

# NATIVITY JESUIT

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## A C A D E M Y

1515 S 29<sup>th</sup> Street / Milwaukee, WI 53215

Advancement Committee Virtual Meeting

December 1<sup>st</sup>, 2020 – 7:30-8:30 AM

### **In Virtual Attendance:**

- Emily Schober, Organizer
- Sissy Laudon
- Andres Gonzalez
- Bob Monday
- Dan Nigro
- Kathleen Waterbury
- Maureen Schuerman
- Monika Sobierajski
- Carolyn Spath

### **Unable to Connect Virtually:**

- Dave Siewert

### **I. Committee Work (30 minutes)**

#### **a. Nativity Vulnerabilities and Opportunities**

- November meeting (as originally scheduled) was cancelled, anticipated nothing pressing to discuss. However, as Maureen and Emily dove deeper into creating their portfolios and analyzed our donor database, some clear vulnerabilities, and opportunities that we need to address.
- NJA Advancement Team concluded that all roles are working above current capacity, but we still need to proactively address these vulnerabilities and opportunities. Proposal for role additions was given to the committee members,
- Sissy asked staffing comparisons to other grade schools. Emily said there really are no other K-8 schools like Nativity, and at the end of the day that is why Nativity is so successful with our fundraising and extra resources we can obtain. We did compare to Notre Dame School of Milwaukee- they have a Director of Advancement and a Director of Development. Their school is not academically at the same level of Nativity (about 20 percentile points lower than NJA on state testing). Marquette High has a

dedicated alumni role, two roles focused on communications and marketing, Director of Development, a major gift donor and two event staff members. MUHS' events have stronger volunteer components whereas NJA events are more run by staff. DSHA is similarly stacked with their roles. It is very hard to make K-8 comparisons because not a lot of other K-8 schools have the donor opportunities that we have built over the years.

- Andres asked about funding and sustaining these roles over time. Andres is confident that these roles will pay for themselves over time and is in full support of these two positions. We are confident that these positions will be fully funded by the work of the team because of increased capacity in almost every role. Maureen's portfolio is full. Emily is unable to give full attention to both her major gift portfolio and the foundations we are cultivating and soliciting. By adding to our team, Emily's capacity would greatly increase by solely being able to focus on major gift donors. These roles will also greatly increase Carolyn's capacity by having the time to build a strong mid-tier giving program which will increase donors up to Emily's portfolio, and similarly on to Maureen's portfolio. Maureen's portfolio has some older major gift donors who we know we are going to lose in the next decade. Maureen discussed in the short-term, we do expect the positions to pay for themselves (about \$100,000 for fully loaded salaries and benefits) due to the many opportunities as well as the best practices being put into place for our team. In the long-term, the more we have people doing best practices, the more funds we will be able to obtain (7.5-10% increase expected). Maureen spoke regarding some industry fundraising best practices. Based on Maureen's experiences, she has never seen this level of giving without all best practices in place. We can expect increases in giving and we have an amazing amount of potential.
- Dan asked about salary ranges for the positions. Maureen stated we would follow up about that after the call since we had staff members on the call, but that these would be more junior positions (young with potential and highly trainable). Communications role could be right out of college. Foundations person could be right out of college or with a few years of experience. If we start looking soon, we could have someone lined up by the start of next fiscal year if not a little earlier.
- Dan asked about restricted gifts and how that works. Maureen discussed the difference between restricted and unrestricted. Most of Nativity's money that comes in is unrestricted (Maureen estimated 98% being unrestricted). Emily spoke that restricted gifts are more likely to come in from foundations as compared to individual donors.
- Bob asked for clarification on the 56 lapsed major gift donors. Emily states that not much has been done, and many have been sitting on the previous director's portfolio. Maureen discussed the great potential of

reengaging lapsed donors, such as what was done with The Magis Society. Bob applauds the leadership that was done to look at this. He believes there is great competition with other schools and he appreciates us looking at this as an investment with dividends instead of a cost. Bob would like performance attached to a salary. Bob wants us to look for someone who has the qualities to become good and not just solely based on their resume.

- Dan asked for our final goal or standard with fundraising. There are some standards out there, but the closer comparisons are for high schools with strong alumni donor bases. There is no good K-8 standard. Maureen said we would want enough to cover our annual operations (over \$3 million dollars). We would expect 4-5% payout for an endowment. Maureen stated it would be important to cover Choice to protect us (about \$1.8 million). Could we endow The Magis Society? A longer game, but why wouldn't we want to go for that?
- Kathleen asked if we analyzed technology and communication platforms (email fundraising) to include video formatting, storytelling mechanisms and easier ways to donate for all tiers. Maureen said we did take a look at that and that we want a dedicated person to lead that, because right now it is just a portion of Carolyn's tasks right now and is not done in a deep and meaningful way without a dedicated staff member.
- Maureen asked if anyone has concerns with the proposal that need to be addressed. Bob asked what we can do to help. Maureen discussed the importance of an endorsement.
- Bob made a motion for the committee to endorse the proposal with both role additions. Seconded by Dan and Kathleen. In favor: Bob, Dan, Kathleen, Sissy, Andres. None opposed.

**Dates for Future Meetings. All meetings are at 7:30 a.m.**

- January 12, 2021
- March 9, 2021
- May 11, 2021