Guidelines for Interpreting and Scoring Benchmarks

13.3 *The development plan requires the school leader/leadership team, in collaboration with the governing body, to ensure that key strategies are in place to identify, grow and maintain significant funding prospects, including alumni/ae, over time and when appropriate*

I. What does this benchmark indicate for school performance?

Benchmark 13.3 is about people as funding prospects. School leaders and leadership teams should be able to develop "friends" who become funding prospects and soon donors and supporters of the school. This requires strategic analysis of current community members, alumni and community leaders, as well as parents and grandparents. Who are they, where are they, and what are their relationships to the school? Planning includes strategies to develop these friendships, from the obvious to the unusual through personal approaches. These are the people who will support the school for years to come. This is also about recognizing all potential supporters, including the current students.

II. As a review team member, what evidence do I look for?

Here are some fundamental guiding questions which will help frame this item:

- Do the mission and vision statements inform the development of who to reach out to as friends to become supporters?

- Is there an analysis of who else is serving the population served by the school or of those who support endeavors that support this population?

- Is there evidence of who might be a school colleague in the field?

- Is there evidence of communication demonstrating collaboration or cooperation on planning to cultivate donors over time?

- Does the data demonstrate a "growth" in the number of friends and donors?

- Is the data analyzed with a focus on the growth in numbers – and how that correlates to a growth in contributions?

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III. What are the key differences between the levels of the rubric?

At level **3-Fully Meets Benchmark,**

> key strategies are in place to develop the plan to grow and maintain a donor base. These strategies are related to an operations plan and the marketing/ communications plan. These strategies are integral to those plans and key to the funding strategies of the governing board finance committee

At level **4-Exceeds Benchmark,**

> key strategies are more than just *related* to "other plans" - they are critical to the success of other plans. School leaders and those responsible hold themselves accountable for adopting new practices and strategies for the development of new friends and new donor accounts. K-8 schools look at high school strategies and high schools look at college and university practices. Guides to philanthropy and foundations are the tools used and referred to by this team. Board members engage in introductions and invite experts from industry to meet, coach and share ideas with staff and the leadership team. Most importantly, everyone is held accountable as results are measured, accounted for and studied over time with course corrections a common strategy. Everyone in most categories is considered always to be a potential friend and then a potential donor. Measures are in place which allow assessment of potential donors, foundations and the management of prospect possibilities.

At level **2-Partially Meets Benchmark,**

> the plan exists but is not fully vetted or supported by the community, either financially or verbally and often is not connected to or does not articulate the mission; as a result, funding is trapped in the same, old funding options, most of which are NOT appealing to today's parent-funder population. The plan is usually not well designed, nor is it shared with the full community. Transparency is not a hallmark of planning and all potential donors are left out of the plan. The plan is not aligned with the communications/marketing plan and the message is muddled. The lack of integration across all plans is sorely obvious and consequently pushes potential donors away, instead of welcoming the donors.

Benchmark 13.3 Developed by CHESCS Guidelines Taskforce 2014

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At level **1-Does Not Meet Benchmark,**

> Usually the concept of development is not established. School leaders and others view development as a series of distinct and unrelated events, which are not supported by the mission and which simply raise money for things, not for a plan. Small funds are literally raised by using students to sell items, such as candy and wrapping paper. There is no clear explanation of the role of students in development planning. These elements should not be identified as a plan in place.

NOTE: Development hinges on mission. Foundations give to support programs, which articulate mission. Donors give to support the mission, which is clear and demonstrates outcomes for people. Development plans should be so irresistible that many donors want to be recognized members of the effort.

IV. What are some key suggestions for improvement?

For any of these areas, use your assessment data based on the scoring above, delineate what you have to do and what you can do, and carefully plan your steps to move forward. Make all of this part of your strategic plan for change and transformation and try not to do it all at once.

To move from level 1 to level 2,
- Share and build community support for the mission and the outcomes associated with the mission.
- Develop a plan to fund the achievement of the outcomes (strategic plan) and as part of this plan develop a plan with funding outcomes and strategies.
- Define the funding options and begin slowly but very carefully marking and measuring all strategies and successes.

To move from level 2 to level 3,
- Plan to move beyond limited funding strategies and opportunities and expand the options.
- Plan for this to become an iterative process, with a constant review and update of a highly flexible and adaptive plan.

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- Include the development of a communications plan, as it is integral to the development plan.
- Ensure that all messaging is managed internally to be consistent and attractive.
- Make certain that the plan is focused on key elements
- Employ all school leaders to effectively implement the plan.

To move from level 3 to 4,
- Continuously evolve the plan so that it becomes fully integrated with communications and enrollment planning.
- Ensure that all plans are synchronized and share message, marketing materials and strategies for bringing more people into the community.
- Commit across school leadership to convert everyone in the community to value the school and its key role in building the larger community.
- Recognize that potential donors represent all sectors, all faiths and all walks of life.
- Pursue foundations to create innovative partnerships in areas such as higher education, other Catholic schools, and other schools in the community.
- Viewing funding opportunities as funding for the children of the community, not the children of just one school.
- Recognize that "reach" is key and expansion of school's reach with success moves one to level 4.
- Assess all results to allow for critical refinement of plans
- Utilize effective advice from experts in the field.

IV. What are key terms for common understanding? (Refer to Glossary for the key terms listed below.)

Advancement
Mission statement
Marketing/ Communications Plan