

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.



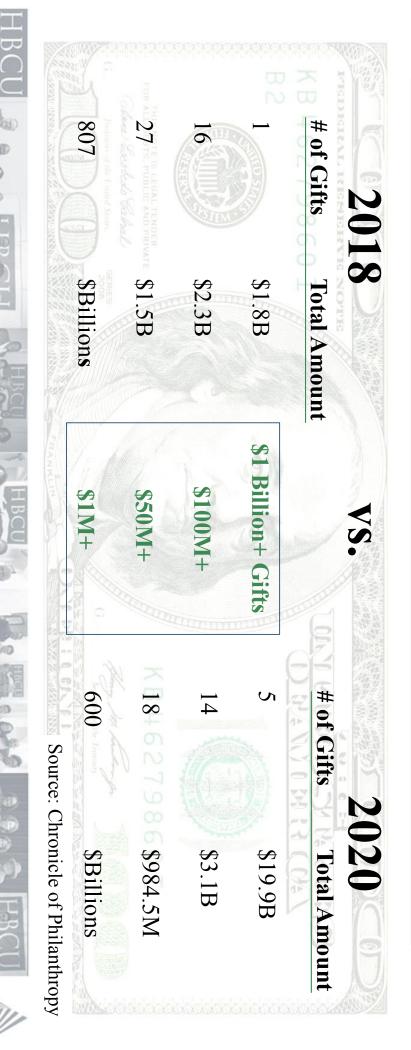
Centralized Asset Fund Primary Advantages

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

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	 Collect institutional data Coalesce and synthesize data Determine synergies and potential collaborations 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 - \$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)	Total Amount Needed
\$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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