



How School Leadership Can Jump Start an Advancement Program

You have made the big decision to hire advancement staff – thank you, and congratulations!*

We know that the distribution of your resources is a major question for your community—for all our school communities—and that taking this plunge with no guarantee of immediate success is difficult.

In order to give this program, and this new staff member, the best odds for success, take great care in your next steps. Your Board and administrative team can lay the groundwork for an advancement program: work that will secure their own investment in the program, demonstrate the importance of the new venture you are undertaking, and save valuable start-up time for the new advancement officer.

Foundations for Advancement Work

The work that your new officer will do should be an extension of the work that you have already begun. He or she will be tasked with convincing your constituents to invest in your community – whether that investment is through charitable giving, enrolling their children in your school, or taking on a volunteer leadership position. Before he or she can do that, you have to have developed a program that is strong indicator of vision, excellence, and forethought. In other words, a program that is strong enough to be worthy of their investment. You need four things: a strategic plan; a clear leadership structure; a fiscal house that is in order; and donor and alumni data.

Strategic Plan

Your school needs a strategic plan—a map for your future—so that everyone who is working for the benefit of your school, or considering joining your community, knows who you are, what you believe in and where you are going. If you do not have this plan, your advancement officer has no foundation for conversation with your community. Period.

Clear Leadership Structure

Do you have an organization chart? Does everyone (each volunteer organization, each volunteer, each community leader, each staff member), know where they fit in the organization? If not, take pains to fix this now. You are hiring or have hired for a position that should either shake this org chart up (please - don't make them shake it up themselves) or fit nicely into a clear and logical slot that you have carefully constructed for them. Help everyone in your community know their own place and then help them understand the place the new guy will have.

Orderly Fiscal House

Yes, ideally we mean that your school is already fiscally sound – advancement can do much for your school but rarely does it produce miracles. Short of fiscally sound, we mean that at least you can show well-kept enrollment records going back at least ten years; that you can show clear and sound tuition setting and collection records; that you have evidence of being in good standing with your creditors, including the Archdiocese of Chicago. Do you have profit and loss statements for fundraising events and programs, even if they were run by volunteers? Do you have processes in place to insure accountability?

Donor Records

Even without an advancement officer your school has received gifts in the past and your school has alumni. Do not wait until the officer is in place to gather and examine those giving records. If you don't have an alumni database don't leave this time consuming work to the new guy. Do it now. Gather this information in an Excel spreadsheet where it can at least be safely stored and will be available for import into a donor management system someday.

Finally

When you have advancement staff on board, it is the school leadership, the folks that have been laying the foundation for what's next, who should take care to introduce and offer a warm, public welcome for their new partner in the work of advancing the school. This is an essential step for a sound program, especially one that is so foreign to the current community.

It is not just that your efforts to prepare for an advancement program will benefit the new officer and help him or her to begin their real work weeks, possibly months, before they might have otherwise. It is that you, too, as part of the administrative team or the Board will have learned more about your institution and about the ways that, going forward, you can help it advance.

***Or you haven't made that big decision but you see the benefits that an advancement program might help you reap. You can still do – must do – all this preparatory work and then share the work of next steps, too.**

*Lynn Fredrick
Advancement Consultant
Office of Catholic Schools
Archdiocese of Chicago
lfredrick@archchicago.org*

Related reading available on the OCS Resource Portal:

*Ten Questions a New Advancement Officer Should Ask
The Principal – Development Director Partnership
Advancing the Institution (Board Involvement Only)
The Data You Need to Advance Your Institution
Why You Need a Donor Management System*

January 2015