

#### Centralized Asset Fund The Creation of a





## Centralized Asset Fund Objective

long-standing Black institutions that have The creation of a central Fund to support been in existence for 50+ years.



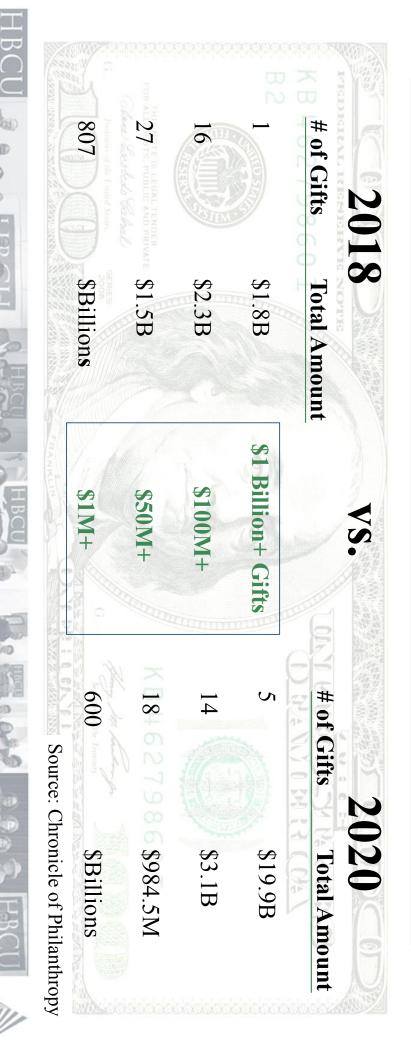
# Centralized Asset Fund Primary Advantages

- **Central Repository of Institutional Assets/Needs** Central repository of case statements and needs institutional strengths, strategic plans, assets (research, faculty, programs),
- 2) Collaborative Opportunities Institutions can collaborate on core shared priorities to strengthen impact.
- <u>w</u> **Comprehensive Philanthropic Resource for Donors** – Donors can be directed to one platform to learn about priorities and initiatives across institutions
- Leverages Philanthropy for additional revenue





## Philanthropic Gifts of \$1M+



## Collective Aspirations HBCUs

country and the world transformative for, and positively impact HBCUs, the Black community, the **Collective Aspirations/Common Agenda** – Shared big ideas that can be

- Immediate and long-term needs and priorities for individual institutions
- revenue Projects and initiatives that will produce sizable, scalable and sustainable
- collectively together Shared projects and initiatives that multiple organizations can work towards



# CAF Requirements: Collective Impact

Backbone Support	<b>Continuous</b> <b>Communication</b>	Mutually Reinforcing Activities	Shared Measurement	Common Agenda
<ul> <li>Separate organization(s) with staff</li> <li>Resources and skills to convene and coordinate participating organizations</li> </ul>	<ul> <li>Consistent and open communication</li> <li>Focus on building trust</li> </ul>	<ul> <li>Differentiated approaches</li> <li>Coordination through joint plan of action</li> </ul>	<ul> <li>Collecting data and measuring results</li> <li>Focus on performance management</li> <li>Shared accountability</li> </ul>	<ul> <li>Common understanding of the problem</li> <li>Shared vision for change</li> </ul>

#### Data Collection

### Types of Information Needed

- 1. Institutional Data Sets to Collect:
- a. Strategic Plans
- b. Cases for Support (with financial fundraising goals)
- c. Institutional Budgets (revenues and expenditures)
- a Funding Sources – Tuition and Fees, Government Support, Private Philanthropy, Endowments, Auxiliary Revenue
- 0 scholars, Top research initiatives, Government & Corporate partnerships From HBCUs – Top schools/colleges on campus, Top programs/departments, Top faculty
- From HBIs Mission, Key organizational functions, Signature programs impacting the Black community, Top staff and their work, Research focuses
- 2. Institutional Needs Assessments for Top Programs



#### CAF Matrix

Objective	Goal/Requirements	Considerations
Research, Data, Collaboration and Strategic Planning	<ol> <li>Collect institutional data</li> <li>Coalesce and synthesize data</li> <li>Determine synergies and potential collaborations</li> <li>Develop comprehensive plans</li> </ol>	
Collective Fundraising Goals (Examples)	<ul> <li>Cum Laude+ Scholarships</li> <li>Cutting Edge Research and Degrees of the Future</li> <li>Faculty Funding</li> <li>Capital Improvements</li> <li>Investments in Revenue Producing Projects</li> </ul>	
Impact/Evaluation Metrics	Shared impact and evaluation metrics that all universities/colleges agree to	<ul> <li>-Were we able to collectively accomplish the shared vision/goals? Did we receive the funding?</li> <li>-Hold donors accountable through shared information/data/giving histories</li> </ul>
Collective Fundraising	Advancing donor centric strategies for funding	
Centralized Donor Stewardship and Recognition Levels	Tier 1\$1B+Tier 2\$100M - \$999MTier 3\$10M - \$99MTier 4\$1M- \$9.99MTier 5\$500K- \$999.9KTier 6\$100K - \$499KTier 7\$25K- \$99K	

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Internal Planning. Gift Duramid for a \$10R Goal

Gift Amount	# of Gifts Needed	Average per institution (100)	<b>Total Amount Needed</b>
\$1B	S	NA	\$5B
\$100M	30	NA	\$3B
\$10M	100	1	\$1B
\$1M	250	2.5	\$250M
\$500K	500	S	\$250M
\$100K	2,500	25	\$250M
\$25K	5,000	50	\$250M
	3,630	36	\$10B

### \$100M Goal per Institution

#### Based on 100 Institutions

Manager	Gift Range	# of Gifts per Institution	# of Prospects
President's Portfolio	\$10,000,000+	1	10
Chief Development Officer/ Vice President	\$500,000-\$1M+	7.5	40
Major Gifts Officers	\$100,000 & \$250,000	25	100
Annual Fund Officers	\$25,000	50	200



### Uniform Stewardship

# **Uniform Donor Recognition and Benefit Structure – Benefits:**

- **Inspiration** for donors make larger gifts and provide perspective on where they stand in relation to other donors across the country.
- shared stewardship strategies **Donor centric model**, as donors across institutions can connect through
- Standardization of development best practices that a central structure can

help manage. Examples: A. Multi-year gifts

- B. Planned giving
- C. Donor Advised Funds



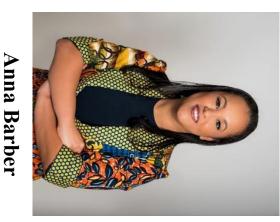
#### Stewardship

### Using Recognition and Benefit Levels

Benefit Opportunities Conference of Philanthropist	* * * * SMH	* * *	* *	* * SOOK	\$250K	\$250K \$100K \$50K	\$50K
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	*	*	*	*			
	*	*	*	*	*		
	*	*	*	*	*	*	
	*	*	*	*	*	*	*

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clients, inclusive of institutions of higher education, K-12 education, social justice strategy and grant writing services. The firm has represented a broad array of specializing in campaign planning, fundraising strategy, individual giving Barber & Associates, LLC is a boutique fundraising consulting firm and public service organizations, and museums.

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President



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