

ADVANCEMENT AS A STRATEGIC GROWTH DRIVER

REORGANIZING REVENUE IN INDEPENDENT SCHOOLS

findthroughline.com

A presentation for



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Session Overview

Understand school-wide revenue

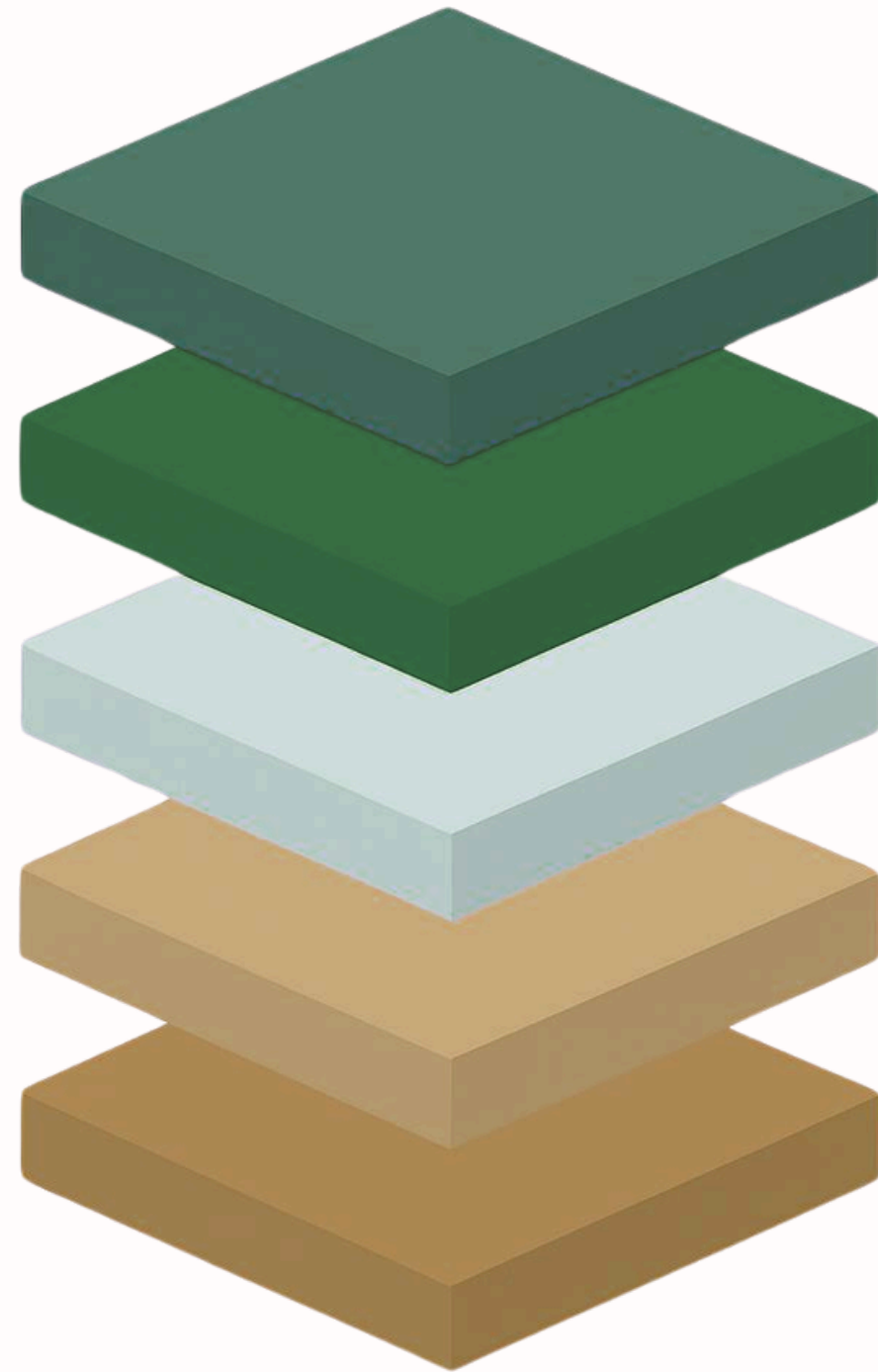
Unpack the modern advancement system

Align advancement with other school functions

Connect relationships and revenue



Pressures on the Business Model



Enrollment volatility



Financial aid pressure



Advancement talent shortages



Operational inconsistencies



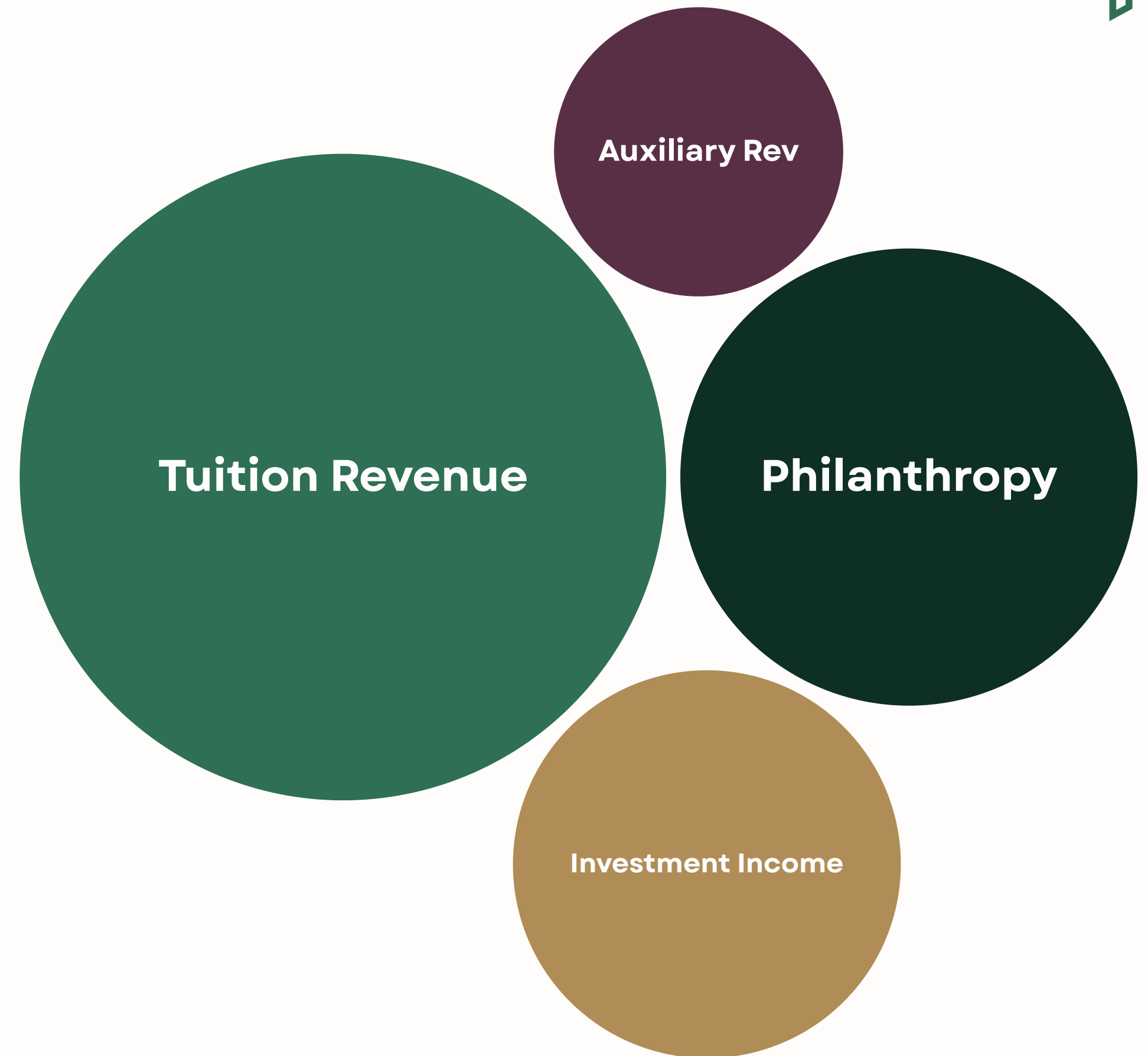
Board-level revenue scrutiny



Reframing Advancement in the Revenue Model

Senior leaders must understand
which revenue streams are:

- Enrollment-driven
- Market-driven
- Program-driven
- Relationship-driven





Advancement Reality Check

**Limited
staff resources**

**Multiple roles &
responsibilities**

**High
expectations**

**Complex
donor relationships**



Advancement Isn't a Department. It's a System.

- Converts institutional strength into philanthropic investment
- Requires significant trust and autonomy
- Distributed management





Where Advancement Dollars Tend to Sit

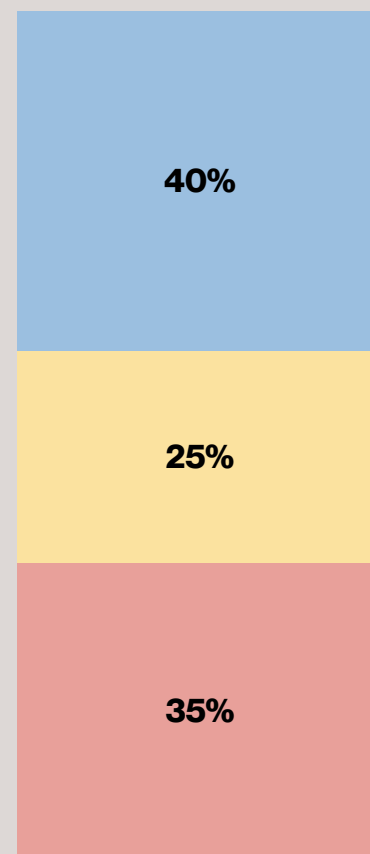
● Infrastructure & Advancement Services

● Community Engagement & Annual Giving

● Frontline Revenue Leadership

Large School (800+)

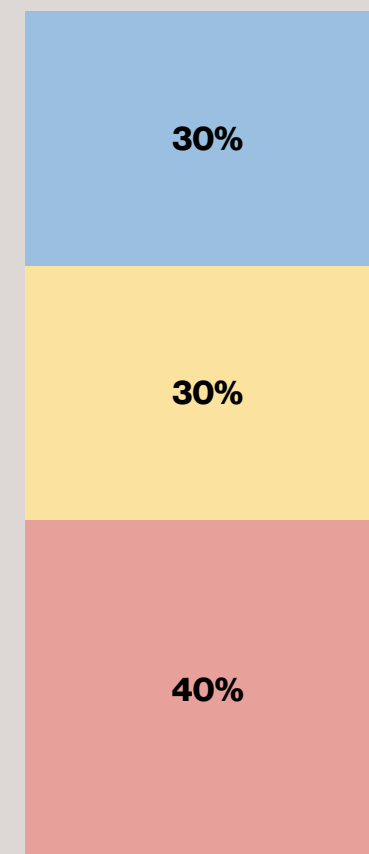
6+ FTE



Insight: Infrastructure capacity often equals frontline capacity.

Mid-Size School (400-800)

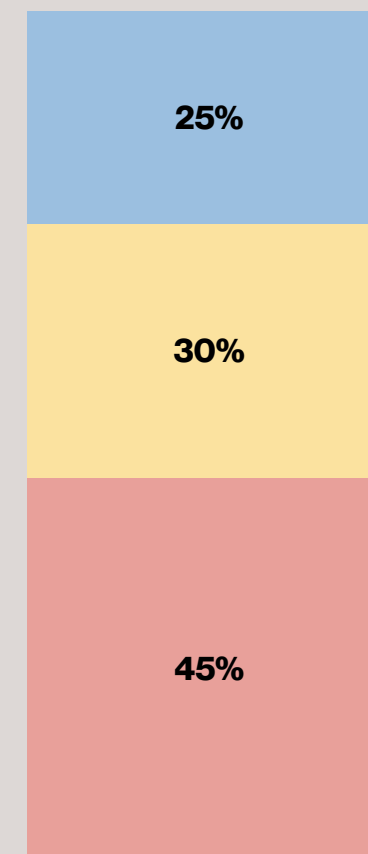
4-5 FTE



Insight: Specialization is limited; roles blend across functions.

Small School (<400)

1-3 FTE



Insight: All core functions are compressed into one or two people.



Analyzing Your Advancement Model

Understand Total Advancement Cost

- Fully loaded payroll (salary + benefits + taxes)
- Technology stack and platform costs
- Turnover, search, and onboarding expense
- External/vendor spend

Understand Cost Allocation

- % of budget tied to frontline revenue roles
- % of budget tied to operational infrastructure
- % of budget tied to engagement vs. cultivation
- Whether your allocations are intentional

Measure Revenue Productivity

Leading Indicators

- Monthly donor interactions
- Number of solicitations
- Campaign calendar adherence
- Data accuracy / reporting reliability

Lagging Indicators

- Donor retention rate
- Average gift growth
- Net revenue growth
- Cost per dollar raised (trendline, not snapshot)



Leadership Signals a School's Priorities

- What the Head of School prioritizes **becomes fundable**
- Board behavior **signals seriousness** (or lack of it)
- Donors easily sense **leadership alignment**





Advancement & Academic Programs

- Weak or unclear programs are **difficult to fund**
- Compelling and differentiated programs are **easier to fund**
- Advancement **reflects programs;** it doesn't fix them





Advancement & Enrollment

- Current families are your most **reliable, repeatable donor base**
- Misalignment with current families **weakens annual giving**
- Retention efforts are directly tied to **philanthropic success**





Advancement & Communications

- Marketing doesn't help advancement, but **making meaning does**
- Communicating more is not the same as **connecting more**
- Ask yourself if your school's comms are **clear, joyful, and actionable**





Key Questions for 2026-27

If advancement is working well:

How can your program be clearer, more joyful, and more actionable?

How can you improve your relationships with other school functions?

How can you educate yourself about the financial implications of advancement?

If advancement is not working well:

How can you urgently involve your Head of School and Board of Trustees?

How can you review your advancement model and cost structure to identify your most pressing concern?

How can you distribute some management responsibilities to trusted leaders?



DISCUSSION AND Q&A



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THANK YOU FOR JOINING

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