



COUNCIL FOR ADVANCEMENT  
AND SUPPORT OF EDUCATION

# Championing Advancement

CASE 2022-2027

## ***Dispatch from a CASE member...in June 2027***

*It is June 2027. You have successfully served as a change agent at your institution for the past five years, collaborating with your colleagues across the institution and driving strategic goals affirming your institution's pivotal place in the community well into the 2030s. You have led your team effectively and directed remarkable success in your portfolio. Moreover, you have served as a trusted partner across your institution's executive leadership team.*

*Your institution has built greater financial stability; the student pipeline is well articulated and strategically approached; a diverse array of constituents are engaged and stewarded in a consistent manner that helps them feel personally connected to the mission, values, and progress of the institution; fundraising goals are regularly met, revisited, honed, and achieved again; members of the community—including government officials—are engaging more with the powerful role your institution plays in advancing education and transforming lives and society.*

*Looking back over these years, what do you say to others about how CASE supported you in leading your institution's success? Why did you insist, year after year, on renewing your CASE membership and increasing your budget allocation to CASE?*

*You can give three reasons:*

- 1. Because CASE provided you with the network, perspective, and tangible support that led to more philanthropic support for, students enrolled in, and stakeholders engaged with your institution*
- 2. Because CASE provided you with the standards, principles of practice, context, understanding, and connections to be a strategic partner with your institution's leadership, external constituencies, and staff*
- 3. Because CASE helped you map your team to CASE's Career Journey Framework, enabling you to ensure that everyone at your institution who is tasked with championing its success can access a professional curriculum that will elevate their knowledge and root them in globally tested, regionally specific skills and tools*

*CASE has been your professional home and more: It has enabled you to thoughtfully strengthen advancement across your institution to help achieve your mission. CASE has been the go-to resource as you helped your institutional colleagues understand the purpose, role, and vitality of the work that you and your team do every day to secure the institution's brand position, robust enrollment, thoughtful philanthropic support, and quantifiable good will among its key stakeholders.*

## INTRODUCTION AND KEY FOCUS AREAS

Educational institutions operate in an environment distinguished by rapid economic change and disparate views of the role and quality of education. Support varies dramatically from country to country and region to region and can be affected by the ups and downs of the local economy and by public perception of how well an institution fulfills its mission and serves the needs of its community.

In that context, a strong and effective advancement operation plays an ever more important role in sustaining institutional health and vitality. Professionals in educational advancement—fundraising, alumni relations, marketing and communications, and advancement services—are committed to the success of the institutions they serve, building on an understanding of the principles, standards, strategies, and techniques of the advancement disciplines. Serving schools, colleges, universities, and related institutions worldwide, CASE is the preferred strategic partner and professional home for advancement professionals worldwide.

*CASE stands as the undisputed leader in educational advancement.*

Building on the ambitious achievements of *Reimagining CASE 2017–2021*, a strategy informed by the voices of more than 2,500 members and volunteers, CASE leadership began the development of a new

strategic plan. Grounded in a review of the value that we have provided for decades and an analysis of what advancement professionals in education need now and will need in the future, we underwent a recalibration process that led to our new strategic plan, *Championing Advancement: CASE 2022–2027*. This plan centers on the steps necessary to achieve our strategic intent: **defining the competencies and standards for the profession of advancement, and leading and championing their dissemination and application across the world’s educational institutions.**



As part of our process to implement the *Reimagining CASE 2017–2021* strategic plan, CASE underwent a governance transition that resulted in a more coherent, manageable structure with one fiduciary board plus regional councils and district cabinets representing members in all parts of the world.

So, what is strategic intent? In simple terms, our strategic intent is about building on assets CASE already possesses and taking them to a new level of impact and success.

Through these efforts, we will transition from providing a menu of many different and separate offerings to fully embracing a member-oriented approach that provides a clear and coherent framework for an advancement professional’s career journey—including critical training,

diversity resources, data, research, and advocacy for the sector. We have many of the pieces already in place with our CASE Global Reporting Standards, Statement of Ethics, Principles of Practice, Competencies Model, surveys, and numerous services developed over years.

At the same time, there is considerable and intentional work required over the coming months and years to combine and refine what we do to provide the resources every advancement professional, and institution needs to succeed.

We now have a tremendous opportunity to provide leadership in fostering and stewarding the professional advancement community, supported by a coherent Career Journey Framework and a defined body of standards and benchmarks. Our history, reputation, and membership place us in the unique position to confidently own this space.

Our **vision** is more relevant than ever: advancing education to transform lives and society.

Our **mission** remains firm: As a catalyst for advancing education worldwide, we inspire, challenge, and equip communities of professionals to act effectively and with integrity to champion the success of their institutions.

We embrace our **values** enthusiastically: We value professional excellence, integrity, and respect for our community of volunteers and staff as partners, stakeholders, and leaders. We aspire to be bold, agile, and innovative. And we are committed, in all that we do, to being collaborative and inclusive and to embracing diversity.

We are continuing on a path for success in the future with a member-oriented business model and clear priorities setting the foundation for our work. The global pandemic has not changed our path—but it has accelerated our desire to seize the opportunity that we have before us and to boldly assert our direction as we embrace the promise of our vision, mission, and values.

## **Our Key Focus Areas**

Through *Championing Advancement: CASE 2022–2027*, we will build upon our deep expertise, core assets, and strong reputation to provide institutional leaders with the support they need to be partners in delivering institutional strategy.

To continue and expand our leadership role, we will focus on six key areas:

- Educational programming
- Global membership
- Data and research
- Thought leadership
- Diversity, equity, inclusion, and belonging (DEIB)
- People and culture

These six key areas are interconnected and mutually supportive. Collectively, they will contribute to a coherent whole that will foster a vibrant professional community and allow for a cohesive member experience.

## ***Educational programming***

Our global education strategy will allow for the full application of the CASE Career Journey Framework based on the CASE Competencies Model unveiled in 2019. By participating in online and in-person programming, advancement professionals at all levels of experience will find their professional education goals met through progressive offerings that meet their needs at each stage of their professional journeys. Advancement leaders and managers in institutions worldwide can encourage the professional growth of staff members through sequential programming coupled with clear competency guidelines.

Educational institutions themselves will reap even greater benefits from the services of informed, energetic, and principled advancement professionals.

***The CASE Career Journey will provide the framework for greater acceptance and understanding of advancement as a profession.***



The CASE Competencies Model, delineating the skills necessary for success in the advancement profession, is instrumental to the CASE Career Journey—providing a framework for mapping relevant educational offerings for professional progress at every level.

## ***Global membership***

Consistent with our history of focusing on the needs of our professional community, we will continue our commitment to keeping member institutions at the heart of our work. We will look at ways to serve a growing and increasingly diverse community of institutions more innovatively and to engage with them in a more personal, structured way to deliver a tangible return on investment. Providing value to members will drive our membership growth strategy, which will focus on sustaining our strong existing relationships to increase membership renewal and retention, as well as growing membership in new and emerging markets through a more strategic and commercial approach to recruitment and acquisition.

The value of CASE membership to our communities of professionals and to institutional leadership will be aligned with the CASE Career Journey Framework of our educational programming portfolios.

***CASE membership will be regarded as essential to schools, colleges, universities, and specialist institutions worldwide***

## ***Data and research***

The growing importance of advancement at institutions worldwide—along with the increasing sophistication of advancement practices—connects directly to the need for reliable data as the basis for making strategic decisions. To connect strategies, practices, investments, and outcomes, our services will be available through both baseline engagement and tailored premium approaches for those with advanced needs. Continuing updates of the CASE Global Reporting Standards paired with global and regional benchmarking surveys will provide universal standards and offer comparative data for the professional community. Our work with CASE Educational Partners will further expand the reach of our standards and benchmarking data, cementing our position as a foundational resource to the sector.

***CASE will be widely regarded as the source for data to drive decision making.***

## ***Thought leadership***

As the global authority on educational advancement and a trusted source of expertise for members, media, government officials, and beyond, we will build on our established influential position by increasing our visibility among institutional leaders—including presidents, principals, vice chancellors, chancellors, heads of school, chief executives of related associations, and board members. The educational advancement expertise embodied by CASE members will be widely understood and respected by education leaders as critical to meeting institutional strategic goals. Greater recognition of the importance of advancement to institutional success will lead to greater focus on building and strengthening advancement teams—an area in which CASE is the unrivaled leader.

***CASE leadership and expertise in educational advancement will be unrivaled.***

## ***Diversity, equity, inclusion, and belonging***

In advancement, as in all fields, creating opportunities to welcome, include, encourage, train, and promote talented individuals from all backgrounds is of paramount importance. With the understanding that individuals from diverse lived experiences bring life lessons and cultural awareness to the institutions they serve, we will help our members become better attuned to the issues and concerns of the many populations with whom they work.

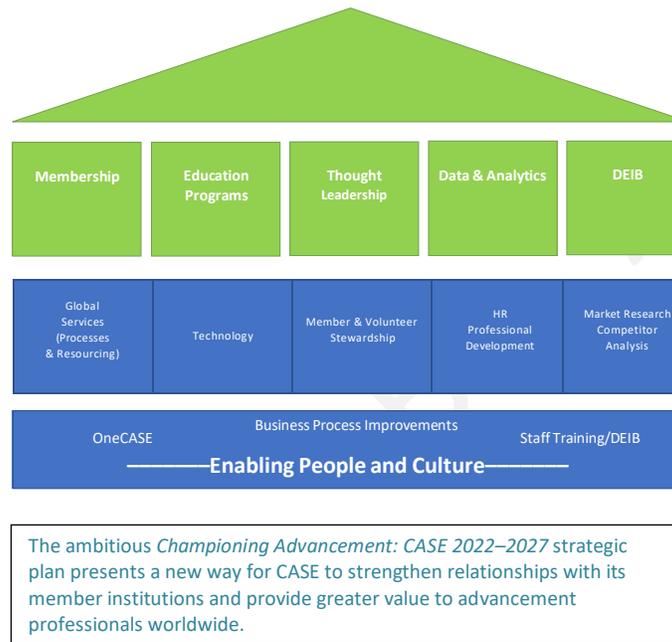
Unfortunately, advancement professionals from historically underrepresented groups face pervasive systemic barriers throughout their careers that prevent them from attaining opportunities in advancement. To make the necessary changes, CASE will dismantle these barriers by establishing a pipeline of advancement professionals (entry-level personnel, managers, and senior leaders) from diverse lived experiences and creating diversity, equity, inclusion, and belonging (DEIB) acumen for the profession, which will assist our members in hiring an advancement team that reflects the demographics of the institution's student and alumni bodies. And we will focus on building advancement capacity at minority-serving institutions. Our DEIB work will be woven throughout all our activities.

***CASE leadership in DEIB will set the standard for understanding and advancing the inclusion agenda in schools, colleges, and universities worldwide.***

## People and culture

By adjusting our internal culture, with responsibilities and interactions strengthened by our regionally based staff working together as OneCASE, we will generate greater global coherence in our new CASE management model. Reducing the time spent on operational and infrastructure tasks by streamlining our processes and supporting technologies will enable us to engage more fully in member-facing and revenue-producing activities.

And applying the staff advancement—offering sequential, bespoke opportunities for continuing education and professional progress—will be another important step toward our goal of being a leader among educational associations.



***CASE staff and leadership in all regions will fully adopt the OneCASE mantra and will work fluidly to deliver relevant and valued programming.***

## The New Business Model

The current CASE operating model is premised on a one-to-many approach. We have built a broad portfolio of offerings over nearly 50 years, which are directed to broad audiences even though our membership is institutional. We currently reach 97,000 individuals engaged in advancement across more than 3,100 institutions in 80 countries spanning four CASE regions worldwide.

With a slight but firm reframing, we will partner with senior-level decision makers to continue to develop their advancement teams across disciplines at every level of career in service of the institution’s strategy.

We will become an association that operates more explicitly in a business-to-business model versus our current business-to-individual approach. The new model will seek to ensure that our relationship is strongest with senior leaders in the institution who leads advancement, those whose titles may include chief advancement officer, chief communications and/or marketing officer, chief alumni engagement/relations officer, director of development/marketing/alumni relations, vice president for advancement, head of school, or foundation CEO, and who are expected to use their resources strategically to achieve institutional goals. We will continue to serve the entire community but will add a layer of focus and service to the leadership group, honing our opportunities and messaging to help them achieve their goals.

The five-year financial model underpinning *Championing Advancement: CASE 2022–2027* includes a combination of growing new activities and revenue streams outside of current operations, maintaining or expanding existing offerings that are already core to our value proposition, and eliminating some existing activities that no longer provide significant member benefits. We are working toward establishing a more sustainable three-way balance between educational programming, membership dues, and other revenue streams. Inherent in this new business model is a need to proactively manage and quickly adapt to change to ensure our long-term financial viability. Through a new staff structure and streamlined business processes we will establish a foundation that will allow us to regularly monitor and assess risks and opportunities as they arise and quickly change course as needed.

### **Stepping Out with Conviction**

As understanding grows among educational leaders of the importance of effective integrated advancement, we will continue to lead the profession by fulfilling the aspirations, executing the strategies, and measuring the outcomes delineated in *Championing Advancement: CASE 2022–2027*.

We decided, in developing this strategic plan, that we did not want to stand still and simply await a return to the past after the coronavirus pandemic fades. We will seize this moment of change and reframe how we do what we do with renewed energy, definition, and focus. We will be bold, agile, and innovative, as stated in our values. And we will be relentless in our commitment to our mission: acting as a catalyst for advancing education worldwide by inspiring, challenging, and equipping communities of professionals to act effectively and with integrity to champion the success of their institutions.

Through *Championing Advancement: CASE 2022–2027*, our delivery on the strategic intent will mean that CASE is the undisputed global association for the professional community of institutional advancement.

### ***Championing Advancement: CASE 2022–2027***

*Defining the competencies and standards for the profession of advancement, and leading and championing their dissemination and application across the world's educational institutions.*