



# The Creation of a Centralized Asset Fund



# Centralized Asset Fund Objective

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



# Centralized Asset Fund *Primary Advantages*

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



# The Possibilities

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# Philanthropic Gifts of \$1M+

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2018		VS.		2020	
# of Gifts	Total Amount			# of Gifts	Total Amount
1	\$1.8B	\$1 Billion+ Gifts		5	\$19.9B
16	\$2.3B			14	\$3.1B
27	\$1.5B			18	\$984.5M
807	\$Billions	\$1M+		600	\$Billions

Source: Chronicle of Philanthropy



# Collective Aspirations HBCUs

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

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



# CAF Requirements: Collective Impact

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## Common Agenda

- ✓ Common understanding of the problem
- ✓ Shared vision for change

## Shared Measurement

- ✓ Collecting data and measuring results
- ✓ Focus on performance management
- ✓ Shared accountability

## Mutually Reinforcing Activities

- ✓ Differentiated approaches
- ✓ Coordination through joint plan of action

## Continuous Communication

- ✓ Consistent and open communication
- ✓ Focus on building trust

## Backbone Support

- ✓ Separate organization(s) with staff
- ✓ Resources and skills to convene and coordinate participating organizations

# Data Collection

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## 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)
  - d. Funding Sources – Tuition and Fees, Government Support, Private Philanthropy, Endowments, Auxiliary Revenue
  - e. From HBCUs – Top schools/colleges on campus, Top programs/departments, Top faculty scholars, Top research initiatives, Government & Corporate partnerships
  - f. 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	1) Collect institutional data 2) Coalesce and synthesize data 3) Determine synergies and potential collaborations 4) Develop comprehensive plans	
Collective Fundraising Goals (Examples)	- Cum Laude+ Scholarships - Cutting Edge Research and Degrees of the Future - Faculty Funding - Capital Improvements - Investments in Revenue Producing Projects	
Impact/Evaluation Metrics	Shared impact and evaluation metrics that all universities/colleges agree to	-Were we able to collectively accomplish the shared vision/goals? Did we receive the funding? -Hold donors accountable through shared information/data/giving histories
Collective Fundraising	Advancing donor centric strategies for funding	
Centralized Donor Stewardship and Recognition Levels	Tier 1 \$1B+ Tier 2 \$100M - \$999M Tier 3 \$10M - \$99M Tier 4 \$1M- \$9.99M Tier 5 \$500K- \$999.9K Tier 6 \$100K - \$499K Tier 7 \$25K- \$99K	

# CAF Fundraising

## Internal Planning: Gift Pyramid for a \$10B Goal

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

\*All gifts can be made over a 5-year pledge cycle. Gifts of \$100M+ can be paid over 10 years.

# \$100M Goal per Institution

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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



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# Uniform Stewardship

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## Uniform Donor Recognition and Benefit Structure – Benefits:

- 1. Inspiration** for donors make larger gifts and provide perspective on where they stand in relation to other donors across the country.
- 2. Donor centric model**, as donors across institutions can connect through shared stewardship strategies.
- 3. 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	\$10M+	\$5M	\$1M	\$500K	\$250K	\$100K	\$50K
Conference of Philanthropist	*						
	*	*					
	*	*	*				
	*	*	*	*			
	*	*	*	*	*		
	*	*	*	*	*	*	*
	*	*	*	*	*	*	*



## Presented by:

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

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# THANK YOU!



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