

The Role of the President/Principal in Advancement

Larry Furey

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*“Advancing the Mission”
is a shared responsibility.”*

Advancement is NOT a Random Exercise

- Have a clear Vision for Advancement
- Define a Comprehensive Model for the Program
- Develop an Organizational Structure (small, medium, large)
- Align Personnel by Core Function and Responsibility
- Provide the Budgetary Resources for Success
- Host Team Meetings – frequently and consistently
- Develop an Office Action Plan by each Component
- Establish a Master Calendar for Advancement
- Evaluate, Assess, and Improve

ADVANCEMENT

“Advancing the Mission”

Strategy and Operations

- Advancement Operations
- Constituent Relations
- Communications/Branding/Public Relations
- Volunteer Management
- Strategic Planning
- Research
- Stewardship

Revenue

- Enrollment Management
- Special Events
- **Annual Fund**
- Major Gifts
- Capital Campaign
- Planned Giving

Key Components to a Comprehensive Advancement Program®



Ministry of Advancement

- We are called to ministry
- We are faith-filled people
- We are servants for the stewardship of others
- The Holy Spirit leads us
- The power of prayer sustains us

5 Fundamental Elements of a Comprehensive Advancement Program

- 1. Message:**
A mission/vision/purpose that is compelling
- 2. Communication:**
The ability to appropriately communicate with any constituent
- 3. Engagement:**
Opportunities to provide constituents with a compelling experience
- 4. Service:**
Accurately and efficiently handling a constituent's interaction with the institution
- 5. Support:**
The full backing of the institution, its resources and its administration and board

Strategy and Operations



Advancement Services

- "DATA GATHERING"**
- Budget and Staffing Plan
 - Advancement Management
 - Gift Recording
 - Correspondence
 - Team Meetings
 - Office Protocol
 - Agendas and Notices
 - Job Descriptions
 - Archives
 - Professional Development
 - Gift Acceptance Policies and Procedures
 - Technology Support

"Information is Power"
"Data Drives Strategy"

Constituent Relations "RELATIONSHIP BUILDING"

- Social Activities
- Online Community
- Educational Programs
- Outreach/Service
- Networking Activities
- Web-Based Social Networking
- Spiritual Programs
- Family Oriented Programs
- Affinity Programs

Programming Profiles (BY AGE/CATEGORY/PROGRAMMING TYPE)

Age 18-22	College Age	Social/Online
Age 23-29	Young Alumni	Social/Networking/Online
Age 30-42	Parent Age	Family/Education/Networking
Age 43-49	Career	Education/Networking/Service
Age 50-59	Established	Education/Service/Spiritual
Age 60-69	Retired	Family/Service/Spiritual/Social
Age 70+	Senior	Spiritual/Family/Social

Constituencies "PRIMARY (#1) / SECONDARY (#2)"

	#1	#2		#1	#2
• Alumni			• Grandparents of Alumni		
• Board Members			• Neighbors		
• Business Community			• Parents of Alumni		
• Current Parents			• Partner Parishes		
• Current Students			• Partner Schools		
• Elected Officials			• Parishioners		
• Faculty/Staff			• Predecessor Schools		
• Foundations			• Religious & Clergy		
• Friends			• School Vendors		
• Grandparents					

Marketing, Branding, and Communications "INFORMING"

- Branding**
- An Organizational Promise
 - A Mark of Trust
 - Your Institutional DNA

- Internal/External**
- Newsletter
 - Parent All Constituent
 - Advancement Notes
 - Updates to Faculty/Staff
 - "Pastoral" Letters
 - Web Page
 - School Magazine
 - Annual Report
 - Press Relations
 - Holiday Cards
 - Marketing Materials
 - School Signage

- Core Components**
1. Vision
 2. Message
 3. Audience
 4. Content
 5. Design
 6. Distribution
 7. Frequency

Volunteer Management and Governance "INVOLVING"

- Volunteer Groups**
- a. Parents Association
 - b. Alumni Association
 - c. Parents of Alumni Association
 - d. Booster Clubs

- Board Committees**
1. Mission Integration
 - a. Catholic Identity
 - b. Service & Outreach
 2. Finance
 - a. Budget
 - b. Investment
 3. Advancement
 - a. Communications
 - b. Enrollment Management
 - c. Special Events
 - d. Annual Fund
 - e. Major Gifts

- a. Capital Campaign
- b. Planned Giving
- c. Stewardship
- d. Technology
 - a. Curriculum Integration
 - b. Professional/Staff Training
 - c. Troubleshooting
- e. Facilities
 - a. Master Plan for Campus
 - b. Maintenance Audit/Plan
 - c. Nomination/Governance

"Model over Membership"

Strategic Planning "VISIONING"

1. Institutional
2. Advancement
3. Curriculum
4. Campus Master
5. Financial

Research "IDENTIFYING"

1. Database Review
2. Rating and Screening
3. Electronic Research
4. Individual Research

"Information is Power"

Stewardship "THANKING"

- Acknowledgements
- Phone Call
- Recognition
- Naming
- Annual Report
- = Next Gift

"7 Ways to Thank a Donor"



The Five I's of Advancement

1. Identification
2. Information
3. Interest
4. Involvement
5. Investment



Revenue

Non-Advancement \$\$\$ Dependent Activities

1. Raffles
2. Lottery Calendars
3. Bake Sales and Bazaars
4. Entertainment Books
5. Candy Sales and Wrapping Paper
- Not Mission Driven
- Not Segmented
- No Relationship Building
- Limited Dollar Potential

"Old School Fundraising"

Enrollment Management

- Understand Demographics
- Assess Affordability
- Optimize Enrollment
- Maximize Collection of Tuition

Enrollment Management Funnel



"A Lifetime Relationship"



Special Events Types

1. Auctions
 2. Golf Tournaments
 3. Legacy Galas
- Four Criteria**
1. Build Community
 2. Raise Money
 3. Celebrate Mission/Vision
 4. Cultivate Prospects

"Special Events Have A Life"

Annual Fund

"The Trunk of the Tree"

- Five Methods**
1. Personal Solicitation
 2. Direct Mail
 3. Phone
 4. E-Solicitation
 5. Text

- Five Types of Gifts**
1. Research
 2. Recapture
 3. Increase
 4. Invite
 5. Transition

"Commitments Not Pledges"

Major Gifts

Targeted Gifts for a particular purpose in the amount of \$25,000+ toward a strategic objective proposed by faculty & staff, approved by the administration and ordered by the Board on an annual basis.

Seven R's of a Solicitation

1. research
2. rehearse
3. remember
4. relax
5. recall
6. recommend
7. recognize

"Major Gifts are a Contact Sport"

Capital Campaign

"Cumulative Major Gifts"
An effort to raise significant dollars for objectives rooted in the Strategic Plan

- Needs Assessment
- Strategic Plan
- Constituent Survey
- Prospect Research
- Case Statement
- Awareness Sessions
- Feasibility Study
- Campaign Plan
- Campaign Leadership
- Campaign Timeline
- Collateral Materials
- Solicitation Training
- Gift Recording
- Stewardship

PROSPECT FUNNEL

- Identification
- Research
- Assignment
- Cultivation
- Solicitation
- Stewardship

"Success"

Planned Giving INITIAL STEPS

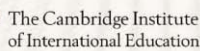
1. Planned Giving Advisory Committee
2. Planned Giving Policies
3. Planned Giving Recognition Society
4. Identify "Loyals"

Types of Planned Gifts

- Bequests
- Charitable Trusts
- IRAs
- Insurance
- Annuities
- Deferred Gifts



OUR STRATEGIC PARTNERS



The President's Role in Advancement

- You are the “Chief Advancement Officer” and embrace your advancement strategy & goals
- You establish the culture of philanthropy throughout the school
- You hire a strong Director of Advancement that will partner with you, and compliment your skills
- You provide the resources to enable your advancement program to succeed

The President's Role in Advancement

- You exude passion for your mission
- You have the best understanding of the vision
- You tell the stories that will generate the gift
- You have a critical relationship with your top donors and prospects
- You facilitate the Board's support for all fundraising initiatives

The Director of Advancement's Role

- You supervise all advancement activities
- You organize and manage the Capital Campaign
- You facilitate all planning for the annual fund, future cultivation, communication, publications
- You determine annual \$ and donor goals with team and President/Principal
- You organize, coordinate and plan the constituent relations programs
- You organize and implement the Parent Giving Program
- You maintain donor relations with a primary focus on \$1,000+ annual donors

The Director of Advancement's Role

- You are the liaison with Board of Directors and Advancement Committee
- You organize and plan President Advisory Council events
- You maintain Office Policy and Procedures
- You assist in coordination of larger events
- You manage the planned giving program
- You supervise endowment development and reporting
- You maintain open lines of communication with President/Principal

Questions to Answer

Directors of Advancement – If you could list 5 things you wish your President/Principal would do or know to help make you ore successful in your job, what would they be?

Principals – If you could list 5 things you wish your Director of Advancement would do or know to help make you ore successful in your job, what would they be?

WHAT THE PRESIDENT/PRINCIPAL SHOULD EXPECT FROM THE ADVANCEMENT TEAM

1. Be Loyal
2. Be Honest
3. Share My Enthusiasm
4. Push me
5. Don't Waste My Time
6. Support Me
7. Manage Your Resources Well
8. Raise Money
9. Plan
10. Keep Your Eye on the Ball

WHAT THE ADVANCEMENT TEAM SHOULD EXPECT FROM THE PRESIDENT/PRINCIPAL:

1. Vision and Leadership
2. Commitment to the School
3. Commitment to Advancement
4. Integrity and Honesty
5. Perseverance and Patience
6. Optimism
7. Communication Skills

WHAT THE ADVANCEMENT TEAM SHOULD EXPECT FROM THE PRESIDENT/PRINCIPAL:

8. Energy and Pacing
9. Openness to Advice
10. Sense of Humor
11. Creativity
12. Comfort with Major Gift Solicitations
13. A Seat at the Table
14. Administrative and Managerial Ability

A Culture of Philanthropy

- Everyone understands the need to raise money and is willing to do what is necessary to support the effort, regardless of their role in the organization.
- Everyone behaves as the organization's ambassador- helping to identify new friends and partnerships whenever possible.
- Everyone can articulate a case for giving and how a gift will be used.
- Organizational processes are donor-centric - they are set up for the ease and comfort of donors, not staff.
- Visitors are welcomed in to the school and classrooms; dialogue is encouraged

A Culture of Philanthropy

- The front desk personnel are welcoming – and have received adequate training to handle all inquires about involvement in the organization.
- Everyone can answer basic questions about the finances of the organization.
- The President sees him/herself as the “face of the agency”
- The President is 100% committed and personally involved in fund raising.
- Students and families are viewed as experts in how the organization carries out its mission and are invited to share their stories whenever possible.
- The President, Board of Directors (and others directly involved in soliciting contributions) make a financial contribution at least annually.

Growing in Your Fundraiser Role

- Learn from effective fundraisers
- Preparation is the key to success
- Be a great listener and build relationships
- Your passion will motivate donors to give
- Donors give to people, not to programs
- Have fun – this is the best job in the world!

Listening

The most basic and powerful way to connect to another person is to listen. Just listen. Perhaps the most important thing we ever give each other is our attention.

Rachel Naomi Remen

Any final questions?

Larry Furey: lfurey@partnersinmission.com