

Advancing Advancement within Your Institution

(Fund Raising, Alumni Relations,
Communications, and Marketing)

CASE Europe Annual Conference
AUGUST 31, 2005

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COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION



Advancing Advancement

- Introduction
- The Issue
- The Causes
- The Solutions
- The Case
- Questions & Observations

What Is Advancement?

Advancement is the set of functions at an educational institution dedicated to the strategic management of long-term relationships with key constituencies, including:

- benefactors
- alumni
- opinion leaders
- decision makers
- current and prospective students
- faculty and staff

What Is Advancement?

The advancement functions include:

- Alumni Relations
- Communications
- Marketing
- Fund Raising

And may also include:

- Advancement Services
- Advancement Management
- Government Affairs
- Community Relations
- Special Events

What Unifies Advancement?

All of the advancement disciplines are united by:

- the common goal of ensuring the long-range success of the institution in fulfilling its mission, and
- the common strategy of building supportive relationships among those constituents who can make significant contributions to that long-range success.

Building Supportive Relationships

- Focus on institutional mission, goals
- Segment constituencies
- Conduct research
- Set attitudinal/behavioral objectives
- Develop plan
- Align resources
- Engage stakeholders
- Implement tactics
- Evaluate results

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The Issue

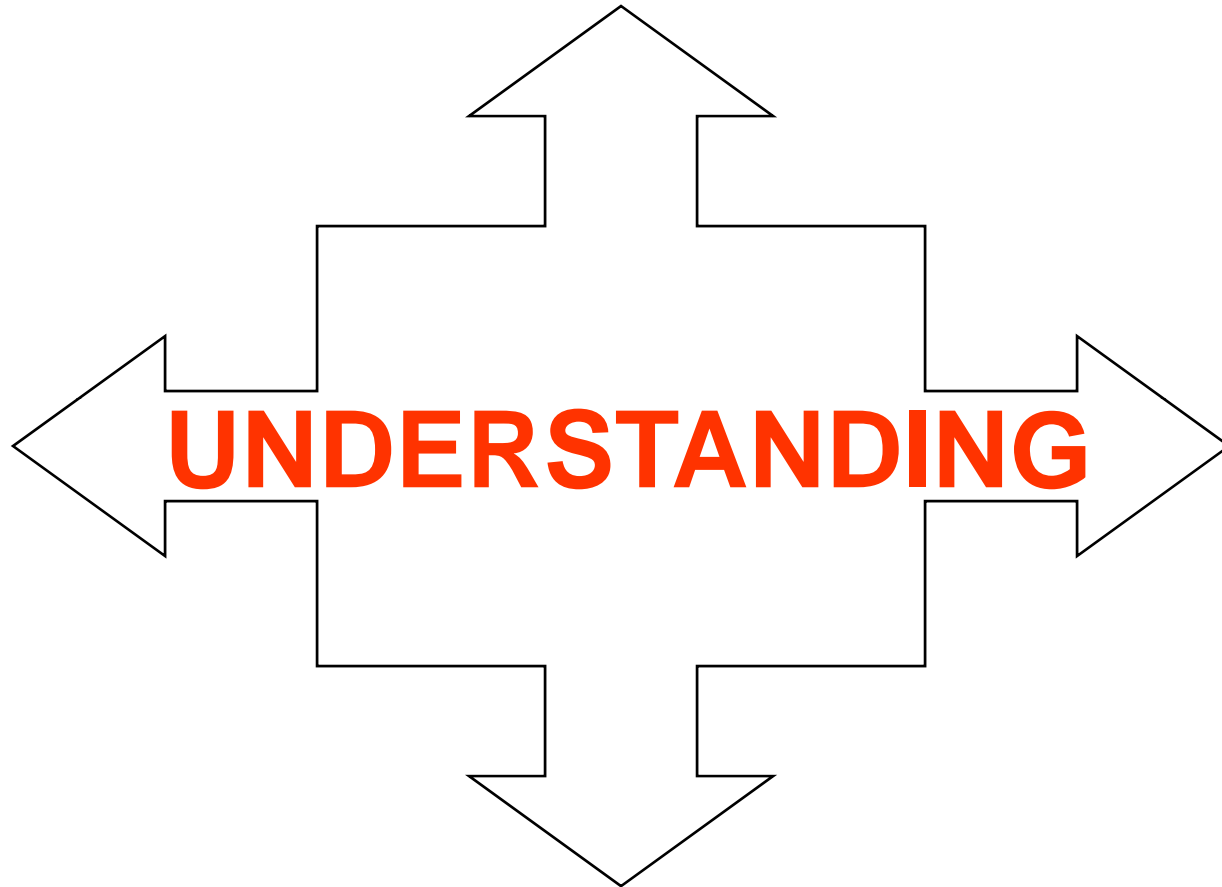
INCLUSIVENESS

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INVESTMENT

COOPERATION

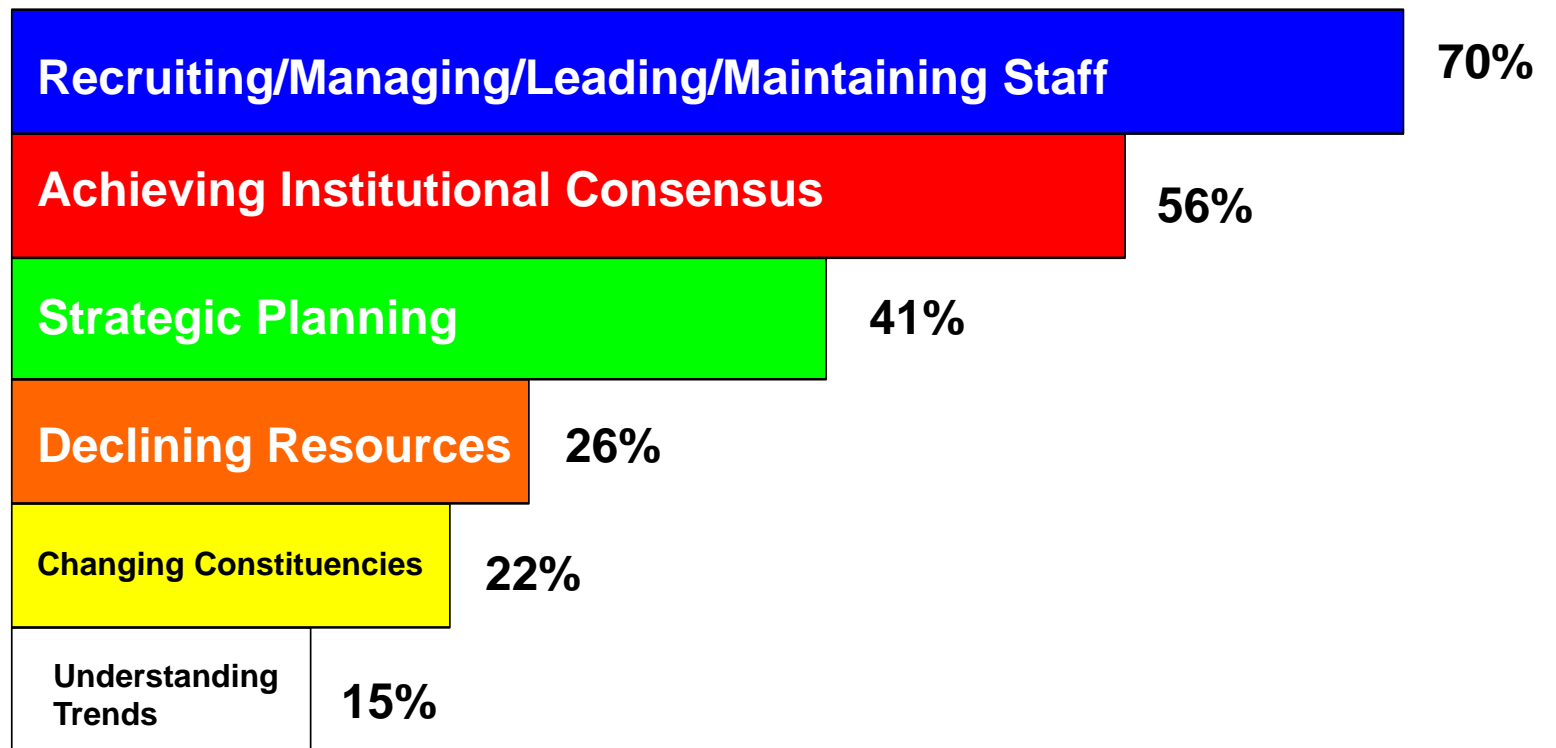


COLLABORATION

INCLUSION

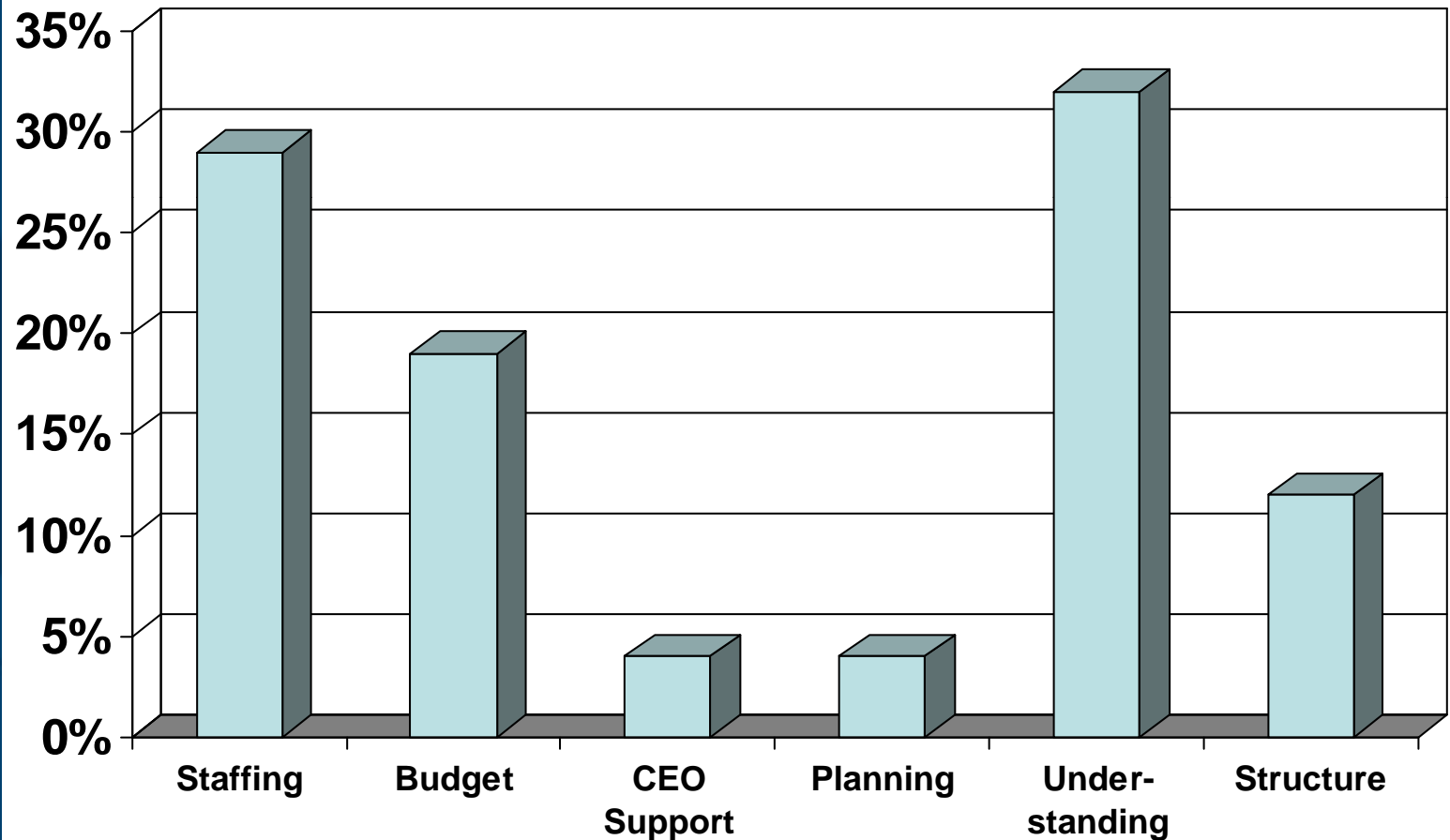
Top Challenges

Participants in Chief Advancement Officer Summit 2005



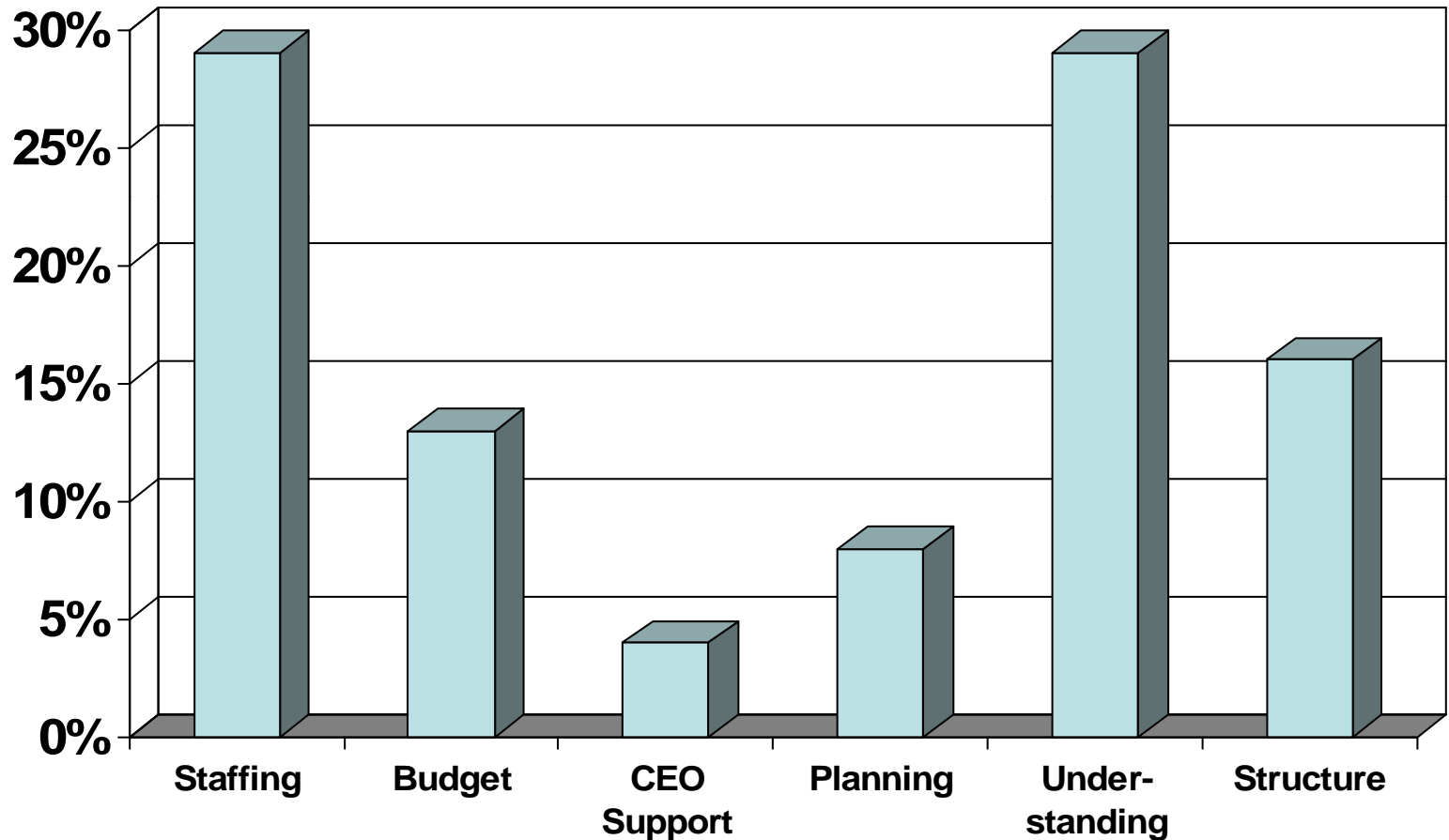
Obstacles to Effectiveness

Participants in CASE Summer Institutes 2002-2004



Obstacles to Effectiveness

Participants in 2005 CASE Europe Annual Conference





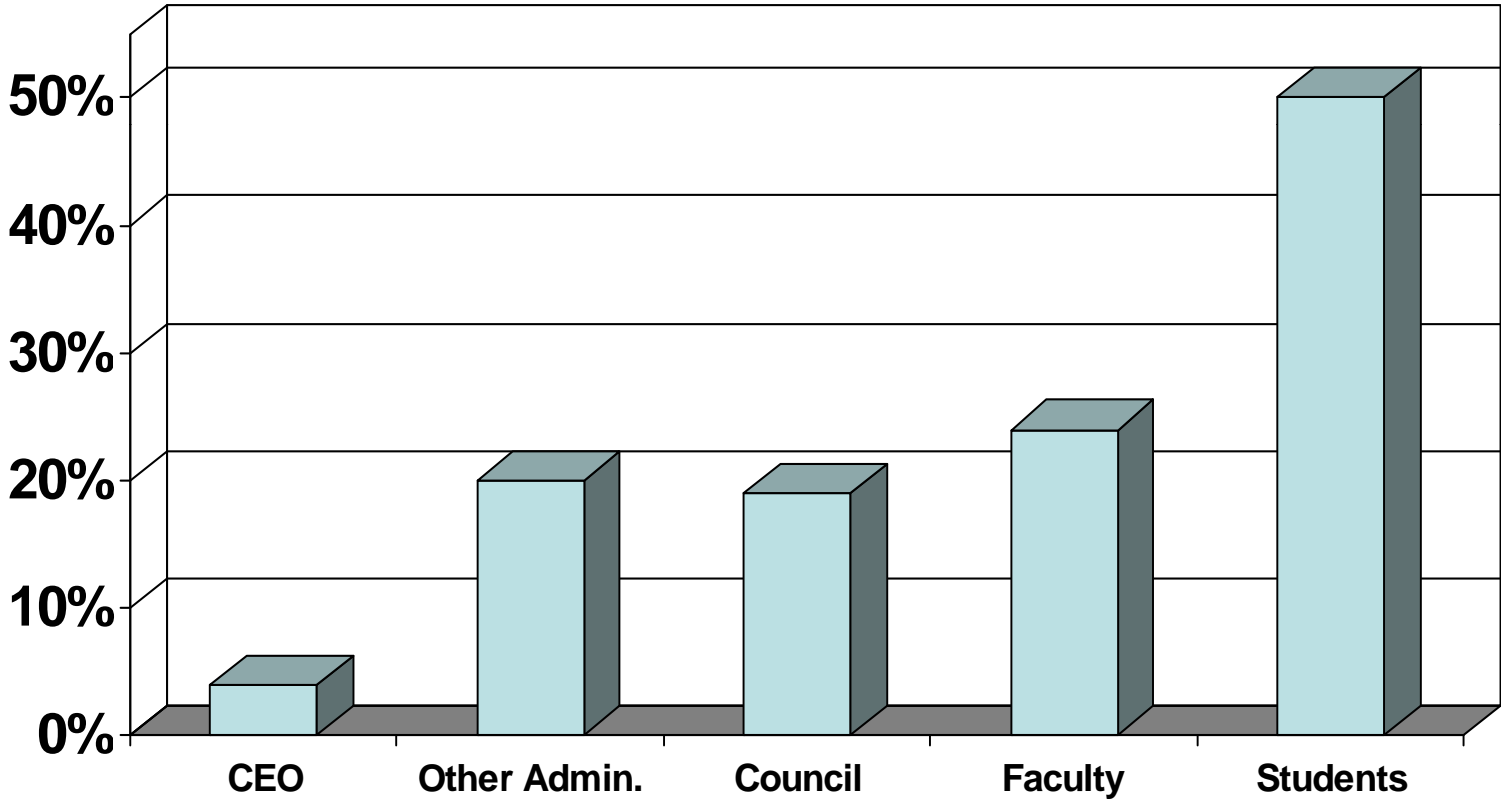
“There was a consistent understanding across the campus [at Canadian universities] that [advancement] was an indispensable tool and central to university planning. As a sector we have much to do before we can make that vision as widespread in our own institutions.”

Times Higher Education Supplement 26 Aug 2005
Jon Baldwin, registrar, Warwick University
following CASE/Leadership Foundation tour

Understanding by Constituency

Participants in 2005 CASE Europe Annual Conference

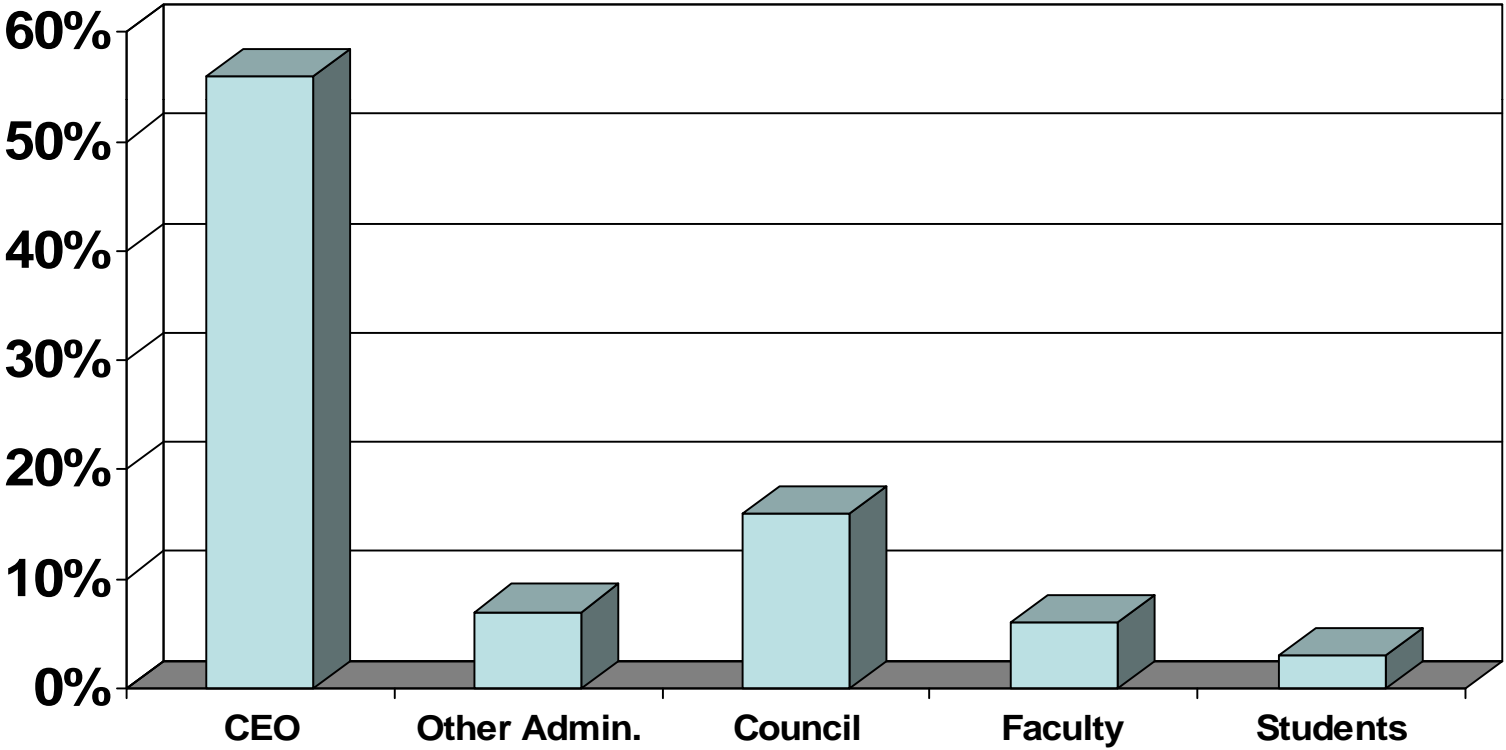
Does Not Understand Our Work At All



Understanding by Constituency

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Understands Our Work Well



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The Causes

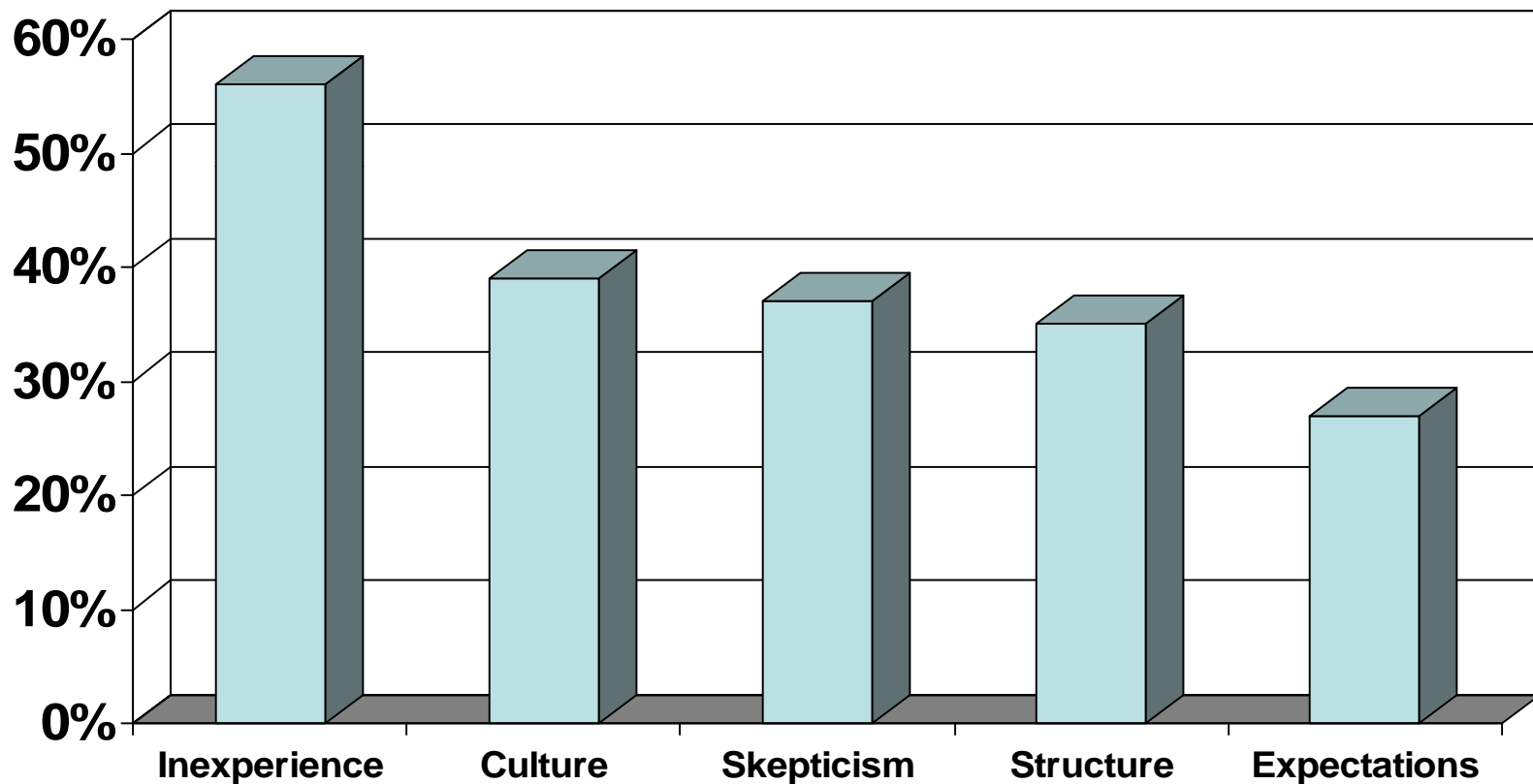
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Top Five Contributing Factors

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Primary Reasons for Lack of Understanding



Other Factors

- From “their side”:
 - Lack of Engagement
 - Narrow Focus
 - Competition for Resources
- From “our side”:
 - Insufficient Reporting of Results
 - “Shoemaker’s Children” Syndrome

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The Solutions

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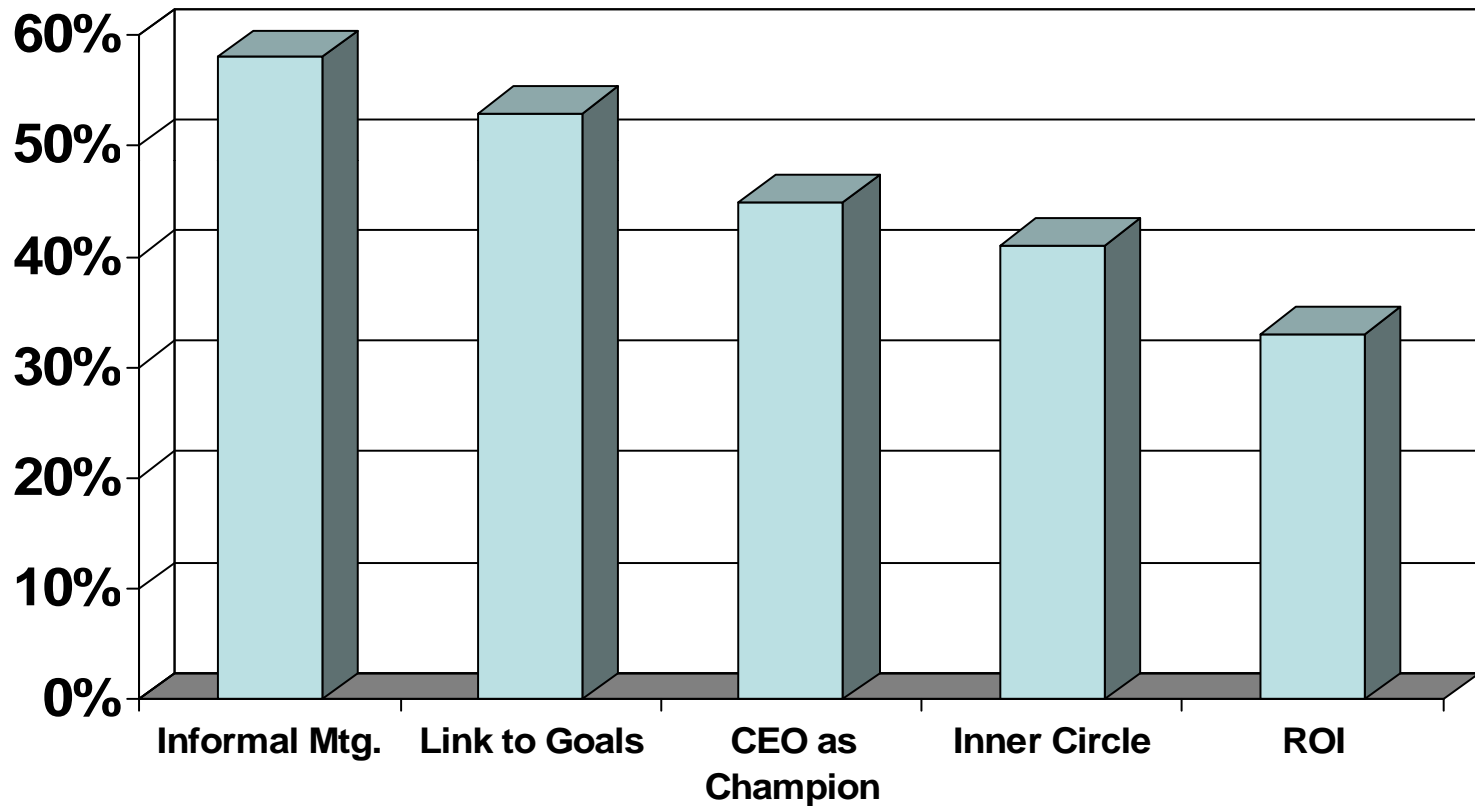
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Top Five Solutions

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Very Effective at Increasing Understanding



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Other Solutions

- Reports in internal publications
- Formal presentations
- Heightened awareness of external factors:
 - Market pressures
 - Government initiatives
 - Professional association efforts
- Visits to other institutions

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“The next two steps for UK advocates of advancement must be to persuade the Government to emulate the Canadian Government’s financial support for universities’ advancement programmes ... and to **build a broader consensus for advancement right across our institutions.** Today, those advocates of advancement can claim one small step: they have persuaded one university registrar of the importance of their work.”

Jon Baldwin, registrar, Warwick University

CASE Studies

Rochester Institute of Technology

- Appointed AR Task Force (academics, trustees, alumni board, support staff) to assess AR activities, resources, organization, efficiency.
- Resulted in 7 new positions in FY06 with 12 more to be added over two years.

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CASE Studies

Texas Christian University

- Marketing Advisory Board (cross-institutional reps, trustees, volunteers) meets 3-4/yr. to review issues and make recommendations.
- Helps get everyone on the same page with regard to institutional message and positioning.

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University of Louisville

- Linked integrated marketing campaign objectives to institutional goals, set intermediate targets, and communicated them widely.
- Secured resources for annual survey of prospective students, gained institutional confidence, delivered higher quality incoming classes.

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Australian National University

- Established systematic program to evaluate public relations activities and report results to the campus community.
- Increased credibility of the office by showing that it had increased the credibility of the university.

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McMaster University

- Created teams that integrate advancement efforts in support of specific offices (CEO, academic units).
- Synergies among alumni relations, development, and communications yielded greater impact and broader support across the university.

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Northwestern University

- Disseminates departmental mission statement that reflects university's mission; issues quarterly report to campus leadership; meets semi-annually with deans.
- Strengthened ties across organization, especially with academic leaders.

CASE Studies

Imperial College London

- Developed branding steering committee (included academic leadership) and a brand implementation group (included marketing-related offices); surveyed internal groups as part of research phase.
- Yielded increase in applications and buy-in from other offices.

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Other Solutions

- Deliver early wins
- Get out of Your Office
- Join Committees
- Give Others Roles to Play
- Share the Credit
- Establish Liaisons
- Review Office Structure
- Make the Case

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The Case for Advancement

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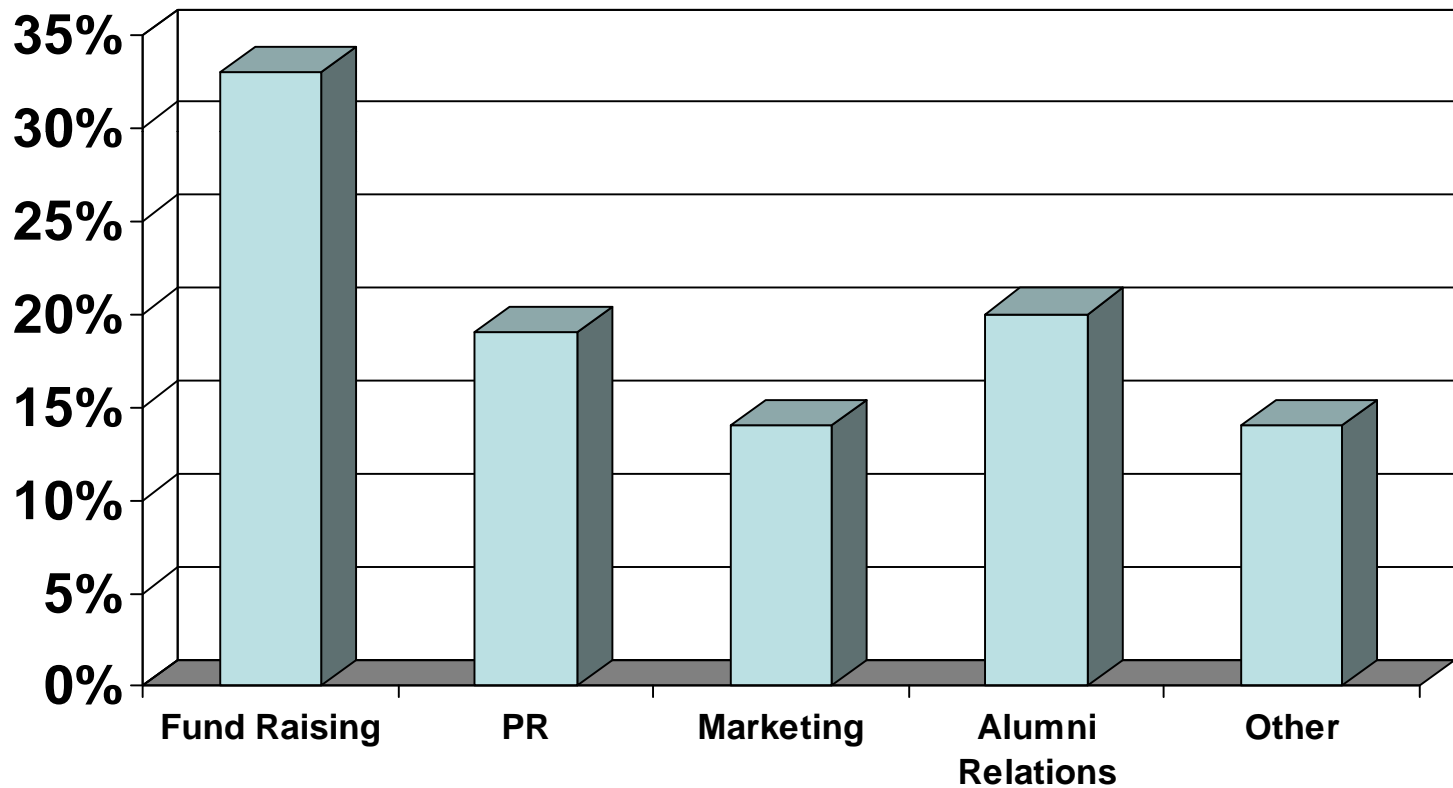
Together, the advancement functions add value to the institution by:

- Keeping the flame
 - Telling the story
 - Instilling pride
 - Scanning the environment
 - Enhancing the brand
 - Marshalling the resources
 - Delivering results
- ...in a professional manner
- ...in keeping with the institutional culture
- ...in support of the institutional mission

Areas of Responsibility

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I Spend Most of My Time On:



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The Case: Alumni Relations

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What Are the Roles of Alumni?

- Serve as institutional advocates.
- Provide feedback and counsel.
- Generate financial support.
- Participate in governance.
- Assist with student recruitment, both directly and indirectly.
- Serve as a resource and talent pool for faculty and staff.

What Is the Role of the Alumni Relations Office?

- Build life-long relationships with alumni in support of the institution.
- Facilitate two-way communication between the institution and alumni.
- Leverage a powerful alumni voice on behalf of the institution.
- Maintain history and traditions, and help secure a bright future for the institution.

How Can the Alumni Relations Office Help the CEO?

- Involve alumni as advocates for the CEO's vision and institutional goals.
- Advise the CEO on working with alumni during institutional changes and challenges.
- Guide the CEO in developing life-long relationships with alumni.
- Assist the CEO in creating a culture of collaboration and service.

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The Case: Communications and Marketing

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What Do the Terms Mean?

- **Communications** – the process of exchanging information with key constituencies, internal and external.
- **Marketing** – the strategic adaptation of price, product, placement, and promotion to the marketplace.
- **Integrated Marketing** – the coordination of marketing across the institution.
- **Public Relations** – the management of relationships with key constituencies, internal and external.

What Is Branding?

- Your institutional promise (made and kept) as perceived by a target audience.
 - A collective responsibility that is built daily in libraries, classrooms and laboratories.
- ❖
- A strong brand is developed and reinforced through a long-term, strategic process led by the CEO.
 - A strong brand benefits student recruitment, alumni relations, government relations, fund raising, and more.

What Is the Role of the Comm./Mktg. Office?

- Conduct strategic programs designed to engender support among key publics for the institution and its goals.
- Manage institutional reputation and responses to issues that may affect it.
- Coordinate communications and marketing efforts across the organization.
- Provide specific communications and marketing services to client offices throughout the institution.

How Can Communications/ Marketing Help the CEO?

- Facilitate two-way communication with those who are key to institutional success.
- Apply knowledge of the external environment to shaping the institutional strategy.
- Frame decisions and messages from the recipients' perspective.
- Disseminate the CEO's vision and enlist advocates in its implementation.
- Engage the campus community in the communications and marketing effort.

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The Case: Fund Raising

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What is the Role of the Fund Raising Office?

- Secure additional resources to support strategic priorities.
- Match sources of philanthropic support with institutional priorities.
- Undertake feasibility studies of philanthropic potential.
- Engage volunteers in the life of the institution
- Align donor interest and institutional need.
- Ensure that the institution follows professional and ethical standards.

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How Can the Fund Raising Office Help the CEO?

- Generate private support for the CEO's vision.
- Advise the CEO on addressing donor interests and concerns.
- Contribute to an atmosphere of trust and collaboration.
- Build support for long-range planning.
- Help focus the CEO's time effectively.



You are involved in:

- a noble profession,
- enhancing educational quality,
- expanding educational opportunity,
- creating a better world.

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Your Thoughts Your Questions

Thank you!

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