

The Strategic Role of Advancement in Education

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COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION

Please note: links to additional resources can be found at the [end of this presentation](#), including Circle of Excellence award-winning entries and a case study.

- **About Advancement**
- Strategic Advancement
- Making the Case
 - Alumni Relations
 - Communications and Marketing
 - Fund Raising
- Keys to Success
- The Strategic Advancement Professional

What is advancement?

Advancement is the set of functions at an educational institution dedicated to the **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

Why is advancement important?

- **Reputation:** Your institution's ability to attract students, faculty and staff relates to its reputation
- **Relationships:** Your reputation and external support are influenced by your relationships with key constituencies
- **Resources:** Your institution's ability to attract resources and fulfill its mission rely on both its relationships and its reputation

What are the obstacles to effective advancement?

- Lack of **understanding**
- Lack of **support**
- Lack of **structure**
- Lack of **resources**
- Lack of **strategy**

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Tactical advancement

- Visibility for the sake of visibility
- The more contacts, the better
- Funds for the sake of funds

Strategic advancement

- Strategic positioning
- Strategic relationships
- Strategic fund raising

What is strategic advancement?

- Tied to institutional mission, goals
- Measurable objectives
- Segmented audiences
- Research based
- Organized in a plan
 - Tactics support strategy
 - Resources aligned with goals
- On-going evaluation of results

What are the institutional benefits?

- Fulfillment of institutional mission
- Achievement of institutional goals
- Enhanced
 - Reputation
 - Relationships
 - Resources
- Effective use of human and financial resources

What are the professional benefits?

- Increased stature
 - for the advancement professional
 - for the advancement office
- Greater institutional understanding, support
- Seat at the table

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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 does the alumni relations office help the institution?

- 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

***What is the role of the CEO
in alumni relations?***

- Foster long-term relationships with alumni
- Acknowledge alumni contributions
- Seek alumni counsel
- Engage alumni in meeting strategic goals
- Involve alumni in decision-making
- Champion the institution's traditions, history
- Ensure a positive student experience
- Create a collaborative, service climate
- Invest for the long haul

Northwestern University Alumni Association

- Developed a “Countdown to Commencement” program to improve senior class giving and engagement, establish tradition of giving for future alumni
- Tripled number of student donors; increased seniors who signed up for e-mail forwarding accounts

*2005 CASE Circle of Excellence Gold Award,
Alumni Relations Programs, New Programs Category*

http://www.case.org/files/Awards/2005_COE_Winners/1_Alumni_Relations/1f_Northwestern.pdf

Hong Kong Polytechnic University

- Developed “Greening Hong Kong by PolyU Alumni” program to connect alumni with community, each other, and university; build image of university and alumni associations, support government greening campaign
- Engaged 1,000 alumni, earned focused media coverage, built relationships among alumni groups

*2005 CASE Circle of Excellence Grand Gold Award,
Alumni Relations Programs, Overall Category*

http://www.case.org/files/Awards/2005_COE_Winners/1_Alumni_Relations/1b_HongKong.pdf

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 FY 06 with 12 more to be added over two years

What do the terms mean?

Public Relations: The management of relationships with key internal and external constituencies

Communications: The process of exchanging information with key internal and external constituencies

Marketing: The strategic adaptation of price, product, placement, and promotion in the marketplace

Integrated Marketing: The coordination of marketing across the institution

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
- A strong brand benefits student recruitment, alumni relations, government relations, fund raising and more

What is the role of the communications and marketing office?

- Conduct strategic programs designed to engender support among key publics for the institution and its goals
- Manage institutional reputation and response 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 against the framework of institutional goals

How can communications and marketing help the institution and 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

How can the CEO help communications and marketing?

- Serve as chief spokesperson and communications role model
- Embrace your role as a public figure
- Remember that you are never off the record
- Include communications professionals in institutional decision making
- Ask the experts to help you address communications weaknesses
- Don't shoot the messenger

The University of Manchester

- In response to merger, conducted research on perceptions, engaged stakeholders in discussion, developed and launched an institution-wide branding project
- Built buy-in of senior management, conducted survey demonstrating high brand value (78 percent indicating that the university is “exciting”), increased applications

***2005 CASE Circle of Excellence Gold Award,
Institution-Wide Branding Programs***

http://www.case.org/files/Awards/2005_COE_Winners/36_Instit_Wide_Brand_Prgms/36_Manchester.pdf

York University

- Developed “reputation campaign” including advertising and direct mail campaign to define institution as a “first choice” among prospective students, build reputation and target audiences
- Exceeded enrollment targets, improved quality of incoming class

*2005 CASE Circle of Excellence Grand Gold Award,
Advertising*

http://www.case.org/files/Awards/2005_COE_Winners/38_Advertising/38_YorkU.pdf

Phillips Exeter Academy

- Communications, development and alumni staff collaborated to develop a film as part of a multiple-media effort launching a \$305 million campaign in 2005
- Word-of-mouth related to quality of film contributed to record attendance at alumni events launching campaign

*2005 CASE Circle of Excellence Grand Gold Award,
Electronic Media Communications*

http://www.case.org/files/Awards/2005_COE_Winners/12_Elec_Media_FundRaising/12_PhillipsExeter.pdf

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

How can the fund-raising office help the institution and its CEO?

- Generate support for vision and mission
- 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
- Ensure that the institution follows ethical standards

What is the role of the CEO in fund raising?

- Embody the essence of the institution
- Communicate honestly and clearly about your goals for the institution
- Exhibit enthusiasm for your vision so friends will commit “beyond reason”
- Identify institutional priorities worthy of support
- Set aside time for personal interactions with donors and prospects

What is the role of the CEO in fund raising?

- Make volunteers feel valued
- Share information with the development office from relevant meetings
- Help others within the institution understand the importance of fund raising and value the investment in the effort
- Create a culture of collaboration and accountability

University of Maryland Baltimore County

- President and advancement vice president set three strategic objectives in preparation for a capital campaign: focus development on corporate community, connect with business leaders, and build institutional profile
- Focused, coordinated efforts caused endowment to grow 10-fold and annual giving to increase

<http://www.case.org/files/PDF/case55.pdf>

Clarkson University

- Development staff created a “Share Clarkson” fund-raising program to encourage successful, first-generation college graduates, to support scholarships for students in need
- Targeted approach motivated donors, created scholarships for nearly 70 students, and helped build institutional endowment

*2004 CASE Circle of Excellence Grand Gold Award,
Development Programs*

http://www.case.org/files/Awards/2004_COE_Winners/2_Development/0402_Clarkson.pdf

University of Miami

- Reconfigured annual fund phone program by investing in technology and training for student callers and better segmenting audience
- Pledge payments secured by well-trained student ambassadors grew annual fund by 279 percent over the previous year

*2003 CASE Circle of Excellence Gold Award Winner,
Development Programs*

http://www.case.org/files/Awards/2003_COE_Winners/2_Development/2a_miami.PDF

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What unifies the advancement disciplines?

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

What are the keys to success?

Integration: Whatever the organizational structure, the integration of advancement functions improves results

Strategic Role: Whatever the discipline, the advancement functions are most effective when they have a place in the inner management circle

Applied Social Science: Whatever the initiative, a research-based approach will increase the return on investment

What are the keys to success?

- Develop strategy based on mission
- Segment constituencies
- Conduct research
- Set goals for attitudes/behaviors
- Align resources
- Engage stakeholders
- Implement tactics
- Evaluate results

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What is the role of the CEO?

- **Visionary** who openly and consistently articulates a clear vision for the institution
- **Role model** who sets the management behaviors of the leadership team
- **Advocate** who champions both the institution and its advancement efforts internally and externally

What is the role of the CEO?

- **Face of the institution** who represents the values, the promise, and the integrity of the institution with key constituencies
- **Resource provider** who invests the human and financial resources needed to ensure the desired results from the advancement operation

What is the role of the strategic chief advancement officer (CAO)?

- **Missionary** who advocates for the institutional mission and builds support among key constituencies
- **Strategic** manager who designs and leads advancement programs in support of institutional strategy
- **Leadership team member** who works collaboratively across the institution to achieve institutional goals

What are the characteristics of the strategic advancement professional?

- Mission-centered and focused
- Knowledgeable
- Skilled
- Aware of internal and external environments
- Engaged in the life of the institution
- Proactive
- Ethical

What are the behaviors of a strategic advancement professional?

- Ties strategies to goals
- Seizes opportunities
- Proposes solutions
- Maintains objectivity
- Works collaboratively
- Takes the long-term view

Why are strategic professionals committed to educational advancement?

- You are involved in a noble profession
- You enhance educational quality
- You expand educational opportunity
- You contribute to a better world

Circle of Excellence Award Winners

Alumni Relations Programs - New Program Initiatives

Northwestern Alumni Association: *Countdown to Commencement*

http://www.case.org/files/Awards/2005_COE_Winners/1_Alumni_Relations/1f_Northwestern.pdf

Alumni Relations Programs - Alumni Programs

The Hong Kong Polytechnic University: *Greening Hong Kong by PolyU Alumni*

http://www.case.org/files/Awards/2005_COE_Winners/1_Alumni_Relations/1b_HongKong.pdf

Institution-Wide Branding Programs

The University of Manchester

http://www.case.org/files/Awards/2005_COE_Winners/36_Instit_Wide_Brand_Prgms/36_Manchester.pdf

Advertising

York University: *Reputation Campaign*

http://www.case.org/files/Awards/2005_COE_Winners/38_Advertising/38_YorkU.pdf

Electronic Media - Fund-Raising Features

Phillips Exeter Academy: *The Exeter Initiatives*

http://www.case.org/files/Awards/2005_COE_Winners/12_Elec_Media_FundRaising/12_PhillipsExeter.pdf



Additional Resources

Development Programs

Clarkson University: *Share Clarkson* Direct Scholarship Program

http://www.case.org/files/Awards/2004_COE_Winners/2_Development/0402_Clarkson.pdf

Development Programs - Annual & Regular Giving Programs

University of Miami Alumni Association: *Phone Campaign Makeover*

http://www.case.org/files/Awards/2003_COE_Winners/2_Development/2a_miami.PDF

Case Study

Vision, Vitality, and Partnership Equal Success

Institutional Advancement at the University of Maryland, Baltimore County

<http://www.case.org/files/PDF/case55.pdf>

Professional
Development
ADVOCACY

INTEGRITY

Resources

SERVICE

Recognition

ETHICS

Thank you.

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