APPROVED

Hill View Montessori

Minutes

Development Committee Meeting

Date and Time
Tuesday June 9, 2026 at 6:30 PM

Location
Remote
Meeting ID: 305 974 6197
Passcode: 181313

Committee Members Present
A. Fergus (remote), H. Herklotz (remote), J. Gibbons (remote), J. Greene (remote), J. Landry (remote), M. Borden (remote), S. Stecher (remote)

Committee Members Absent
H. Pearson

Guests Present
T. Polanco (remote)

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

J. Landry called a meeting of the Development Committee of Hill View Montessori to order on Tuesday Jun 9, 2026 at 6:31 PM.

C. Approve Minutes

J. Landry made a motion to approve the minutes from Development Committee Meeting on 05-12-26.
S. Stecher seconded the motion.
The committee **VOTED** to approve the motion.

II. Development

A. Art Walk Update

- Participated in the Haverhill Art Walk, booth staffed by Hannah, Jeff, and several volunteers.
- Positive community engagement:
    - Spoke with current students, families, alumni, and prospective families.
    - Received strong feedback about the school's reputation and community perception.
- Event served primarily as a visibility and relationship-building opportunity rather than a fundraising effort.
- Connected with local elected officials, including the Mayor and Representative Vargas.
- Consensus that community presence and accessibility are valuable for future outreach efforts.
- Next Art Walk scheduled for September 26, committee expressed interest in participating again.
- Discussion regarding volunteer needs:
    - Volunteers created a strong visible presence.
    - Future events may require fewer volunteers due to better understanding of event logistics.
    - Hannah shared upcoming Phillips Exeter Academy alumni networking reception:
        - Opportunity to connect with potential major donors.
        - Related to an upcoming alumni magazine article featuring Hill View's implementation of the Harkness Method in the middle school.
    - Discussion centered on balancing community outreach efforts with larger donor cultivation opportunities.

Questions/Discussion

- How can future community events be leveraged for both visibility and donor development?
- What level of volunteer participation is needed for future Art Walk events?

B. Proposal - Community of Service Award/Event

- Jeff presented a proposal for a "Community of Service Award" to be incorporated into the annual fundraising event (Rock & Roll Bingo or similar event).
- Purpose:
    - Recognize individuals who have significantly contributed time, service, leadership, or financial support to the school.
    - Re-engage former board members, volunteers, and supporters.
    - Strengthen long-term donor relationships.
- Proposed format:
    - Incorporate a 30–45 minute recognition segment into the existing fundraising event.
    - Maintain the event's fun and community-focused atmosphere.
- Discussion included:
    - Potential recognition wall, plaques, or permanent acknowledgments.
    - Honoring individuals before long periods pass without recognition.
    - Using recognition strategically to encourage future engagement and giving.
- Initial examples of potential honorees included former foundation and board leaders who provided substantial service.
- General support expressed by committee members.
- Jeff will continue refining the proposal and coordinate with Foundation leadership regarding implementation and timelines.

Questions/Discussion

- Who would qualify under the eligibility criteria?
- How should recognition be structured and memorialized?
- How can the Foundation and Development Committee collaborate on implementation?

C. Summer Development Plan

DonorPerfect CRM Implementation

- Jeff and Hannah reviewed recently purchased DonorPerfect software.
- Annual cost approximately $2,000.
- Features discussed:
    - Donor management and relationship tracking.
    - Integration with donation processing and QuickBooks.
    - DonorSearch wealth-screening capabilities.
    - Prospect identification and donor capacity analysis.
    - Task assignments and relationship management.
    - Segmented communications and donor newsletters.
- Training expected within the next several weeks.
- Committee agreed software will significantly improve fundraising infrastructure and prospect research.

- Discussion around donor research ("wealth prospecting") and industry best practices for donor cultivation.

Fundraising Messaging and Materials

- Committee discussed need for a unified fundraising story and donor pitch.
- Existing brochure materials viewed as a strong starting point.
- Discussion focused on:
    - Tailoring messaging to individual donor interests.
    - Building relationships before making fundraising asks.
    - Developing a compelling institutional narrative.
- Andy's previously shared pitch deck identified as a potential foundation for future materials.

Summer Planning Session

- Strong consensus that a longer in-person strategy session is needed.
- Goal:
    - Refine fundraising messaging.
    - Review and develop pitch materials.
    - Establish donor cultivation strategy.
- Target timeframe:
    - Early to mid-July preferred.
    - Jeff with reach out to coordinate scheduling.

Prospect Research Strategy

- Discussion on developing systematic donor prospecting processes.
- Emphasis on:
    - Understanding donor interests, values, affiliations, and relationships.
    - Leveraging board, staff, alumni, and parent connections.
    - Using DonorPerfect and LinkedIn to identify relationship pathways.
- Hannah proposed regular prospecting meetings separate from regular Development Committee meetings.
- Committee generally supported ongoing prospect review and cultivation discussions.

Facilities and Donor Experience

- Jeff shared plans for minor facility improvements near the school's entrance and administrative areas.
- Improvements include:
    - New carpeting.
    - Updated furniture.
    - Creation of a more welcoming visitor space.

- Goal is to improve first impressions for prospective donors and visitors.

Questions/Discussion

- How should the school's fundraising narrative be framed?
- What donor information should be collected and tracked?
- How frequently should prospecting meetings occur?
- What materials should be developed before donor outreach begins?

D. FY27 Goals

- Agreed to postpone detailed FY27 goal-setting until after summer planning work is completed.
- Immediate focus areas:
  - DonorPerfect implementation.
  - Development of fundraising messaging and materials.
  - Prospect identification and cultivation processes.
  - Planning and execution of donor engagement strategies.
- Committee agreed these foundational activities will inform future annual goals.

Committee Structure and Operations

- Discussion regarding coordination between the Development Committee and Foundation.
- Considered combining meetings but determined separate meetings remain necessary.
- Agreed importance of maintaining Foundation representation at Development meetings and vice versa.
- Hannah noted capacity concerns related to attending multiple committee meetings.
- Foundation representatives committed to maintaining communication and participation.

Leadership Discussion

- Jeff shared concerns regarding increasing workload and multiple leadership responsibilities.
- Noted possibility of transitioning Development Committee chair responsibilities in the future.
- Invited Andy and Scott to consider potential leadership opportunities moving forward.
- No decisions made; discussion to continue in coming months.

Questions/Discussion

- Should committee leadership responsibilities be redistributed?

- How can Foundation and Development Committee communication be strengthened?
- What goals should be established once summer planning is completed?

III. Closing Items

A. Agenda for Next Meeting

- Circulate availability for July meeting/work session.
- Continue developing Community of Service Award proposal.
- Coordinate DonorPerfect onboarding and training.
- Committee agreed to review pitch deck materials prior to summer strategy session.
- Development Committee meeting schedule to remain on the second Tuesday of each month at 6:30pm for next school year.

B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 7:32 PM.

Respectfully Submitted,
J. Gibbons