

A Checklist

Managing Revenue Centers in the Final 100 Days of the School Year

Through Enrollment and Development, the two revenue centers of the Healey Advancement Methodology, the school achieves a sustainable source of income via tuition and mission-based fundraising. In the final 100 days of the school year:

TACTICS FOR ENROLLMENT: FILLING THOSE LAST FEW SEATS

- Track and analyze retention data to determine reasons for missed deadlines and plan appropriate follow-up, including intervention on issues related to financing.
- Determine remaining openings in all grades and establish recruitment priorities and targeted tactics.
- Follow-up on existing inquiries with opportunities to educate prospects via tours, shadowing experiences and events.
- Market the school via family-friendly, kid-friendly locations and events in the community, including preschools and daycare centers without Kindergarten programs.
- Conduct targeted mailings intended for parents who may be looking for alternatives over the summer.
- Plan summer retention and recruitment initiatives such as Facebook updates and Back-to-School Bingo to stay in touch with current families and events such as Transfer Information Night, Prospective Parents Information Night and Early Education Night.

TACTICS FOR DEVELOPMENT: THE FINAL DRIVE TO MEET OR EXCEED GOAL

- Conduct the final solicitation, typically in early May. This could take the form of a reminder postcard or a more elaborate mailing, such as an annual report proof designed to inspire interest in moving to a higher giving category.
- Plan targeted outreach, by phone or direct mail, to LYBUNTS (donors who gave “Last Year But Unfortunately Not This [Year]”) and eventually SYBUNTS (donors who gave “Some Year But Unfortunately Not This [Year],” and not last year). This is a typical step in forming a “habit of giving” to annual funds, as outlined by the Council for Advancement and Support of Education (www.case.org).
- Host an additional Lead Gift Event to capture larger gifts from major donors at the top of the pyramid.
- Achieve 100% participation among board members, faculty and other key influencer groups.
- Hold a “thank-a-thon,” staffed by eighth graders or high school students calling to thank donors.
- Build and update alumni and donor databases—especially critical for schools that will be launching an Annual Fund the following school year.

The results-oriented, business-minded school remains diligent and acts with urgency through the end of the school year to ensure that its finances are in order and goals are met.