




Securing Financial Freedom:

Weaning from Title IV through Integrating Financial Management with Advancement!

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AGENDA

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1. Steps to Integrating Functions
 2. Producing Results to Drive Revenue
 3. Reviewing Self-Assessment
 4. Q & A



Steps to Integrating Financial Management & Advancement!

Process steps to Integrate Functions

1. Planning is a “Team Sport”

- ✓ **Work together to identify objectives & deadlines for both functions. Use shared tools, i.e Google Sheets / Calendar. Meet jointly to ensure alignment.**

2. Budgeting by Collaborating

- ✓ **Build a joint case for expenses & revenue on yearly budgets, then reconcile monthly. Present jointly to other departments.**

3. “Boot Camping” for Success

- ✓ **Each function should provide ongoing training & peer coaching to their counterpart, set up a “buddy” system & incorporate in all onboarding going forward.**



Process steps to Integrate Functions

4. Create a shared “Lexicon”

- ✓ Establish a common language & set of metrics. Build a simple “cheat” sheet of terms & FAQs & report outcomes to the rest of administration.

5. Meet your new “Best Friend”

- ✓ Do job shadowing, sit in on each other’s meetings, schedule regular joint meetings, break some bread together... just-for-fun, co-locate offices.

6. “To boldly go...”

- ✓ Integrate enrollment management, accounting & fundraising systems. Advocate for college-wide collaboration, reduce duplication, look for process improvement.



Steps to Drive Revenue



Start with a systematic, comprehensive & sustained effort to build a Culture of Philanthropy within your school.



- ✓ Do you have a unified, comprehensive & measureable Integrated Plan?
- ✓ Does Administration, Staff & Board know & fulfill their role in development?
- ✓ Do you have a Resource Development Plan that includes major gifts?

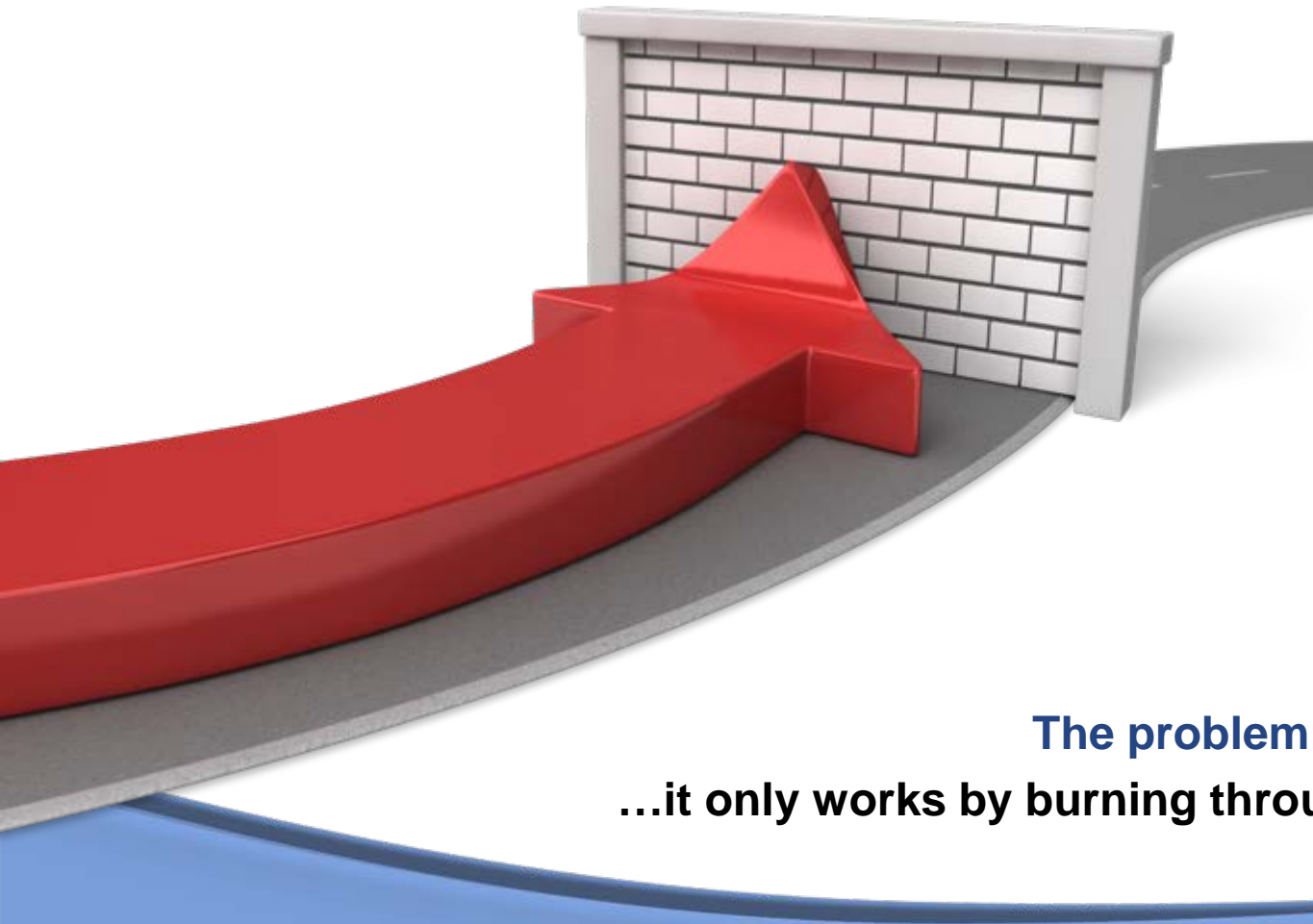


approaches to... ...resource development

2 of the following approaches are typical, however, can become stale & counterproductive in building long-term relationships with increasingly younger, sophisticated & skeptical donors!

1. Technique-Driven

Events, Mail, Phone, Annual Alumni Appeal, Online, etc.



**The problem: It's a numbers game...
...it only works by burning through 1,000s of prospects**

2. Institution-Driven

We're making a difference in the lives of our students...

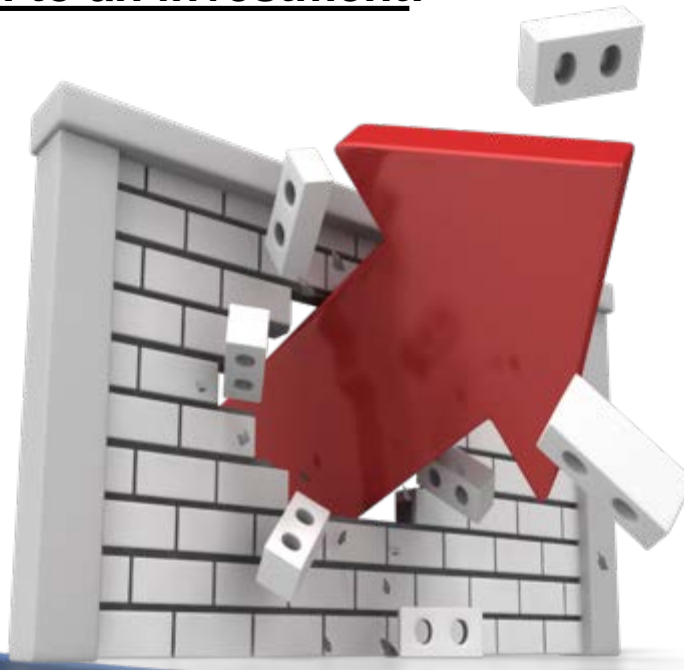


*We're good stewards of your gifts...
Our programs are world-class...
We are changing the world...*

The problem: It's all about you!!!

3. Donor-Driven

- ✓ How can we help a donor fulfill their Christian values, personal philanthropic goals or family tradition by making an investment with our College?
- ✓ What tasks must we perform & what systems do we need to put in place to build long-term relationships with new & existing donors?
- ✓ This approach is based on “earning the right” to ask for a big gift & transforms giving from a transaction to an investment!





A. CASE FOR SUPPORT



B. PROSPECT IDENTIFICATION

CREATIVE EVENT
INTRODUCING
CASE FOR SUPPORT

NON-FUNDRAISING
OPPORTUNITY

7594632

C. AWARENESS EVENTS

C. Awareness Events

Begin to earn the right to ask for a big gift by inviting donor prospects to learn about your school's Case for Support!

- ✓ **Creatively-themed, unique venue**
- ✓ **Personalized invitation**
- ✓ **Strong Host Committee to build credibility**
- ✓ **Fun, entertaining & inspiring program**
- ✓ **Introduce the Grand Vision for the school's future**
- ✓ **First step to earn the right to ask for a major gift**
- ✓ **NON-FUNDRAISING!**



D. PROSPECT CULTIVATION

If you've done it right... this is the easy part

- ✓ Meet in person & in private
- ✓ Provide individualized donor prospectus
- ✓ Review investment opportunities & naming rights
- ✓ Underscore your role as a “problem solver”
- ✓ Execute their Investment Pledge commitment
- ✓ Build in ongoing nurturing & engagement



E. SOLICITATION PHASE

✓ **Collaboration Self-Assessment?**

✓ **Takeaways?**

✓ **Q & A**

Thank You!



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