



Advancement: Best Practices

The advancement office exists to contribute to the strength and vitality of the school: to build relationships with current and new constituents; to manage communication programs; to enhance special event and fundraising programs; to find new and growing sources of revenue. The operating principle of the advancement office is to provide an organizational umbrella for those functions which have been traditionally handled solely by volunteers.

The efficacy of the advancement office is assessed by measurement against clear and agreed upon annual goals for growth in engagement, constituent records and revenue.

A successful program is based on best practices for advancement, and enjoys the support of the full organizational structure.

The advancement *office* might consist of a single staff member, or a mix of staff and volunteers. The best practices described here define the work which the *office* should coordinate. Some communities, possibly most, will find this an aspirational document.

Advancement Office in the Organizational Structure

Advancement / School Leadership Interface

- Lead advancement officer is part of school administrative team and meets regularly with principal to develop and track plans and report progress toward goals
- Lead advancement officer is a sitting member, although not a voting member, of the school board (advisory or BSJ); works closely with the board advancement committee
- Lead advancement officer is part of budgeting and long range planning conversations with school leaders
- Advancement office works with Home and School Association or other parent organization to coordinate their fundraising efforts and develop volunteer leaders in the school communities

Advancement / Parish Interface

- Advancement program has the full support of pastor and parish leaders
- Lead advancement officer coordinates the schedule for annual appeal program with that of the parish
- Lead advancement officer meets as needed with pastor, parish leaders, parish staff; plays a lead role at parish calendar planning meetings; is consulted on parish fundraising plans
- Lead advancement officer and business manager (either parish or school) collaborate on gift processing system and reporting protocol

Advancement Office Operations

- Advancement salaries are part of an advancement office budget; a subset of administrative cost of the school
- Advancement office has a budget for the tools that are necessary for the job (camera, computer, software programs, printer, etc) and for services such as printing, postage, fees and subscriptions
- Budget includes funds for advertising, marketing opportunities, hospitality unless these are captured in a marketing section of the school budget
- Full time advancement officers are encouraged to continue their professional development and should be reimbursed for tuition or fees to a reasonable level

Advancement Responsibilities

The advancement office (whether the advancement officer or volunteer(s) within the purview of the officer) is responsible for this work:

Constituents

- Identifies and maintains records of contact information and detailed affiliation data for alumni, those parishioners who donate to the school, school parents, students, faculty and staff, alumni parents, former faculty and staff, business partners, memorial donors, friends of the school
- Maintains and tracks segmented communication programs with each group
- Develops / maintains communication devices that are specific to constituent affiliations at least once a year
- Provides opportunities for constituents to become more involved with school community (events, two-way electronic communication, surveys, etc.)

Alumni

- Builds a database of all alumni records, even those who can be presumed dead; tracks year of graduation for all alumni;
- Uses internal events, programs, volunteers, website, etc. to continue to gather alumni data
- Reaches out to local alumni to help with list development and planning alumni programs
- Does not solicit alumni for parish purposes unless alumni are current parishioners
- Does not share alumni data with anyone other than colleagues in an alumni program
- Does not ask alumni to pay fees for membership in an organization
- Allows alumni (with the supervision of the advancement office) to use school / parish facilities for alumni events without charge
- Administers all alumni programs / events

Enrollment marketing

These responsibilities may be held by someone other than an advancement officer; the work should be carefully coordinated with all advancement work

- Uses existing school / parish communication vehicles to keep school community in the news
- Participates in opportunities (open house, shadow dates, community fairs, etc.) to provide information about school to potential school families, donors, volunteers, etc
- Maintains current, easily accessed information on website regarding school registration process

- Identifies opportunities / areas for engaging new families; reaches out to those families via targeted marketing efforts
- Engages, trains and develops parent and student ambassadors to help with the process of inviting and welcoming new families into the community
- Works with school office to establish or refine process for engaging potential school parents

Communication Programs

These responsibilities may be held by someone other than an advancement officer; the work should be carefully coordinated with all advancement work.

- Lays out communication plan for the year using print, website, e-communication to maintain relationships with specific / all constituent groups
- Models clear, comprehensive, compelling and carefully branded language
- Develops / supports use of only branded materials for all communication to all constituents
- Uses social media, e-mail marketing program to encourage visits to the website
- Uses communication devices to support funding projects
- Prepares annual giving report for all constituents

Website

These responsibilities may be held by someone other than an advancement officer; the work should be carefully coordinated with all advancement work.

- Develops and maintains attractive, well-branded website that serves purpose of marketing, timely information transmittal to all constituents, alumni electronic community and invitation to engagement
- Includes online giving options
- Includes well-monitored opportunities for two-way communication
- Includes welcome from principal with photo; introductory information on each faculty member with photo
- Includes significant information regarding: history, mission and vision, leadership, funding opportunities and alumni

Event and Fundraising Programs

- The advancement office upholds the standards and the ethics of gift acceptance. *Specifically:*
- A gift that is given for one purpose (whether solicited or unsolicited) may not be used for any other purpose. It is unethical and illegal to do otherwise.
- Understands that a gift that cannot be used for the stated purpose must be returned to the donor.
- Assures that all leaders associated with the community, in particular principal, pastor, business manager and advancement officer, are responsible for upholding this standard.
- Understands that with the acceptance of a gift, the advancement officer becomes primarily responsible to the donor rather than to the institution.

Fundraising Program

- Advancement office oversees all fundraising programs in the community (whether or not the office is directly responsible for the program) with an eye to effectiveness, cost in volunteer hours, community / calendar fundraising saturation, and opportunity for a move to philanthropy

- Advancement receives full support of parish and school leaders in changing existing programs to achieve better results
- Advancement leads the community in the move away from transactional fundraising programs (those programs that are essentially purchase programs: candy bars, gift wrap, etc.) to a program that is rooted in philanthropy

Soliciting and Processing Gifts

- Lays out annual plan for print, electronic, and event solicitations that is strategically designed to engage all constituent groups, provide opportunities for philanthropic engagement
- Includes opportunities to inform constituents about ongoing opportunities to give
- Tracks solicitations to each constituent group
- Analyzes solicitation results for effectiveness

Annual Appeal

- Conducts an annual appeal to all constituents that includes direct mail, e-mail, personal ask and major gift components
- Develops appeal with school leadership in the context of school funding priorities
- Segments appeal according to affiliation
- Uses parish / school leaders to best effect for the success of the appeal (as event hosts, making phone calls, handwritten thank you notes, etc.)
- Carefully tracks and reports on all aspects of appeal

Restricted Gifts

- In communication with school leaders, develops a gift acceptance policy that describes school funding priorities and those gifts that would not be in keeping with current school plan; publish the policy
- Publishes information about restricted funds that are open to regular donations; maintain this information on website
- Distinguishes between those gifts that are restricted by the donor and those that are designated by school leadership.
- Tracks and produces regular reports on the use of restricted funds

Processing Gifts

- Tracks gifts from individual donors; includes gift date, amount, solicitation, intended purpose, honor or memory gift
- Records and deposits gifts promptly (within two to three days)
- Thanks donors promptly, (within two to three days) using a strategically developed plan for donor care
- Reconciles gift / account data with the business office to their mutual satisfaction
- Accepts that it is the responsibility of the advancement office to maintain the highest standard of donor care and that therefore it is their responsibility to process gifts and then share information with business office.

Grant proposals

- Is aware of grant proposal opportunities within the context of likely funding. (Catholic elementary schools are unlikely to receive funding if they: are outside the city of Chicago, have fewer than 50% minority students, have fewer than 50% students who qualify for free or reduced lunch)

- If grant funding is sought and awarded advancement office is responsible for: overseeing the correct and ethical use of grant funds; all reporting required by granting agency.

Special Events

- Oversees the event calendar for the parish to avoid a calendar full of special events, particularly fundraising events
- Develops at least one event that is aspirational for the community
- Develops and oversees event budget that reflects careful stewardship of school resources and respect for volunteer time
- Is ultimately responsible for the revenue produced by special events, even those for which the office does not have direct planning responsibility

Donor Management System

- Uses a software program for managing constituent relationships and gift data
- Chooses the program to meet the needs of advancement work; as with school management software or parish record software or accounting software, a system for constituent / donor management is specific to that work.
- Advancement program software should not be accessed by others than advancement staff; for most efficient use, software should be limited to only a few users; reports from software will provide all users or colleagues from other offices with necessary data

Reporting

- Reports on all operations of the office: gift processing, event results, solicitation data, constituent records, etc. should be designed and produced regularly to ensure transparency and ease of reconciliation between advancement and business office
- In particular, reports should be prepared monthly to report on all advancement office income: by dollar amounts; by donor affiliation; by designated purpose; by specific fund; by solicitation. Reports should be shared with school and parish leadership as necessary
- Advancement office should prepare other reports as requested by school and parish leadership