In this sense, the business of philanthropy is rarely accidental and never incidental. It is intentional. Largely played out in the life and work of so many wonderful institutions, our engagement in philanthropy gives our lives meaning and connection. What a gift to us!”

20 YEARS PLAYIN’ BALL! JAQUES & CO. HITS MILESTONE
Staff Announcements

Farewell to Nancy Skinner

Company Principal since 1999, Nancy left the firm in 2007 to become the Chief Development Officer for Citi Performing Arts Center Boston, (MA), which includes both the Wang Theatre and Shubert Theatre. She will be responsible for all organizational fund-raising including planning, management, and program implementation, especially as it relates to support of Citi’s new strategic plan.

Nancy’s clients will greatly miss her brilliant insight, wisdom, and unflagging loyalty. We will sorely miss her commitment to making Jaques & Company the best it can be, her profound humanity, her steadfast friendship, and irrepressible sense of fun. Godspeed!

Lisa J. Boudreau
Company Consultant

Lisa Boudreau joined Jaques & Company in 2007 with fifteen years of professional development experience. She has in-depth campaign, annual fund, and major gift experience in a variety of sophisticated settings.

Lisa began her career at Connecticut College (New London, CT) as Assistant and then Associate Director of the Annual Fund. She then initiated a ten-year commitment to Harvard University’s Faculty of Arts and Sciences (Cambridge, MA), as Associate Director of the Harvard College Fund, Major Gift Officer, Director of Development and Corporate Relations for the Division of Engineering and Applied Sciences, and as Managing Director of the Harvard College Fund. During a one-year hiatus from Harvard, Lisa lived in London and served as Head of Individual Giving at the London School of Economics (London, UK).

Lisa has a BA from Bucknell University (Lewisburg, PA) in sociology. She has served in a number of volunteer roles at Bucknell, including as a member of the Bucknell Alumni Association, as co-chair of Bucknell’s young alumni leadership gifts committee, as alumni admissions representative, and as a class gift co-chair and committee member.

She is a 1996 recipient of the Council for the Advancement and Support of Education (CASE) Rising Star award and has led fund-raising training sessions at CASE and Women in Development.

Andrea C. Stewart
Company Consultant

Andrea joined Jaques & Company in 2006, following 10 years in educational fund-raising in independent schools, higher education, and healthcare.

She began her development career at The Fessenden School (Newton, MA) in the Office of Institutional Advancement, working on the annual fund, a building campaign, and as liaison to the Board and the Parents Association. She then spent six years at Harvard Law School (Cambridge, MA), serving first as Assistant, then Associate Director of the Annual Fund, before becoming Director in 2001. She also served as Associate Director of Leadership (Major) Gifts during her tenure at HLS. Subsequently, Andrea worked for the Northeast Health Foundation (Beverly, MA) as a Senior Major Gifts Officer.

In addition to earning a Master’s degree in Education from Harvard’s Graduate School of Education in Administration, Planning and Social Policy, Andrea also holds a B.A. in English from the University of Vermont, was the 1999 recipient of UVM’s Outstanding Young Alumni award, and served as an Admissions representative, Annual Fund volunteer, Reunion Co-Chair, Boston Events Committee Chair, and member of UVM’s Boston Regional Board. For ten years, Andrea volunteered for Women in Development of Greater Boston (WID) as a board member and co-chair of its programming committee.

To learn more about Lisa and Andrea, go to our website www.jaquesco.com
Great Expectations

We’re surprised that so many institutions continue to be so timid when it comes to discuss giving in the trustee recruitment process. Board generosity -- and the ability of the institution to leverage it with other donors -- is still a very important sine qua non. In discussions with preferred board candidates, we believe that this topic needs to be taken straight on in the context of the various requirements of trusteeship. You have the right to express your expectation that the candidate, if appointed, will be a committed, significant donor. Do your homework so that you can be specific: “Susan, we would expect you to make (name of institution) one of your top three philanthropic priorities during your trusteeship. Specifically, that would translate into a generous four-figure gift to the annual fund and a commensurately generous six-figure commitment, payable over five years, to the current campaign. Could we count on you to do that?”

And, we hope, there will be some no nonsense discussion about your need to enlist her/him as a solicitor!

Transformazing Gift

The September’17 announcement of a $128.5 million gift to George School (Newtown, PA) was the largest gift ever made to an American independent school – elected special pride at Jaques & Company. We were honored to serve as development counsel to George School from 1981 – 2006. During this time, Mrs. Anderson was an exemplary friend of the school, regularly coming to campus to meet with students and faculty, to learn about program developments, and to discuss the future of Quaker education and George School’s innovative approach to it. Her engagement has been lifelong, and her generosity has been steady and wonderfully thoughtful. We salute Barbara and current and former George School leaders Nancy Starmer (Head of School), Anne Storch (Director of Advancement), David Bourns (Former Head of School), and Jim McKay (former Director of Advancement), and members of the George School Committee for the wonderful partnership that has inspired this stupendous gift.

Client Campaign Update

In June 2007, Moses Brown School (Providence, RI) completed its $25-million The Campaign for Moses Brown. The program has transformed the MB campus, adding or improving a number of teaching and learning facilities (music, science, Lower School, Middle School, student commons, dining space, athletics) and augmenting endowment. The final total ($26.2 million) is more than 10 times the largest amount ever given to the school. We extend our congratulations to Head of School Joanne Hoffman, members of the Campaign Executive Committee, and Directors of Development (successively) Anne White and Lucy Lewis ‘84 and their staff on an outstanding accomplishment.

Noble and Greenough School ( Dedham, MA) is poised to complete its $86-million OneNobles comprehensive campaign later this year. The campaign is already over goal with three of its four capital initiatives fully funded (new boarding residence, new arts center, additional endowment for financial aid); the fourth, a $40-million endowment to improve faculty compensation, is very close. The school is already over goal with three of its four capital initiatives fully funded (new boarding residence, new arts center, additional endowment for financial aid); the fourth, a $40-million endowment to improve faculty compensation, is very close. The school is already over goal with three of its four capital initiatives fully funded (new boarding residence, new arts center, additional endowment for financial aid); the fourth, a $40-million endowment to improve faculty compensation, is very close. The school is already over goal with three of its four capital initiatives fully funded (new boarding residence, new arts center, additional endowment for financial aid); the fourth, a $40-million endowment to improve faculty compensation, is very close. The school is already over goal with three of its four capital initiatives fully funded (new boarding residence, new arts center, additional endowment for financial aid); the fourth, a $40-million endowment to improve faculty compensation, is very close.

Polytechnic School

In a recent conversation, trustee president Munger expressed her appreciation for the “organics” way in which Poly’s plans have come together. “Program always leads the way at Poly,” says Wendy. “Defining our path sometimes takes longer than other institutions, but ultimately we are rewarded with a solution that always respects our educational values and appeals to our community.”

The Book of Ecclesiastes tells us, “To everything there is a season…” And so it seems for Polytechnic School, the distinguished Pasadena, CA day school (coed, PK-12, 860 students) which recently completed a year-long celebration of its Centennial and is preparing for the public launch of a major campaign in fall ‘08. This breakthrough endeavor, in planning for more than four years, will seek a minimum of $75 million and as such will be seven times larger than any previous fund-raising effort undertaken at the school. As 2008 begins, the school has secured more than $40 million in advance gifts, including two magnificent $10 million commitments and 11 others of $1 million or more.

Debbie Reed, who was appointed as Poly’s Head of School in 2002, inherited a school with an extremely strong academic tradition (more than 50% of Poly’s graduates earn National Merit “Commended” or higher standing each year), a proud record in college placement, an experienced and supremely dedicated faculty, and a dynamic, diverse, and multi-talented student body (Poly’s applicant-to-admit ratio is 10-1). With that kind of profile, she was surprised that Poly’s historical fund-raising accomplishments had been modest, averaging $1.2 million in the years prior to her appointment. “This has always been — and still is — a school of great humility,” she says. “Poly has always emphasized the need to support people (students and faculty) and programs before addressing facilities improvements.” Indeed, Poly’s 16-acre campus is modest in feel, a tradition established at the school’s founding via the understated genius of Los Angeles architect Myron Hunt. “Now, as we commence the school’s second century, time has caught up with us. We need a major investment in our facilities to support the ongoing excellence of our educational program, and we’re excited to see it on the horizon.”

The campus improvement plan is an ingenious scheme that calls for a major upgrade of Poly’s North and South campuses, including the installation of an underground parking structure under the North Campus. More than half of Poly’s educational facilities will receive attention. In addition, Poly will seek to increase its current $45-million endowment by more than 20%, in support of faculty compensation and professional development, student financial aid, and program development.

Jaques & Company joined the Poly team in 2004, focusing first on various aspects of campaign planning, completing a pre-campaign market study in 2006, and serving as overall campaign counsel. Poly has benefited from the outstanding leadership of a large number of staff and volunteers in directing all of this work, notably former President of the Board of Trustees and Campaign Co-Chair Al Clark ’72, current President of the Board Wendy Munger, trustee and Campaign Co-Chair Ted Samuels, former President of the Board’s son John, and Campaign Director Beth Kopley.

In a recent conversation, trustee president Munger expressed her appreciation for the “organics” way in which Poly’s plans have come together. “Program always leads the way at Poly,” says Wendy. “Defining our path sometimes takes longer than other institutions, but ultimately we are rewarded with a solution that always respects our educational values and appeals to our community.”
About Jaques & Company

Founded in 1987, Jaques & Company is a consulting practice providing strategic and tactical advice to non-profit organizations that are serious about institutional development. We help clients achieve new levels of excellence in strategic planning, fund-raising, governance, and financial strategy and management. We work in several non-profit sectors, principally education, arts and culture, human services, and the environment.

Our “teamwork” approach means that we will combine our resources – broad experience, specialized expertise, and seasoned judgment – with yours to develop programs that meet your needs and produce outstanding results. Ask our clients for details!

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Sandra A. Warner  
Operations Manager

Beverly J. Jaques  
Director of Marketing & Company Resources

We are grateful for the opportunity to have served the following non-profit institutions during the past year.

- Berkshire School - MA (2007)
- Ellis School - PA (2007)
- Friends Academy - MA (2008*)
- Glen Urquhart School - MA (2004-2007)
- Gould Academy - ME (2007*)
- HAWC - Help For Abused Women and their Children - MA (2007*)
- Hillside School - MA (2006)
- Lexington Montessori School - MA (2006)
- Moses Brown School - RI (2001-2007)
- Noble & Greenough School - MA (2002)
- The Park School - MA (2007*)
- Polytechnic School - CA (2004)
- Salisbury School - CT (1988)
- Seven Hills School - OH (2005)
- Shady Hill School - MA (2008*)
- St. John’s Episcopal Church - MA (2003-2007)
- St. Mark’s School - MA (2008*)
- Tenacre Country Day School - MA (1997-2008)

A star (*) denotes clients who are new since summer 2007.

Team Work Newsletter

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Jaques & Company

Governance Workshop

June 20, 2008

Save the Date!