



Fundamentals of Fundraising in Montessori Schools

An Overview

What is a donation?

A **donation** is a gift given by an individual, corporation, or other legal entity for charitable purposes and/or to benefit a cause.



Donations are gifts of love

A **donation** must be given voluntarily without any expectation of receiving any goods or services in return.



Paying tuition is not a donation

Tuition is a fee paid in return for services (a great Montessori education).



Donations can take different forms

Cash, stocks and bonds, land, new or used goods, or services.

Charitable gifts of goods or services are also called gifts in kind.



Donations may be tax deductible



—
The myth that tuition cannot
cover all of the cost of
running a school

That's not why
we fundraise



Tip

Charge the cost of doing
the job right

Don't set tuition simply on
the basis of what other
schools charge

Everything is dependent
on perceived value

—

We can cover operating expenses, but almost always we depend on major support for new buildings or big costs



Tip

Charge the cost of doing the job right

Don't set tuition simply on the basis of what other schools charge

Everything is dependent on perceived value

—

Yearly fundraising programs, when done well, can commonly bring in about 10% more than tuition and fees

— **This allows you to**

Work with more resources

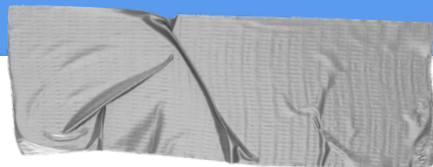
Charge less in tuition

Or offer financial aid

—
We want to cultivate a
culture of giving over time

That's why we
fundraise year
after year





1. Why people give

→ **A Sense of Deep Connection**

People give when they feel that this is their community

→ **A Sense of Ownership**

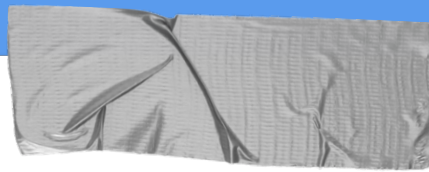
People often give to help make something happen to benefit their child

→ **Influence**

People often give to feel that they have had a say or role in making things happen

→ **Friendships**

People often give because it is what their friends are doing - group influence



2. Why people give

→ **Recognition**

People give to be seen as a valuable patron of something worthwhile, to be admired and respected by others, to gain a degree of immortality.

→ **Social Conscience**

Some people give for reasons of conscience: to further a cause, to support something in which we believe.

→ **To Say Thanks**

Some of the most meaningful gifts are made in honor or in memory of someone they deeply admire

Contrary to our popular image, people who have developed a habit of philanthropy tend to be individuals with strong values and deep beliefs. They believe in people and have a great respect for knowledge. They want to provide opportunities for others that weren't available to them when they were younger. They want to make a contribution back to life.



Tip
These are the people who will ultimately become your most loyal and generous long-term donors. Some of this group will have money. Some will have limited means but big hearts.



They view giving as an investment, and through their investments they desire to solve a problem or issue, seek ways to express themselves. They expect to see and understand a “return on their investment.”

Three types of fundraising

Outright donations

Entertainment value

Bidding or taking a chance on something unique or a real bargain

Typical Ongoing Fundraising

Annual Fund

Special Events

Raffles



Tip

Your school may do all of them or just one, but these are normally annual programs. They become expected

Major Gift Fundraising

Capital Campaign

- New building
- Expansion
- Major repairs
- Improvements

Endowment

A special fund in which the principal funds can never be spent. Only a portion of the interest earned is spent for specific purposes

Planned Giving

- Gifts left to a nonprofit in someone's will
- Charitable lead trusts
- Charitable remainder trusts

People give to people

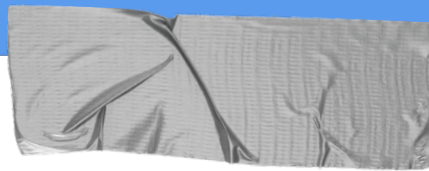
Donors give to causes they feel connected to, but they are most likely to give when asked by someone they like and trust.

Story for illustration purposes only



Tip

IFind the right person who can and wil ask other people to give.



A Culture of Giving

→ **Avoid nickel and dime fundraising**

If people buy a \$5 candy bar, they are done for the year

→ **Don't squander volunteer time**

Be sure that volunteer efforts are well organized, coordinated and leave people feeling that it was worth the effort

→ **Say Thanks**

You can't love your donors and volunteers too much