



**More giving, more impact,  
more than consultants**

*Driving positive change for people, planet and place*

## **Giving Architects Education Advancement Services Overview**







## Our team

*What sets us apart is our team of passionate problem solvers and innovators. We are committed, responsible and flexible. With decades of experience between us, we boast top fundraising talent in New Zealand and Australia. With us in your team, you'll have the confidence needed to think big and succeed.*

We understand your mission is unique. And that's why we don't have a one-size-fits-all way of working. With our tailor-made solutions and proven track record, you can trust us to deliver. Whether you need a high-level strategic view or hands-on delivery, we'll commit to seeing your project through to fruition.



**Clive Pedley CFRE FFINZ**  
Director and Chief Executive | Giving Architects

*A thought leader and advisor continuing to raise tens of millions of dollars for great causes. Specialises in designing innovative philanthropy and impact investment models that enable money and purpose to work together.*



**Robert Brooke BSR Bsc. (Hons)**  
Senior Consultant | Giving Architects

*Robert brings in a wealth of fundraising experience from offshore and New Zealand and has been involved in the educational advancement space since 2016 as a Development Manager at King's College. Prior to that he managed numerous functions including; marketing, sponsorships, membership and subscription management and has extensive event experience including Super Rugby, Test Matches, Rugby World Cup 2011 and Motor Sport Hall of Fame in the United Kingdom.*



**Jon McQueen MFINZ**  
Senior Consultant | Giving Architects

*Jon carries proven success in fundraising, sponsorship, sales and marketing, in the United Kingdom, Europe and New Zealand. He was previously in a fundraising role which was integral to the growth and sustainability of Land Search and Rescue and was part of a number of high profile fundraising projects, including leading Strategic Fundraising for Experience Wellington and successfully leading a Capital Campaign at the British High Commission in Wellington.*



**Marie De Silva MBus MBA ACIM**  
Marketing & Operations Manager | Giving Architects

*Having transitioned to the social purpose sector after extensive experience in corporates, Marie brings a plethora of skills in leveraging digital presence and optimising digital outcomes for social purpose organisations keeping in mind the unique ecosystem in which they operate.*



**Carly Robertson**  
Copywriting Specialist | Giving Architects

*With more than 10 years of experience working for leading charities in New Zealand and the United Kingdom, Carly knows what makes donors tick. Her background lies in event fundraising and marketing, but she also has experience in corporate sponsorship and community fundraising. Carly is Giving Architect's go-to copywriter, specialising in developing compelling and donor-centric Case for Support documents.*



**Nigel Harris MBA CFRE FFIA GAICD**  
Strategic Counsel | Giving Architects Australia

*A Highly regarded non-profit sector leader specialising in philanthropy and effective fundraising. An outstanding track record in organisational growth and development with a unique range of experiences and insights in governance, executive leadership and applied fundraising practice.*



**Leigh Cleave MBA CFRE FFIA**  
Senior Associate | Giving Architects Australia

*Dynamic in working with purpose driven organisations to build healthy and sustainable futures covering all aspects of fundraising across healthcare, medical research, international development, faith-based and community welfare sectors.*



**Stephanie Wise B.Des, Dip, MFIA**  
Associate | Giving Architects Australia

*Stephanie is a passionate fundraiser with over 10 years of experience in events and fundraising across the not-for-profit and arts sectors. She has developed skills in events and project management, community fundraising, philanthropy, appeals, volunteer management, digital fundraising, registration, and ticketing platforms.*



**Bridget Brown BSc, BA, GradCertBus**  
Associate | Giving Architects Australia

*Bridget is a communications professional who has worked for hospitals and not-for-profit organisations in the areas of communications, marketing, event management, project coordination and public relations in Australia and the United Kingdom. She has worked as a consultant for clients in the healthcare sector, the arts and community organisations.*



## *Our approach*

*We'll go above and beyond to find the right solution for your mission.*

At Giving Architects, we're passionate about helping organisations like yours make a lasting impact. Our five D approach combines tailored solutions, tried and true methods, and an unwavering commitment to your success. When you partner with us, here's what you can expect:

### 01

#### DISCOVERY

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We begin by getting to know each other. Our goal is to understand your unique mission and where you aspire to be. Through open and candid discussions, we'll uncover the problem you need to solve.

### 04

#### DELIVERY

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Once the approach has been agreed upon, our solution is delivered. From comprehensive reports of our findings to detailed strategic and implementation plans, we'll guide you through every step of the process.

### 02

#### DEEP-DIVE

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During this stage, we engage in meaningful discussions with you and your wider community. By going deeper into your pain points, we determine the right solution tailored to your specific needs. Your input is invaluable as we craft a strategy that aligns with your vision.

### 05

#### DRIVE FORWARD

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Our commitment doesn't end with the delivery. Many clients choose to keep us on board as advisors to drive their projects forward for maximum impact.

### 03

#### DEVELOPMENT

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Next, we leverage the expertise and experience of our team and your unique knowledge to develop a bespoke solution. By combining innovative ideas and best practice, we'll design a well-considered strategy that will maximise your impact.





# Overview of the Advancement Strategy Development Process

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Giving Architects has vast experience in the development and implementation of effective advancement strategies across a broad spectrum of educational institutions. We also specialise in typical investments and returns, both financial and non-financial, in New Zealand and internationally. By applying our insights and methods, you will have a sound basis for effective fundraising outcomes and improved community and alumni relations.

## What is Advancement?

Advancement literally means 'moving forward'. It can be translated into "a set of strategies and programmes that encompass the areas that support the financial stability and continuous improvement of any educational institution for the benefit of its students, their whānau and the greater community." Many educational institutions (large or small, public or private) are operating or moving towards operating one combined Advancement Office encompassing the disciplines of: Marketing & Communications; Admissions & Enrolment; Development & Fundraising; Alumni Relations & Community Engagement, and Archives.

## What does best practice Advancement look like?

Best practice Advancement in educational institutions bring all four of the above disciplines together, working to achieve the best possible outcomes for the educational institution. It sees Advancement as a continuum that: builds authentic relationships with the whole family during the admissions and enrolment process, promotes the student's successful educational journey and family's active involvement in school life, maintains a sense of belonging well beyond leaving/graduation to all 'alumni' of the educational institution.

(NB: When we say Alumni, we consider more than just "past students". Alumni are all members of the educational institution community, including graduates, all former students, former Faculty, Staff and Coaches, all former parents, all former Board Trustees, Proprietor's Board etc).

## Why an 'Advancement' Strategy?

An Advancement Strategy has the power to future proof and expand revenue sources that support an educational institution's strategic priorities. By developing a long-term philanthropic 'culture of giving' through an effective Advancement Programme, voluntary gifts are actively sought to support the operating budget, increase the endowment, and enhance the facilities, campus, and programmes of the educational institution. The students, whānau and wider community feel a true sense of belonging, through a lifetime of relevant and beneficial engagement, fostering the educational institution's mission, vision and values.

Critical to assessing the right Advancement Strategy, much more than just knowing 'best practice', is a better understanding of the educational institution's current position and what it can do to effectively create and sustain a valuable 'culture of giving'. To that end, we make sure that we assess, understand, and contribute to:

- Governance policies that support all Advancement outcomes.
- Relationships with a range of aligned supporters and stakeholders.
- Key messages from a donor-centric perspective.
- How to bring the best of the educational institution to an interested giving audience.
- Internal capacity to ensure the school can implement a strategy with a starting point that can be effectively delivered, as well as understanding the resources required for further fundraising growth.



## ***Our approach***

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To achieve the ideal outcomes from our Advancement Strategy Development Process, within a reasonable time frame, Giving Architects will undertake the following actions:

- Review any existing and relevant material (former appeals, communications, fundraising strategy documents) to better understand the educational institution's vision, unmet needs, and aspirations, which could be effectively expressed in a donor-centric draft Case for Support.
- Engage with and understand the leadership and key stakeholders' priorities and ensure there are no gaps in understanding or unaligned expectations.
- Identify and prioritise key stakeholders to be involved in informing conversations.
- Prepare for specific stakeholder interviews (either in-person or online meetings depending on prevailing circumstances) in a manner that will best inform the development of an effective Advancement Strategy.
- Conduct 15 – 20 interviews with prioritised key stakeholders to gain insights, discuss relevant information and seek opinions on admissions, the development of future fundraising initiatives, as well as community and alumni engagement activities.
- Prepare a comprehensive report including findings, analysis, and recommendations as well as an informed and sustainable Fundraising Strategy supported by an Advancement Strategy and Programme for the next three years. The recommended strategy will provide an action plan designed to effectively build a valuable 'culture of giving' based on a strong internal culture of philanthropy, achieve increased fundraising revenue and improve community and alumni relations. The plan will provide a foundation that educational institutions can implement.
- Present the report and recommendations to Trustees and Leadership.
- Upon approval of the strategy, expected in month three of four, commence with the strategy implementation and conversion of early high-value donor conversions.
- Support, train and advise all staff involved in the overall Advancement Strategy.

The key stakeholders to interview during this process will be an appropriate mix of:

- Educational institution leaders (Executive, Board, Foundation) – 6-9 people.
- Educational institution special interest group leaders - 4-5 key representatives.
- Existing donors or supporters – 3-4 people.
- Identified prospective supporters – 3-6 people.



## ***Our approach contd...***

Based on the initial information provided and what we understand the educational institution is looking for from this process, Giving Architects is proposing to gauge stakeholder and potential supporters' views and opinions to not only inform a recommended Advancement Strategy but also assess prioritised prospective donor interests, capacity, and philanthropic ambition.

From these stakeholder meetings and associated work, Giving Architects will identify where the best opportunities exist that can be realised in the development of a comprehensive Advancement Strategy. The strategy will include timing and an appropriate level of future investment required to effectively implement specified fundraising programmes and stakeholder engagement activities within the scope of the Advancement Strategy.



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- What existing engagement activities are successful and how is this determined? Including current parents, past parents, and past students.
  - What existing fundraising activities meet the philanthropic ambitions of the educational institution's donors and potential donors?
  - How is the success (or failure) of fundraising and Advancement activities measured?
  - What donor-centric messaging resonates with which audiences?
  - How to best present the educational institution's charitable purpose aligned with the school's vision?
  - What resource or skillset capacity is missing from the existing Advancement functions at the educational institution, if any?
  - How 'ready and able' is the database, and can data effectively inform the strategy?
  - How is the educational institution's Alumni Relations programme working? And how is the working structure and relationship functioning with the alumni for future Advancement success?
  - What could function best for a successful Major Donor programme at the educational institution?
  - How can the educational institution best activate an effective Gift in Wills/Bequest programme?
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### **Christ's College**

"I really enjoyed working with Giving Architects. Recently they helped our team here at Christ's College with professional development and were very generous with their time and sharing their knowledge and expertise with us. It has been a great experience and we are still working with them now, and that's the great thing. There is an ongoing relationship. Even when the work around professional development is over, we know we can still reach out."



#### **Shelley Keach**

Senior Development Manager  
Christ's College



### **Hawke's Bay Community Fitness Centre Trust**

"Giving Architects has much experience in the successful capital raising for a wide range of projects. The team can be completely relied on to research and develop a campaign that will succeed, prepare and deliver timely reports and provide wise counsel and advice along the way. They make a 101% commitment to the project, including making changes to the fundraising plan as changing circumstances dictate. Giving Architects steps up in demanding circumstances and will not let you down. I can thoroughly recommend Giving Architects."



#### **Sir Graeme S. Avery**

Former Chair  
Hawke's Bay Community Fitness Centre Trust



### **Auckland Grammar School**

"The expertise of Giving Architects was crucial in moulding a bespoke campaign strategy for Auckland Grammar School and coming up with new concepts and ideas on how to raise funds for our campaign. When we set out it was a huge target and the thing I am most proud of in this campaign is that through this process we managed to achieve our outstanding goal of raising \$16.65 Million."



#### **Daniel Reddish**

Director of Advancement  
Auckland Grammar School



### **The Selwyn Foundation**

"The team of Giving Architects became the Selwyn team, and it was like having a fundraising team there, working together with us. They provided us with good structures and processes with weekly meetings and monthly reports to then keep us on track. Often with consultants, it's very academic and it means something when they are there, but when they're gone, you are left with; now what? But Giving Architects gave The Selwyn Foundation that route map on how best to progress".



#### **Karen Coleman**

Director, Marketing & Communications  
The Selwyn Foundation

## **The Giving Architects Experience**

# **A proven track-record of satisfied clients and trusted partnerships**

**Want to know what it's like to partner with us? Hear it for yourself from our very inspiring (and very satisfied!) clients.**

**[Our client stories](#)**







## Our values

*Our core values (or what we like to call our five C mantra) are the fundamental principles underlying our mission.*



### CHANGE MAKERS

As passionate and committed change makers, driving positive change for people, planet and place is at the heart of everything we do. Our mission is your mission. We'll dedicate ourselves to your cause and won't be satisfied until we see results.



### CHARACTER

You're accountable to your stakeholders and donors, so trust is paramount. That's why you can trust us to do the right thing, every time.



### COLLABORATIVE

We're here to listen. To you, so we can understand your mission. And to others – experts, industry leaders and researchers – so we can apply the best, most up to date information to your project.



### CREATIVE

We're curious and creative thought leaders, exploring new ideas and ways of doing things for the greater good. We'll challenge the status quo, always.



### CLIENT-CENTRIC

In the same way we encourage you to be donor-centric, we're relentlessly client-centric. More than fundraising consultants, we become a vital part of your team.





[www.givingarchitects.com](http://www.givingarchitects.com)

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