

# Implementing Institutional Advancement to Increase Institutional Resources

Schechter Presidents Conference Call  
May 4, 2005

“The Lord spoke to Moses, saying: Tell the Israelite people to bring Me gifts; you shall accept gifts for Me from every person whose heart so moves him....And let them make me a sanctuary that I may dwell among them”

Exodus 25:1-2

# Objectives

- Discuss concept of Institutional Advancement (IA) as a way to dramatically increase access to donor-derived resources
- Discuss IA's applicability to your school's situation
- Practice IA thinking to build our collective familiarity with the approach



# “Future Challenges”-Circa 5/2005

Capital Needs for New School/Renovated School  
Estimated

– @ \$??? Million

- Endowment - Virtually Non-Existent
  - Scholarship needs are not being adequately met to maintain/increase enrollment
    - » New families are hindered with current tuition costs
  - Program Funding limited
- Competition for Funds - more intense than ever
- How do we make it work as a “Community”

# Institutional Advancement Can Help Break the Cycle



# Who Is Pursuing Financial IA?

- Most colleges and universities
- Many secular independent schools
- More sophisticated Jewish day schools, e.g., Epstein School in Atlanta, Rashi School in Boston, South Area Solomon Schechter Day School, Your School?

# Institutional Advancement

A proactive process for

- Enriching the profile and perceived value of an institution vis a vis key target audiences in order to accomplish critical strategic objectives, e.g., enhance fundraising capability
  - **Awareness>>>Interest>>>Preference>>>Choice**
- Building institutional capability to take greater advantage of this enhanced positioning

# Institutional Advancement Vs. Development

## **Institutional Advancement**

- Strategic goals drive
- Proactive: create one's destiny
- Long term in orientation
- Potential for transformative impact
- Focus on the “customer”

## **Development**

- Tactical goals drive
- Reactive: optimize what is
- Short term
- Tends to optimize within current opportunity frame
- Focus on the task

# Benefits

- Opportunity to
  - **Grow the prospective donor base**, e.g., outside of immediate geographic territory and prospects
  - **Enhance board profile** with resource-attracting people
  - Break through historical **resource barriers**
  - Cultivate a **community and nation-wide reputation** befitting the school's accomplishments

# Requirements

- ✓ **A compelling (to donors) strategic vision, strategic plan, and long-term financial plan** to accomplish it
- ✓ **Willingness to listen** to desires of donors and to consider new objectives and programs and objectives that accomplish their goals (and are consistent with school's mission!)
- ✓ **Commitment** to develop a **board profile** that views active fundraising as a sacred trust

# Possible Implications

- Depending on the nature and magnitude of strategic financial needs, the school may need to...
  - View itself in a **larger community-wide or even national context** versus a local constituency context
  - Define and **cultivate a strong image with new target donors** who are not aware of the school and would not provide significant funds to it as an excellent limited constituency day school
  - Significantly **strengthen the major gift fundraising power** of the Board

# Trying this Thinking On for Size

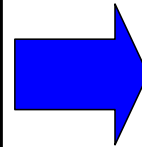
**The  
Process  
Begins  
With  
Where  
Your  
School  
Wants  
To End  
Up!**

**End State 2008?**

**Enroll X00  
students?/Increase  
penetration of  
pre-Schls**

**State of the Art \$X+  
million facility?**

**\$X million  
endowment?**



**The**  
**Goals**  
**You Aspire**  
**To**  
**Have**  
**Donor**  
**Implications!**

**Funding  
Potential:**

**Local Area  
Jews?**                      \$X

**Greater Metro  
Jews?**                      \$X

**National  
Jewish  
Donors?**                      \$X

**Jewish  
Foundations ?**                      \$X

**Secular  
Foundations ?**                      \$X

**Illustrative**

# **...and Case Statement/Positioning Implications**

**Local Donors**

✓

**Greater Metro Donors**

✓

**National Jewish Donors**

✓

**Jewish Foundations**

✓

**Secular Foundations**

✓

**Ours is an excellent, Jewish day school that superbly serves the Local Area?**

**Ours is a national role model for how to integrate with and penetrate the pre-School (public school) market?**

**Our School has created a unique internationally recognized curriculum which enables deep relationships between Jewish and non Jewish children?**

**Our School has created a nationally recognized model environment for integrating Special Needs students with mainstream students?**

# The Path Forward

- Sharpen your school's Vision of the Future
- Create Up to Date Strategic Plan and related long term financial plan as part of Roadmap to that Vision
- Define and Get to Know the Donors With the Resources Required to Make it Happen
- Sharpen the Case Statement appropriately, in light of those donor's interests
- Cultivate and Migrate the Donors
  - **Awareness>>>Interest>>>Preference>>>Choice**



# Bio: Harry Bloom (harry@harrybloom.com)

Harry Bloom is serving as the South Area Solomon Schechter's Director of Institutional Advancement. Additionally, he is the President of Learning Acceleration, LLC, a consultancy devoted to helping day schools develop strategic plans and actively employ Institutional Advancement techniques in order to enhance leadership and governance, fundraising and admission efforts

Mr. Bloom is an experienced manager and management consultant who has worked for some of the leading corporations and consultancies in the world, including Procter & Gamble, General Electric, BOSE Corporation and McKinsey & Company. He helped PEJE develop the highly successful Joint Purchasing Program for day schools and helped found the PEJE Knowledge Exchange which codifies independent and day school best practice in Student Admission and Retention, Leadership and Governance, and Fundraising.

Mr. Bloom has a B.A. and a Hebrew Teacher's License from Yeshiva University and an MBA from Columbia University's School of Business. He is a doctoral student at the Azrieli Graduate School of Education and Administration at Yeshiva University. He is the recipient of the Synagogue Council of Massachusetts' Klal Yisrael Award for his volunteer work for Magen David Adom among school children and their parents.