

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
- Advancement Plan
- Database 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

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

- Vision
- Message
- Audience
- Content
- Design
- Distribution
- Frequency

Volunteer Management and Governance "INVOLVING"

Board Committees

- Mission Integration
 - Catholic Identity
 - Service & Outreach
- Finance
 - Budget
 - Investment
- Advancement
 - Communications
 - Enrollment Management
 - Special Events
 - Annual Fund
 - Major Gifts

Volunteer Groups

- Parents Association
- Alumni Association
- Parents of Alumni Association
- Booster Clubs

Strategic Planning "VISIONING"

- Institutional
- Advancement
- Curriculum
- Campus Master
- Financial

Research "IDENTIFYING"

- Database Review
- Rating and Screening
- Electronic Research
- Individual Research

"Information is Power"

Stewardship "THANKING"

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

"7 Ways to Thank a Donor"

Model over Membership

The Five I's of Advancement

- Identification
- Information
- Interest
- Involvement
- Investment



Revenue

Enrollment Management

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

Enrollment Management Funnel

Branding = Identity

General Marketing = Attention

Target Marketing = Attraction

Micro Marketing = Relationship

Recruitment = Interest

Application = Action

Acceptance = Invitation

Enrollment = Decision

Retention = Fulfillment

Graduation = Celebration

"A Lifetime Relationship"

Special Events

Types

- Auctions
- Golf Tournaments
- Legacy Galas

Four Criteria

- Build Community
- Raise Money
- Celebrate Mission/Vision
- Cultivate Prospects

"Special Events Have A Life"

Annual Fund

"The Trunk of the Tree"

Five Methods

- Personal Solicitation
- Direct Mail
- Phone
- E-Solicitation
- Text

Five Types of Gifts

- Renewal
- Recapture
- Increase
- Invite
- Transition

"Commitments Not Pledges"

"Major Gifts are a Contact Sport"

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 endorsed by the Board on an annual basis.

Seven R's of a Solicitation

- Research
- Rehearse
- Remember
- Relax
- Recall
- Recommend
- 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

PROSPECT FUNNEL

Identification
Research
Assignment
Cultivation
Solicitation
Stewardship

} = Success





Planned Giving

INITIAL STEPS

- Planned Giving Advisory Committee
- Planned Giving Policies
- Planned Giving Recognition Society
- Identify "Loyals"

Types of Planned Gifts

- Bequests
- Charitable Trusts
- IRA's
- Insurance
- Annuities
- Deferred Gifts

OUR STRATEGIC PARTNERS

