



# WESTMINSTER SCHOOLS ATLANTA



## SUCCESS STORY



### \$8.2m

#### Increased Gifts

Gifts that closed at a higher amount than forecasted.



### \$4.4m

#### Closed Faster

Gifts that closed faster because of the Plus Delta methodology and tools.



### 358x

#### ROI

Westminster raised \$358 in new and increased gifts for every \$1 they invested in their team.

#### Independent School partners with Plus Delta to help their Advancement Team create the "Westminster Way"

Since it's opening in 1951, Westminster Schools of Atlanta has upheld a tradition of excellence in academics, athletics, and fine arts. Nestled in the heart of Georgia, Westminster is a co-educational, Christian independent day school that serves students from pre-kindergarten through grade 12 with a distinctly different educational experience.

As an inclusive Christian school, Westminster honors the substance and practice of other religions and seeks to support and encourage students of all faiths, beliefs, cultures, and backgrounds. This value is reflected in the fact that nearly \$6 million in financial aid is awarded each year to make the Westminster experience accessible to a wide range of talented students in the Atlanta area. And to help make the school even more accessible to a diverse audience, full tuition covers only a portion of the actual costs. Therefore, Westminster relies on a robust advancement program to be able to put its values into action.

While Westminster had achieved fundraising success, raising between \$15-25 million on an annual basis, school leaders recognized an opportunity to further strengthen their efforts. Their gift officers possessed individual talents, but lacked common language and a shared approach. Consequently, there was very little consistency of experience among alumni, parents, and other donors. Moreover, while officers were skilled at building strong relationships with prospects, they often elongated the time to solicit and close gifts.

*"Our gift officers now view themselves as professional facilitators who are experts in matching donors' desires to institutional priorities and needs."*

**Lauren Flores**

Associate Vice  
President for

Institutional Advancement

With these growth opportunities in mind, Westminster began a partnership with Plus Delta in 2020, just prior to the pandemic. Six members of Westminster's Advancement team participated in the nine-month Discipline of Frontline Fundraising (DFF) program. Together, they learned the fundamentals of a defined Donor Engagement Process™ (DEP), and they utilized communication tools designed to help identify shared priorities with prospective donors. By utilizing the tools and vocabulary they learned, the gift officers accelerated the solicitation process by asking better questions that led to relevant information and timely next steps.

# LONG-TERM SUCCESS

Changes in gift officer behavior fostered internal collaboration, use of a common fundraising process, and a shared vocabulary. The team further demonstrated their commitment to the methodology by integrating DEP™ tools into day-to-day conversation and internal role play. By sharing personal experiences and modeling behaviors, the leadership at Westminster also helped establish a strong culture of partnership, continuous inquiry, and consistency in practice.

“As a collective, we built a common language, which we practice both casually and in prospect management meetings, and we have embedded it in our systems to ensure that it is now the ‘Westminster Way,’” said Emilie Henry, Vice President for Institutional Advancement.

Advancement leaders also noticed a new level of confidence among the gift officers. “Our gift officers now view themselves as professional facilitators who are experts in matching donors’ desires to institutional priorities and needs,” said Associate Vice President for Institutional Advancement, Lauren Flores. The team also began moving prospects through the pipeline at a much faster pace—even disqualifying prospects with a surety that was not present prior to going through the DFF program.

## QUALITATIVE RESULTS

### Gained Confidence

The team has grown in confidence and congeniality and developed a vocabulary for sharing more about their practice in an effort to help one another improve.

### Challenging Prospects

Gift officers now combine effective communication tools with process discipline and are less likely to get stuck with a donor and can better maximize each donor’s giving potential.

### Aligned Goals

The DFF program has helped the fundraising team develop a shared understanding and focus on the institutional priorities instead of focusing on individual gifts.

The gift officers’ behavioral changes translated into financial results, too. Upon completing the Discipline of Frontline Fundraising program, participants identified 43 gifts that were closed (or pending), due to the methodology, tools, and coaching provided throughout the program. Those gifts add up to more than \$23 million—an amount more than 350 times larger than Westminster’s original investment in the DFF program. By talking about impact, not defaulting to minimums, and using the tools learned to guide a donor to the institution’s priorities, one gift officer was also able to turn a \$2.5 million committed gift into a \$10 million gift. “Each of the tools play a role in solidifying where we are in the process with a donor, making next steps clear to both the gift officer and the donor”, said Emilie Henry.

“While Plus Delta is best known for our work in higher education and healthcare,” says Founder and CEO Guy Hart, “Westminster is our thirteenth successful independent school collaboration. We are pleased to partner on advancing such an important mission at a critical developmental time for children, and proud that our work together fostered a collaborative learning and growth culture for the development team.”

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**Emilie Henry**  
Vice President  
for Institutional  
Advancement