Insights to Action: Why Donors Give to Independent Schools

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Workshop Objectives

You will walk away with...

An understanding of using demand-side perspectives to impact the way we innovate in our approaches to philanthropy

A basic understanding of the JTBD theory and NAIS’s research on Donor JTBD

A framework for unpacking and making progress on your advancement challenges

Systems thinking and action mapping tools that leverage Donor JTBD insights for innovation design

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Supply vs. Demand Side Thinking
Supply vs. Demand Side Thinking

Supply Side

Our new makerspace is going to change our educational experience, bring in more families, and help us stay competitive in the market.

Demand Side

Are you interested in donating to our new makerspace?

What about it is appealing to you?

Why?
Supply Side

Our new athletics center will be four stories, have a pool and an indoor track, and will have a great impact on our athletics program!

Demand Side

“Winding River’s athletics program gave me a home – a place that taught me what it was to be part of a team, and gave me friends that will be with me for the rest of my life.

I gave so others could find their home in Winding River’s athletics program.”

– Jason Lee, Class of ‘94

Donate Today
Overview of Jobs To Be Done (JTBD)
What is a Job to Be Done?

I used to think correlation implied causation.

Then I took a statistics class. Now I don't.

Sounds like the class helped.

Well, maybe.
A Job to Be Done (JTBD) is the progress that a person is trying to make in a particular circumstance. It includes an understanding of the functional, emotional, and social characteristics of the desired outcome the person is trying to achieve.
What is a Job to Be Done?

“Impactful” Donation

- Ensure that students in the future have access to the core experience that makes the school great
- Create new programming to fill a “gap” in the school’s educational approach
- Help the school cover its annual expenses to stay open
The Importance of Tradeoffs

Donor making gifts will inevitably have to make tradeoffs, sacrificing some things to gain others.

Tradeoffs are extremely important, as they demonstrate what donors actually value, as opposed to what they say they value.
The Forces of Progress

TWO FORCES THAT PROMOTE A NEW CHOICE

- PUSH of the situation
- PULL of the new solution

- BUSINESS AS USUAL
- STRUGGLING
- MOMENT
- NEW BEHAVIOR

HABIT of the present
ANXIETY about the new solution

TWO FORCES THAT BLOCK CHANGE
Discussion Questions

✓ What contexts are “pushing” people to give?
✓ What outcomes are “pulling” them to give?
JTBD for Independent School Donors
Donor Jobs Snapshot

**Job 1**
When the school has had a direct impact on me and my family and I feel a responsibility to give back, help me structure a donation that will have a meaningful impact, so I can ensure the long-term viability of the school and that future students have access to it.

**Job 2**
When the school has a gap in its education programs, curriculum, or facilities, help me structure a donation that contributes to creating a new program, curriculum, etc. so I can help improve students’ educational experiences today.

**Job 3**
When I know the school is operating at a deficit and the financial stability is at risk, help me structure a donation so I can ensure the school covers its deficit and continues to provide the positive experience to the current and future students.
Donor Job One

What "Pushes" Donors To Give?

- When my personal/family experience at the school was impactful
- When I am worried that this school experience will not be available to others in the future

What "Pulls" Donors To Give?

- So I can ensure the school will thrive in the future
- So I can ensure others will have access to this educational experience
- So I can support/endorse the school leadership and their strategies
- So I can say "thank you" to the school

"My school was my home away from home for over a decade. I learned to love learning and I made some of my best friends there. I want that experience to be there for children in the future."

"Tess", Donor in JTBD #1
Donor Job Characteristics

Job 1

Donors in JTBD #1 value the administration's goals and priorities over their own.

Donors in JTBD #1 are not especially concerned about the fund or campaign they are donating to, as long as it helps preserve (and sometimes expand) the school experience.

Donors in JTBD #1 define impact as long term, and are not worried about any immediate effect their donation will have on the school.
What's In

✔ Donation options that are focused on long term financial stability
✔ Donation options that ensure access to the experience for kids in the future
✔ Donation options that improve the facilities
✔ Donation options that increase the endowment
✔ Donation options that are aligned to the school leadership’s strategies and goals
✔ Donation options that will have a meaningful impact

What's Out

❖ Donations that cover short-term deficits
❖ Donations that change the core educational experience
❖ Donations that are simply for the operating fund and will not have a dramatic impact
What "Pushes" Donors To Give?

- When I believe the school’s educational experience could be improved by creating x
- When I struggle to find donations that will have a meaningful impact
- When I want to influence how my money is used

What "Pulls" Donors To Give?

- So I can improve the educational experience for the students at the school
- So I can have an impact as quickly as possible
- So I see the effects of the donation on students (my children as well)
Donor Job Characteristics

Donor Job Two

Donors in JTBD #2 are interested directing their gift to their own priorities, rather than trusting the administration to allocate funding.

Donors in JTBD #2 are not generally willing to invest in things that do not directly improve the educational experience, such as capital campaigns or improvements viewed as cosmetic.

Donors in JTBD #2 are interested in fast results that impact the program as quickly as possible.
Donor Job Two

**What's In**
- ✓ Improvements that directly impact the student’s educational experience
- ✓ Improvements that are meaningful to me personally (me and/or my family)
- ✓ Improvements that can happen quickly

**What's Out**
- ❌ Long-term financial stability
- ❌ General funds to cover operating deficits
- ❌ Long-term infrastructure improvements, big capital campaigns
Donor Job Three

What "Pushes" Donors To Give?

- When I know the school is operating at a deficit
- When I am worried that the school will not be able to continue if I don’t donate
- When I want other kids to be able to experience the school

What "Pulls" Donors To Give?

- So I can ensure that the school will cover its operating deficit
- So I can ensure that other kids will have the opportunity to experience the school

"I knew I had the means to give, and I knew that everyone does their part to help the school. Better I help students than pay for something else I don’t really need."

"Mike", Donor in JTBD #3
Donor Job Characteristics

Donor Job Three

Job 3

Donors in JTBD #3 value short-term cash more than long-term financial stability.

Donors in JTBD #3 value short-term cash over improving the educational experience.

Donors in JTBD #3 value unrestricted giving more than targeting donations to improve the school experience.
Donor Job Three

What's In

- Donations that contribute to the general fund
- Donations that create a surplus for future years
- Donations that leadership knows where to use and apply

What's Out

- Long-term infrastructure and capital campaigns
- Donations for changes to the educational experience
What contrasts do you see between the Jobs donors have for giving?

How can this help inform your advancement work?
Break
Insights to Action
What The School Wants To Do

Our new athletics center will be four stories, have a pool and an indoor track, and will have a great impact on our athletics program!

Donate Today

What the Donor Wants to Do

“Winding River’s athletics program gave me a home – a place that taught me what it was to be part of a team, and gave me friends that will be with me for the rest of my life.

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Make Your Impact Today
In preparing for 1-on-1 meetings with three lead gift prospects for the athletics center campaign, you realize that each is in a different donor job context.

**How might you make the athletics center campaign resonate differently to each donor job?**

What questions might a Job 1 donor ask about giving to build the athletics center? Job 2? Job 3?
Insights To Action: Project Level Innovation Design

- Imperatives for Change/Drivers of Strategic Innovation
- Applying Demand-Side Thinking and JTBD
- Unpacking for Clarity: Abstract Challenge to Concrete Prototypes
- Action Mapping Towards Implementation
- Using Systems Mapping for Innovation Design
Unpacking: Directions

Ambiguity & Abstraction

Challenge

Step 1
Pick a challenge facing your advancement team. Place it here.
This challenge can come from your strategic plan, research you’ve done with donors, or observations from the leadership team.

Unpack

Step 2
Ask your colleagues at the table what the phrase in the first box means to them.
Keep asking “why” until you get to the essence of what they are trying to explain.
Definitions should not be dissertations, but concise descriptors.

Organize

Step 3
Can any of the definitions be grouped into a category?
If so, group like definitions and name the group.

Unpack

Step 4
Determine a single thread to follow stemming back to the original definition.
Ask again for all the ways you could define that specific situation.
Write these down under the “redefine” column.

Prototype

Step 5
Analyze your “redefine” column.
Are these new definitions related?
What prototypes could you design to take action?

Clarity

What Might We Do?

Definitions should not be dissertations, but concise descriptors.
First-year parents are not participating in the annual fund and gala at the same level as other parents.

They don't understand the annual fund.

They don't have friends in the community.

They feel like their tuition payment is enough.

No one invites them...personally.

Parents don’t feel included in the school culture.

What We Might Do
Unpacking: Your Challenge

**Ambiguity & Abstraction**

**Challenge**
First-year parents are not participating in the annual fund and gala at the same level as other parents.

**Unpack**
- They don’t understand the annual fund.
- They don’t have friends in the community.
- They feel like their tuition payment is enough.
- No one invites them...personally.

**Organize**
- Parents don’t understand the role of philanthropy at the school.
- Parents don’t feel included in the school culture.

**Clarity & Specificity**
- "Bait and switch" concerns create tension.
- Families receiving aid feel like the AF gift is giving FA back.
- First time that many have been asked to give money.
- Don’t know what the AF covers that tuition doesn’t.

**What We Might Do**
- Partner every new family with a well-matched "host" for high-touch outreach.
- Differentiate participation pitches by fin aid status.
- Launch an annual fund video set that explains why it is essential.
- Engage a "First Year" campaign for families during the orientation process.

**What We Might Do**

**Clarity & Specificity**
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Systems Mapping for Prototype Design

EXTERNAL PRESSURES
1. Variety of family financial situations
2. Economic conditions
3. Satisfaction with school experience

RESOURCES
1. Budget
2. Marketing/comms team
3. Current parents
4. Current students
5. Videographer, animators, etc.

PROTOTYPE
Annual Fund Video Series

OUTCOMES
1. Inspire participation
2. Accentuate community
3. Clarity on what philanthropy does

METRICS
School
1. Participation rate
2. Total giving
3. Views/click - thru rate

Donor
1. Sense of community
2. "Now I get it"
3. Gave a gift

THE WORK
Write a script; secure testimonials from current parents and students; select production firm or in-house talent; build webpage; ensure clean database; leverage social media outlets

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#1: What’s your prototype?

#2: What outcomes do you hope to achieve?

#3: How will you measure success?

#4: What work needs to happen to effectively achieve your outcomes and hit your metrics?

#5: What resources do you need to get the work done well?

#6: What factors outside of your control might impact your ability to meet your outcomes and metrics?
Action Map

**AN ACTION MAP IS**
- A road map to solve a strategic problem
- A living document that outlines solutions

**AN ACTION MAP IS NOT**
- Just a task list
- The whole answer

**YOUR ROLE AS A LEADERSHIP TEAM:**
- Identify problems
- Shape the vision for solving problems
- Be the sounding board for the project team
- Be the person/team that will help the project lead link learning across teams

**YOUR ROLE AS A PROJECT LEAD:**
- Take the project vision and build tasks for team members
- Merge learning from each workstream to build solutions
- Work with the leadership team to make sure progress is being made
- Work with the leadership team on getting resources to solve strategic problems

**YOUR ROLE AS A TEAM MEMBER:**
- Use your expertise to help the team solve the problem
- Do research on ways to solve the problems
- Actively try to solve the strategic problem you have been charged to solve
- Do the tasks that are assigned
### Action Map

<table>
<thead>
<tr>
<th>RESTATE THE PROBLEM</th>
<th>PROTOTYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>What’s the core problem you are trying to solve and for which Job?</td>
<td>Note your prototype and primary outcome to solve the problem above. “We will ….(prototype))...in order to achieve….outcome).”</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IN SCOPE</th>
<th>OUT OF SCOPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>What activities should be included in this project? What’s achievable?</td>
<td>What activities should be excluded from this project? What are you NOT going to focus on today or in the near future related to this project?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ASSUMPTIONS</th>
<th>CONSTRAINTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>What things do you accept as true in relation in this project?</td>
<td>What limitations or restrictions might you encounter when implementing this project?</td>
</tr>
</tbody>
</table>
**ACCOUNTABILITY**

**Who should be on the team?**
- Leadership Sponsor/Team:
- Project Lead:
- Team Members:

**Who should be consulted, but not directly involved?**

**How will you measure progress in the next 7, 30, 60 days?**

**How and when will you measure success?**

**QUESTIONS TO ANSWER:** *What questions will the project team need to answer before they can start the work?*
MOCHA Team Management

- **MANAGER** | Assigns responsibility and holds owner accountable. Makes suggestions, asks hard questions, reviews progress, serves as a resource, and intervenes if the work is off-track.

- **OWNER** | Has overall responsibility for the success or failure of the project. Ensures that all the work gets done (directly or with helpers) and that others are involved appropriately. There should only be one owner.

- **CONSULTANT** | Should be asked for input or needs to be brought into the project.

- **HELPER** | Assists with or does some of the work.

- **APPROVER** | Signs off on decisions before they're final. May be the manager, though might also be the executive director, external partner, or board chair.

Source: https://blog.thinkcerca.com/project-planning-using-mocha
Questions?

Additional Resources

NAIS Research: Jobs-To-Be-Done Study on Independent School Donors

The NAIS Strategy Lab
Let’s Stay Connected!

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