

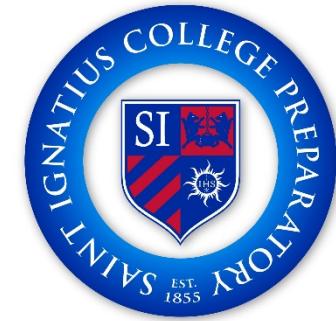
Building Your School's Endowment



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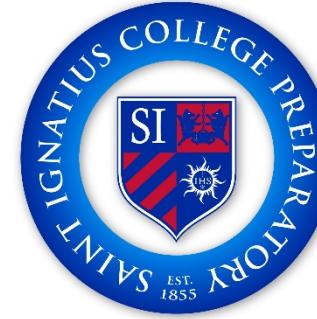
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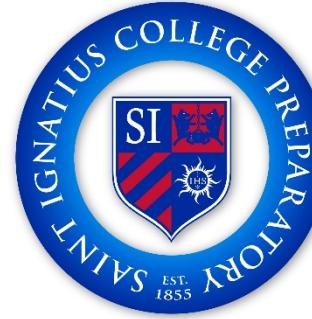
Prep and SI by the numbers



- Enrollment: 765
 - Applicant pool: 578 for 200 spots
- Tuition \$19,700
 - Full cost \$24,850
- Financial Assistance \$2.3 mm
 - Percent of students 24% (178)
 - Revenue from
 - Endowment \$919k
 - Annual Fundraising \$1.25mm
- Enrollment: 1460
 - Applicant pool: 1200 for 380 spots
- Tuition: \$24,000
 - Full cost: \$26,000
- Financial Assistance: \$4.3 mm
 - Percent of students: 23% (335)
 - Revenue from
 - Endowment: \$3.3 mm
 - Annual Fundraising: \$1 mm



Endowment stats



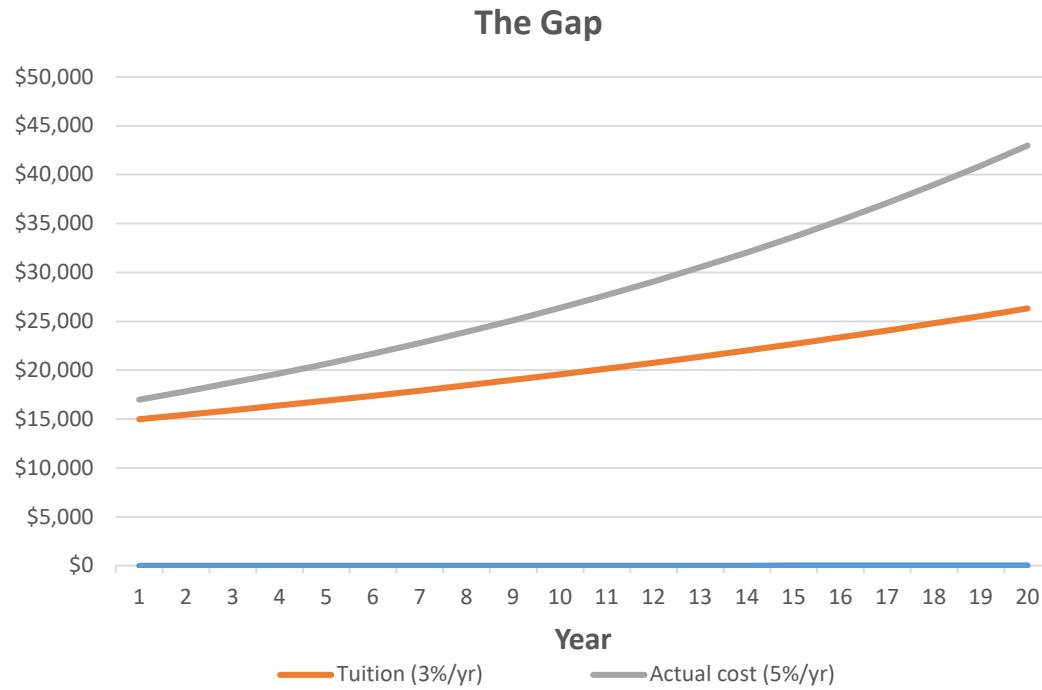
- \$25.9 Endowment
- Min. \$50k to fully fund
- 133 Total funds
 - 70 at full funding (or grandfathered in)
 - 33 building/partial
 - 28 Class endowments (incl. above)
- \$105 mm Total Endowment
 - \$75 mm Scholarship Endowment Fund
 - \$15 mm other, tuition-relieving endowments
 - \$15 mm undesignated
- Min. \$100k to perpetually fund
 - 350 perpetual
 - 179 partial

The Case for Endowment

Quick Case Study

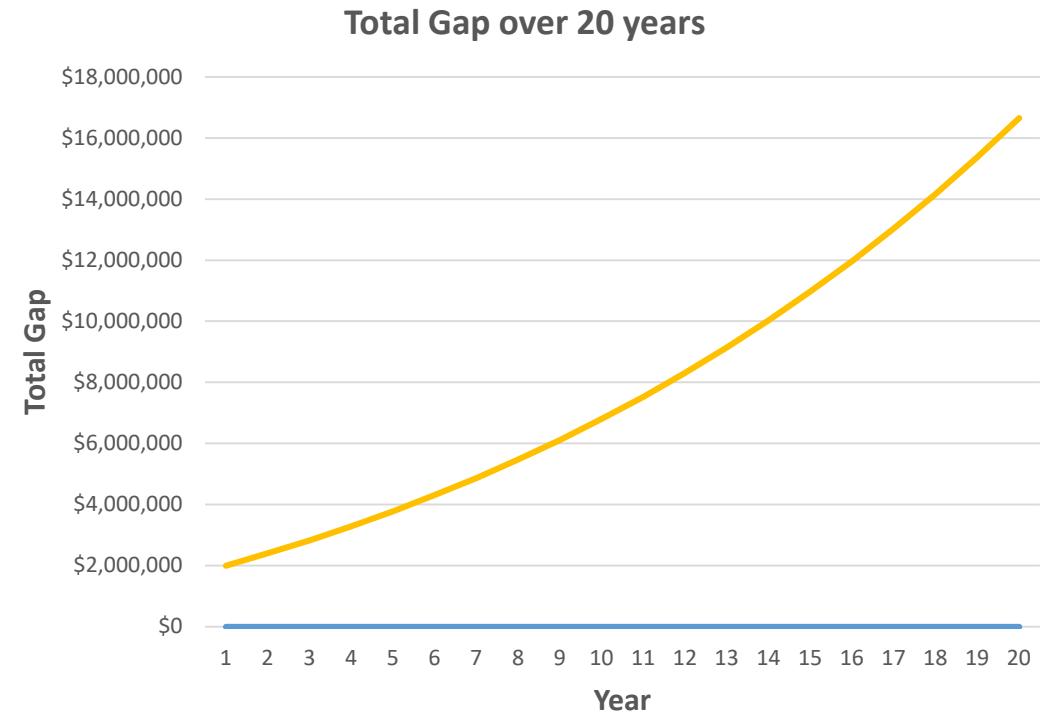
Tuition and the Gap

- \$15,000 tuition
- \$17,000 full cost
- 1000 students
- 3% inflation
- 5% HEPI (*Higher Education Price Index)



Total Gap over 20 Years

$$(\text{Total cost} - \text{tuition}) \times 1000 = \text{Total Gap}$$



The Three Dials

Revenue

- Tuition: Hard, predictable revenue
- Endowment draw

Student Body and FA

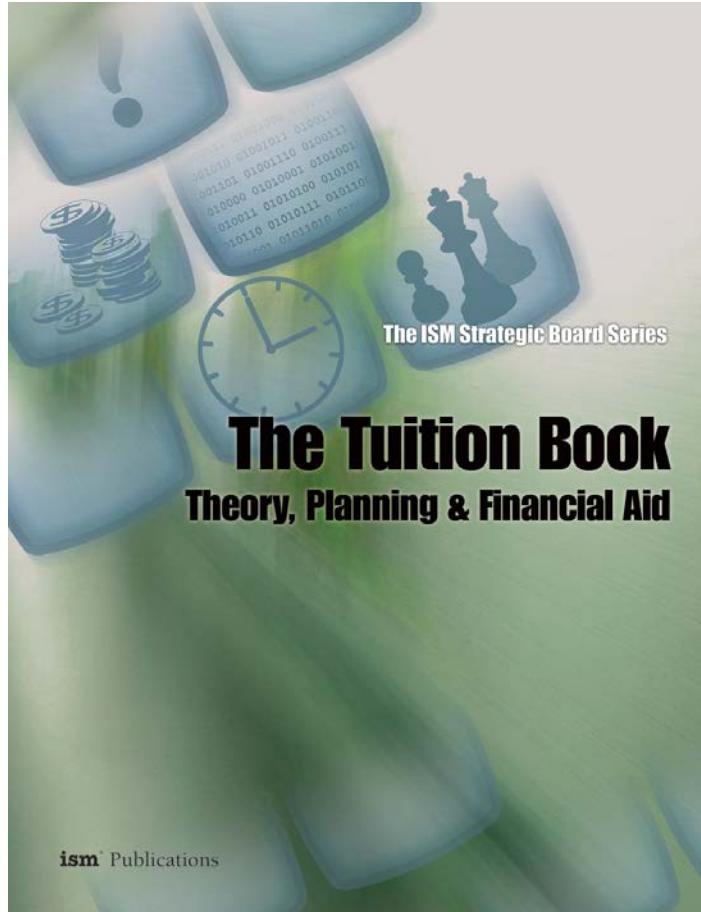
- Actual Enrollment/Budgeted enrollment
- Financial Assistance budget

Donations

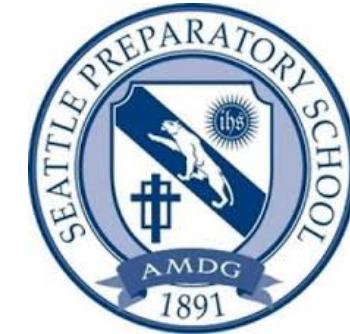
- Soft, unpredictable revenue
- Strategic purposes?



Tuition. . .FA. . .Endowment bible



Seattle Prep Case Study: Soliciting (senior) class endowments



Inherited Strategy

- Fall - Golden Panthers



- Spring - Senior Class



Ongoing Marketing

- Magazine articles (& web)
- Magazine advertising
- AF inserts

A Class(ic) Legacy

Greg Rockwell '62 and John Bianchi '62 share an appreciation for classic cars and Jesuit values. They also share a commitment of leaving a legacy for future Panthers through their class endowment. "You don't have to help a million kids, but you can help one," says John. "If you help them get started, there's so much they can do."



GIFTS TO THE CLASS
OF 2017 ENDOWMENT
TODAY HELP STUDENTS
FOREVER!



ANNUAL
FUND



ENDOWMENT
FUND

Unrestricted gifts
made each year

Gifts are invested



PREP FOR TOMORROW

PREP FOR
TOMORROW



PREP FOR TOMORROW



PREP FOR TOMORROW

what's your legacy?

Evolution of senior class solicitation

2011 – Initial parent/senior solicit

2012-2014 – Capital Campaign

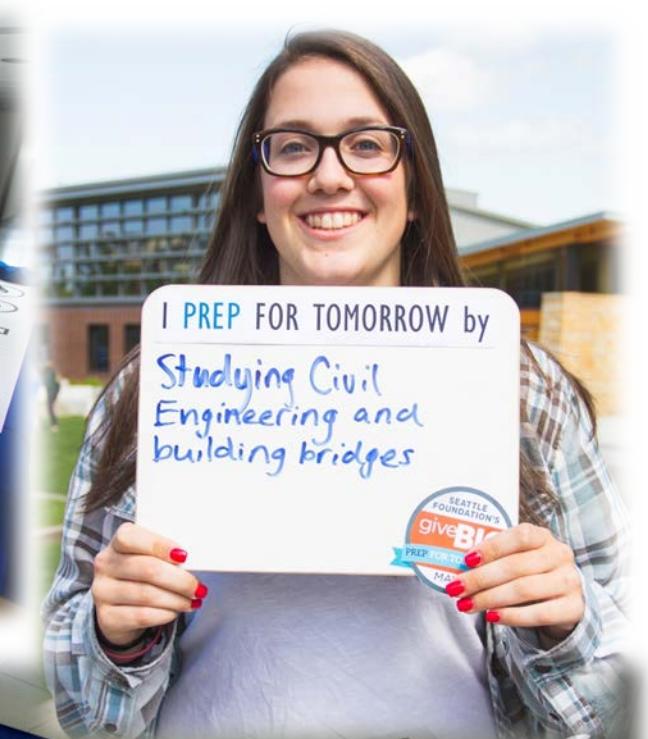
2015-2017 – Local giving day

2018 – Senior Legacy Day

Class of 2015

Developed “Prep for Tomorrow” theme
GIVEBIG - First time for campus event
-Dual events held in gym foyer, eating area
AP Exams!
Student messaging / photos
Webpage
Service hours
Launched Young Alumni Society – diploma
insert letter, Fall care package

Parent solicit – mailing, giving day emails,
News & Notes



Class of 2016

Same theme

AP Exams!

One location w/cap & gown distribution

Senior “ambassadors”

Flat Iggy tribute cards

Campus signage (posterboards)

Chase swipers

Parent solicit – mailing, giving day emails,
News & Notes



On **May 3**, our seniors are launching the Class of 2016 Endowment.

Prep for Tomorrow with your own endowment gift!

Class of 2017

Same theme

AP Exams!

Still w/cap & gown distribution

Campus flyers

Go Fund Me

Photo wall w/VIP graduate

Alumni volunteer

Parent solicit – postcard, News & Notes, giving day emails, post-graduation letter



Class of 2018

Date change!

Twist on theme

Service Day photo shoot

On the “new” terrace w/alumni faculty & ASC

Student swag

Student social media ambassadors (Instagram)

Surprise gift

Parent solicit – leadership gifts, mailing, News & Notes, post-graduation email



Results

2011 Endowment

- \$28,491 Raised – gifts & pledges (165 gifts)
- 83 donors

2012 Endowment

- \$67,989 Raised (110 gifts)
- 92 donors

2013 Endowment

- \$55,913 Raised (240 gifts)
- 101 donors

2014 Endowment - Bimal

- \$48,104 Raised (131 gifts)
- 93 donors

2015 Endowment

- \$23,980 Raised (255 gifts)
- 169 donors
- 50 Students

2016 Endowment

- \$23,907 Raised (202 gifts)
- 144 donors
- 80 Students

2017 Endowment

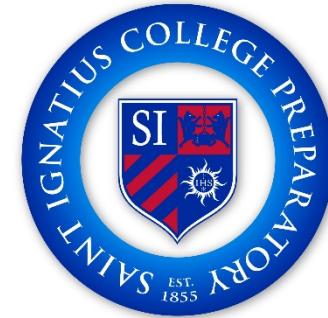
- \$24,199 Raised (248 gifts)
- 173 donors
- 83 Students

2018 Endowment

- \$65,137 Raised (218 gifts)
- 181 donors
- 114 Students



Compass Campaign: \$50 mm Scholarship Endowment Fund



- Endowment Levels
 - \$25k: Partially Endowed Named Scholarship
 - \$100k: Perpetually Endowed Named Scholarship
- Tactics
 - Class scholarships (crowd funding)
 - Asks (\$100k)—family scholarships
 - Planned/Estate Gifts
- Materials/Marketing
 - Black and White Viewbook
 - Video testimonials (website)
 - Scholarship Agreement (handout)
 - *Genesis* (Alumni Magazine) articles
- Stewardship
 - Fundriver Report (handout—stewardship)
 - Annual Report and Scholarship Board
 - Christmas and Easter notes
 - Scholarship mass and brunch (St. X)



Endowment Stewardship

Fall / Winter – TY note & FYE report to all endowment benefactors

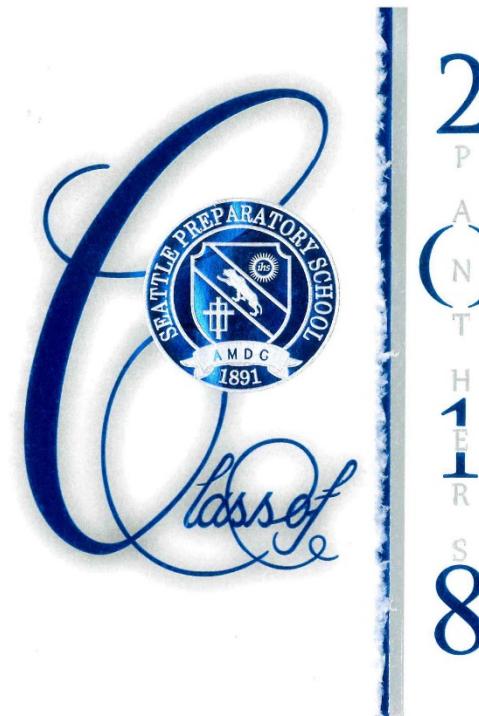
- Electronic version for class endowment leads

Appreciation Dinner / Social

Early in CY – class endowment update email

Spring – FYE report to all benefactors + Prep Panther

Graduation – Final TY note + announcements to senior benefactors



Challenges & Opportunities

- Creating a culture of philanthropy (campus-wide)
- Student communications – What's email?
- Endowments are difficult to understand for students (& adults)
- Timing of parent solicitation – fall of college freshman year?
 - Poaching AF donors
- Student pledge payments
- College communications & Student renewals
- Staffing changes – Communications Director, Alumni Director, Development Asst.
- Endowment reporting
- Patience