

- From an "outsider's perspective" I saw points of **major consensus**. They aren't visible when talking about 'pulling the trigger on a building' but they are visible when talking about the real issue - **advancing the vision of the school**.
 - The Vision!
 - [MESSAGE POINT REDACTED]
 - [MESSAGE POINT REDACTED]
 - Our financial model and **ORDER** of goals (I think this is also our 'strategy on a napkin')
 - Stability
 - Sustainability
 - Then, conservative growth (ie building)
 - The **ORDER** of our priorities
 1. Students (Keeping tuition affordable, providing enough tuition assistance)
 2. Teachers (We made cuts this year - would like to restore things like teacher training)
 3. Campus

- **Advancement is:**
 - Sharing the entire vision and model.
 - Driven (on the funding side) by 1:1 dialogues
 - All about relationships. Always about building and maximizing. Note: I would be doing as many visits to the school as possible.

- **Reminder... THINK BIG!** Just another 'outsider's perspective'. We're VERY focused on \$100K / near term needs. Look at the **TOTAL VISION** as it looks over next 3-5 years...
 - \$100K annually for tuition assistance
 - \$50K for teachers
 - \$2M (LEGACY) that will seed an endowment
 - \$6M (give or take) to fund phase I of building

This is a \$8.5M vision (approx).

- **Right now... today...**
 - [SCHOOL] has funding needs.
 - [SCHOOL] has people that LOVE the mission. That are moving from success to significance. That would step up and support the VISION... if ASKED.
 - Doesn't matter if it's a \$2.5M Vision (only students and teachers - cash and endowment) or \$7.5M (including the building)

- **Issue is about:**
 - MESSAGE (Vision --> Funding Model/Plan/Philosophy --> Funding Priorities)
 - FUNDING MODEL (Today/Tomorrow/Forever)
 - RELATIONSHIPS (w/ parents, w/ prospects --> need to communicate the vision)

- **Q.** "How do we talk about something like the building if we don't have final numbers or consensus?"

A. We can do a lot of work around messaging but simply put... It's not about 'fundraising'. Not today and not in two years. It's about relationships. It's about **LEADERSHIP CONSENSUS BUILDING**. Regardless of the number needed you need to get the consensus/buy-in/support of 10-15 families, members of the 'Christian community', etc. Right now it's more about sitting with these people to **SHARE THE VISION**. "The ask" right now is not about \$150K or \$3M. It's about support for the vision. It's about asking, "As we work through this vision can we talk to you about being a major part/piece/supporter/leader to make this happen?"

Special note: I've taken this approach 70% of the time. Put yourself in the funders shoes... instead of saying, "We did all this planning, will you fund it?" (A TRANSACTION) You're focusing on partnership (RELATIONSHIP). You're saying, "We hope you can help make this vision a reality and we want to start talking to you about plan as it's taking shape." INVOLVEMENT BEGETS INVESTMENT!

I think your message allows you to 'close' today with support that matches your priorities. Could 'close' at \$50K gift while predisposing for a \$1M transformational gift.

- **The Action Plan:** The action plan is THE EXACT SAME whether you are ready to put numbers to the building tomorrow or in one year... because it's about relationships and vision.
 - A need to be focusing on top prospects
 - A need to be engaging around the vision (tours, dialogue, etc)
 - A need to be asking
 - "Will you help with tuition assistance?"
 - "Could we talk about legacy commitment?"
 - "Can we begin to talk to you about being a part of the total vision?"
- I also wanted to pass along the 'three double questions of every investor'
 - "WHERE is the money going? And WHY?"
 - "WHO decided that? And HOW?"
 - "WHAT do you want from me? And WHEN?"

*Thinking about those as a framework should shed a lot of light on the message for [SCHOOL].

- **Closing thoughts:** You have a very LOGICAL case/story. I think it's logical when presented as a total picture and breaks down entirely when presented in pieces - this is where I saw a lot of confusion. It's not logical to talk about a building (even think about a building) when we just raised tuition. Also not logical to just talk about an immediate need in the tuition when people will wonder, "What's the board up to with that property?"

More than logical, it's COMPELLING! I want to tell you that as an outsider. I feel VERY STRONGLY ABOUT THIS. Bring a qualified prospect through the school. Let them SEE what [SCHOOLS UNIQUE METHOD OF] education is. Talk to them about WHERE we're going... the VISION. Don't talk about 'annual fund' or 'capital campaign' - these are internal siloed messages. Talk to them about the STUDENTS -- as one woman said, "I think of these as 'God's Navy Seals!'" Talk to them about the teachers and talk to them about how this is a place that's CHANGING LIVES. A homerun... every time.