



## MARKETING COMMITTEE – DEVELOPMENT STRATEGY MEETING WITH AL

### MINUTES 11 February 2022

**In attendance (by Zoom):** Marco Ferrari (Chair), Elspeth Day, John Martelli, Cesare Rotta, Chris Greenhalgh, Amie Louie

**Guest:** Elisabeth Anderson (joined at 9:30)

#### Accompanying Documents:

- PowerPoint Presentation
- Fundraising Brochure

**Start: 09:00**

#### 1. Action Points from Previous Meeting

- Minutes dated 11 February 2021 fully approved. No pending action points from last year's meeting.
- **Update on BSM Magazine** (suggested by ED during previous meeting):

AL explained that a printed magazine would be nice, but the concept is a little outdated as digital publications are much common.

A new library was put in place and includes all school digital publications issued so far, to which the BSM Community can refer to (i.e., *Giving Report*, *50<sup>th</sup> Anniversary publication*, *BSM Brochure* etc...).

Some other key-resources continue to be the main engagement tools (such as the *Alumni Platform*, the *Alumni Newsletter* and the dedicated *BSM Community Social Media pages*) where the community receive regular updates and school news.

- Minutes dated 22 October 2021 \_ Development section:

The action point regarding *Key 3-year objectives* will be discussed at points 2 and 3.

#### 2. Development Strategy – Presentation and Update

The development director started her presentation by giving a Fundraising overview.

She firstly illustrated the “3 main blocks” related to *Internal, Community, and External Fundraising*.

(Please see accompanying document).

**Internal**

**CONFIDENTIAL**

An example of Internal Fundraising is the *Christmas Campaign*, which raised in total €9.892,88.

The internal fundraising activity helps to support scholastic projects, such as the *Greenhouse Project*, where the development office's aim is to provide teachers with the necessary resources to complete the project.

The close relationship with BSM Friends is crucial to move forward with fundraising activities.

A large commitment to fundraising activities is reflected in the website development large data collection, and other accounting topics.

## **Community Outreach**

AL listed the activities performed over the last few years which have led to the creation of a proper alumni database and highlighted the objectives to widen the school community.

A focus was made on the 5xMille Campaign, which is extended to different donors (not only current families and/or staff).

The *5xMille Overview* was shared, with clear amounts raised during specific tax years (from 2014-2019)

AL confirmed that 2018 was the most successful year in terms of 5xMille donations with over €45.000 raised in one go.

JM asked the development director which strategies are now in place to repeat the 2018 result. AL replied that constant communication (through printed materials, newsletters, social medias, Alumni platform, and school website) is fundamental to achieving this goal.

Everyone agreed that even a small increase in families choosing BSM for 5xMille would make a significant difference and therefore this activity deserves great attention.

Family surveys will continue so parents can decide how to invest the 5xMille donations. This practice was considered useful since contributors feel more involved in the process and can understand how the money will be spent. **ACTION**

The survey options will change this year; the new list will include the Bursary Fund, the Science Lab and Creative Arts.

Few parents complete the survey. Nevertheless, the development department believe that this remains the best approach.

**MF suggested to set a clear 5xMille parent message to obtain increased voting numbers. ACTION**  
**AL**

Regarding 5xMille donations, it is difficult for the BSM to compete with other charity associations. For this reason, specific messages are needed to support a worthy cause. **ACTION AL**

The next 5xMille campaign will start towards the end of March 2022, and the Principal suggested that the Board Newsletter should also highlight the message regarding donations. **ACTION ED/AL**

The discussion moved on the Alumni platform – *BSM Sir James Connect*.

With a monthly digest - consisting of Alumni stories, news and events, old school photos, mentoring opportunities and job board, the platform grows constantly (current network size = 3,303 contacts).

## **Philanthropy**

AL explained that the Philanthropy concept is connected to a higher donation amount (+ €10K).

Philanthropy has a long-term vision which requires regular cultivation activity with potential donors.

Philanthropy appeals to both individual donors and corporate sponsors.

It was pointed out that fundraising activity linked to the building project focuses on the Bursary Fund, aiming to offer scholastic opportunities to the local community.

A summary of the tuition fees for one student was presented, with specific study cycle frames.

### **3. Key 3-year objective**

The Development Director presented her 3 Year Plan to the committee, and listed the following strategic objectives:

- 1) to foster giving on a philanthropic level with a focus on the Bursary Fund and Building Project.
- 2) to establish 10 Bursary places by 2025
- 3) to support the building project with major donations

A thorough discussion was held on objective number two since it was considered to be highly ambitious.

EA stated that it is the right time to start with a large-scale fundraising activity, and she also believes that it is not entirely wrong to present an ambitious goal to major donors.

One-to-one discussions should start very soon to see the expected results in three years' time.

Clarification was given about the connection between the Bursary Fund and the Building Project.

JM and CG explained that the idea of fully funded bursary places developed alongside the new school building project, where more space should be available, and sponsors can cover the tuition fee.

The Development Director's main focuses will be:

- Prospective Donors
- Case for Support & Brochure
- Website Development
- Tax Efficient Giving Advice
- CSR Training
- Increase Staff for Outreach & Advancement

AL stressed the importance of staff outreach and advancement. JM asked if the development department need to grow in terms of resources. AL confirmed that extra resources would be appreciated to help with the day-to-day activities connected to fundraising (i.e., to send thank you letters, issue tax receipts etc...).

KPI 2022 – 2025 were presented as follow:

- to maintain internal fundraising (such as the 5xMille, Christmas, Leaver's campaign etc...)
- to meet with 10 prospective donors annually
- to meet with 5 companies annually

- to receive major donations +€10K
- to establish 10 bursary places

The discussion moved on to Tax Consultancy.

AL explained that many charities promote fiscal benefits which are behind the donations.

This is something which AL would like to investigate further with a professional expert to receive clear answers on tax deductions and explore any possible opportunities for the school. **ACTION**

Committee members fully supported this initiative.

#### **4. AOB**

**Fundraising brochure** – a draft was sent to committee members by email a few days ago in order to provide AL with feedback.

The brochure was created in 2019 by CG and JM to be used during meetings with potential donors. This brochure will need to be updated.

AL would like to understand from Governors if a general brochure regarding the Bursary and Building Project is appropriate, or if two separate brochures are better.

Following a thorough analysis, the Committee suggested the following:

- to avoid the single brochure which includes all topics
- to custom a professional folder with some printed materials for donors
- flexible format (to allow future updates)
- to begin the brochure with a one-pager that clearly explains *WHY DONATE?*

#### **ACTION: AL to draft specific materials for the Bursary Fund**

The possibility of parents being able to make a donation in support of the school's Bursary Fund or other areas during the admissions process, perhaps in the application form, was also discussed. As well as giving the choice to scholarship recipients to renounce the monetary award if not needed to benefit someone else in need.

**5xMille 2020** - MF to provide the Committee with 2020 5xMille donations list.

MF mentioned that it is interesting to see that the number of families that chose BSM has decreased, but not dramatically.

The average contribution, instead, has been halved.

**ACTION AL:** It was agreed that the number of families choosing BSM for the 5xMille will be included in the presentation because it represents a more accurate target for the Development Team.

With no other business to discuss, the meeting ended at 10:40

**NEXT MEETING (Development Strategy – with AL) TO BE HELD IN FEBRUARY 2023**