

# What Every CEO Should Know About Advancement

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

MILLENNIUM LEADERSHIP INITIATIVE

JUNE 28, 2005

CASE.

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## What Is Advancement?

Advancement is the set of functions at an educational institution dedicated to strengthening relationships with key constituencies, including:

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

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## 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

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## What Unifies Advancement?

All of the advancement disciplines are united by:

- the common goal of ensuring the long-term 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-term success.

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## 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.

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## What Are the Keys to Success?

### Strategic Relationship Management:

- 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 for the leadership team.
- **Advocate:** who champions both the institution and its advancement efforts, internally and externally.

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## What Is the Role of the CEO?

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

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## What Are the Roles of CAOs?

- **Missionaries:** who advocate for the institutional mission and build support among key constituencies.
- **Strategic managers:** who design and leads advancement programs in support of institutional strategy.
- **Leadership team members:** who work collaboratively across the organization to achieve institutional goals.

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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.

## How Can the CEO Help the Alumni Relations Office?

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

## What Should the CEO Keep in Mind Re: Alumni Relations?

- Not all alumni are sports fans; not all sports fans are alumni.
- Alumni represent the institution's most enduring constituency.
- Don't ignore the general alumni base during capital campaigns.
- Alumni need to be recognized, valued, stewarded.

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# Communications & 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 product, price, 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 C&M 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 President's vision and enlist advocates in its implementation.
- Engage the campus community in the communications and marketing effort.

## How Can the CEO Help Communications & 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.
- Allow the experts to help you address communications weaknesses.
- Don't shoot the messenger.

## What Should the CEO Keep in Mind Re: Comm. & Marketing?

- It's more about listening and acting than talking and reacting.
- Repetition builds reputation – in word and deed.
- Greater stature means greater scrutiny.
- Good news is no news (tension makes the story).
- Quality is more important than quantity.
- Research is a smart investment.

## What Should the CEO Keep in Mind in a Crisis?

- Bad things happen to good institutions; it's how you respond that matters.
- You can't "semantic your way out of a strategic fuddle."
- Tell the truth, early and often.
- Use the opportunity to demonstrate institutional values in action.

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# What Are the Keys to Fund Raising Success?

- Planning.
- Research.
- Energy.
- Optimism.
- Patience.
- Stewardship.
- Coordination across the institution.
- A comprehensive approach (major gifts, annual fund, planned gifts, etc.).

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# What Are the Keys to Fund Raising Success?

- Asking!

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## How Can the Development Office Help the CEO?

- Generate private support for your vision and institutional goals.
- Advise you on addressing donor interests and concerns.
- Contribute to an atmosphere of trust and collaboration.
- Help you focus your time effectively.
- Ensure that the institution follows professional and ethical standards.
- Deliver and report results.

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## 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 private support.
- Devote at least 30 percent of your time to cultivation, solicitation and stewardship.

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# 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 the fund-raising effort and the value of the investment in that effort.
- Create culture of collaboration and accountability.

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## What Should the CEO Keep in Mind Re: Fund Raising?

- Engagement yields giving.
- Small gifts lead to large gifts.
- ROI varies widely.
- People give to winners.
- People give to people.
- You are asking on behalf of the community, not yourself.
- Be prepared to hear “no.”
- Be prepared to say “no.”

## What Should the CEO Keep in Mind Re: Fund Raising?

- Campaigns stop being special when they never stop.
- Priorities are set by the institution, not the development office.
- Stewardship is everyone's business.
- What you do in fund raising will be an important part of your legacy.

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**Thank you!**

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