Securing Financial Freedom: Weaning from Title IV through Integrating Financial Management with Advancement!

John Curtis & David Sayers

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AGENDA

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.
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 & measurable Integrated Plan?
- Does Administration, Staff & Board know & fulfill their role in development?
- Do you have a Resource Development Plan that includes major gifts?
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!!!
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
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
✓ Collaboration Self-Assessment?
✓ Takeaways?
✓ Q & A
Thank You!

Integrated Organizational Development, Inc.
www.iodinc.com

John Curtis • 407-493-7323 • jcurtis@iodinc.com

David Sayers • 540-808-7997 • dsayers@iodinc.com