

**21<sup>st</sup> Century Leadership Institute for Provosts and Chief Academic Officers  
Advancement and Its Key Role in Presidential Success**

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Washington, DC**

Questions for participants (Y/N):

*At my institution:*

Advancement issues have a recurring and important place in the cabinet's agenda;

Our strategic plan sets the priorities for the advancement program, especially communication and fundraising;

Our advancement program oversees the alumni, development and communications functions;

*As provost or vice president for academic affairs:*

I communicate the institution's goals and needs to some or all of the following groups: faculty, students parents, alumni, prospective donors and members of the community;

I have partnered with the President and/or the VPIA to ask for a major gift;

I have assisted deans in becoming more involved in fundraising;

I help educate the advancement team about academic programs and priorities;

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Advancing a college's or university's mission by maximizing its achievements and fulfilling its dreams involves a coordinated effort of leadership and an alignment of strategic academic planning with communications, marketing, internal and external relations and constituency building, and a development program that promotes a culture of philanthropy and the stewardship of donors.

Advancement is often the code word for fundraising or development. But advancement is really a collection of disciplines, whether or not they are functionally included within the advancement office. In addition to development, a comprehensive advancement operation must include, communications and media relations, marketing, alumni affairs, and external (community and governmental) affairs. Even if these functions are organized as separate units, it is essential to have a high degree of coordination with advancement if the institution's message and full potential in any single area are to be realized. Because communications, marketing and alumni affairs have been the focus of separate presentations at the institute, I will focus on advancement's role in development or fundraising.

Roy Shilling has pointed out that a successful advancement program must be based on a clear vision and a strong academic plan for the future. I fully agree with this premise and would add **that it is critical to align any advancement/development plan with the institution's strategic plan or goals.** To raise money, development programs must have a good product, a worthy cause, and a compelling message. I think it is also helpful to **communicate the goals of the plan and your fundraising needs in the same way to internal and external audiences,** as it helps build faculty support for your philanthropic efforts. In addition, to an aligned plan and a seamless communications message, **successful fundraising programs require strong collaboration of all advancement disciples and an effective development staff and data infrastructure.**

Advancement efforts at public institutions are looking more and more like their counterparts at private institutions. While public institutions may not need to fund a substantial percentage of the operational budget with the annual fund drive, they may require private dollars for capital projects, academic programming and student financial support.

Development is about relationships; it is a people business where authentic friendships and good two-way communication is paramount. Some folks view it as match-making

because over-time it identifies and connects the interests of the donor with the needs of the institution. It is a process that takes time. Cultivation does not end with a first gift. It describes a continuing relationship between the institution and the donor that is facilitated through good stewardship of the initial gift.

Presidents and Vice Presidents for Institutional Advancement (VPIA) are the heavy hitters when it comes to engagement of the major donors. Both must be perceived as leaders who have an affectionate vision and an achievable strategy for the institution. Your VPIA and his/her major gift officers must have personalities that “play well” with prospective donors, -- “folks you’d like to see coming to visit.”

Presidents and their Vice Presidents for Institutional Advancement must work as a team. Obviously the extent and nature of presidential involvement varies. **Most presidents want to be used strategically; saving their time for the relationships that they can cultivate most effectively or the prospective donors who will be key to a campaign’s success.**

The fit (personal comfort and communication) between the president and VPIA is critically important to the success of creating a team and to navigating all development decisions. **As a president, you must identify your preferred role and think about the kind of associates who would work most effectively within your cabinet.** When it comes to recruiting or working with a seated advancement vice president, you must think of those attributes that will complement or enhance your own skill set. You must think of qualities you’d enjoy in a travelling partner in Florida, California and Arizona!

It may take time to assess your fit with all members of the leadership team when you join a new institution. Unless the trustees have clearly indicated that they expect you to clean house, you should take enough time to assess the leadership skills and achievements of your vice presidents. Presidents who change the members of their team too quickly after taking office may risk a great deal. Even if change is clearly indicated take enough time to learn institutional history, develop independent relationships with key players and evaluate strengths of mid-level up-and-comer staffers. If an area like advancement is weak or non-functional, however, one cannot wait too long to address it.

**You must also know enough about what an optimal advancement infrastructure looks like to assess what technical and managerial skills you’ll need in an advancement leader.** Understanding the role and organization of annual funds, planned giving, research, stewardship, major gifts and so forth provide insights into the future resource and leadership needs of the area. Looking at the way in which communications, marketing and alumni affairs are coordinated with development efforts provides another important assessment of the strength of the institutional advancement infrastructure. The stronger the infrastructure, the greater the success, the deeper the culture of philanthropy, the greater the opportunities are to build from the existing program. If you need to build and expand an advancement office, you’ll need a vice president who knows how to do this and who can attract strong staffers. **As president, you don’t need in depth**

**technical knowledge but you must know enough to evaluate the recommendations from internal advisors or from specialized advancement consultants.**

**Think strategically about your advancement priorities and the best use of your time in engaging with donors.** Trustees and other institutional leaders include many of your major prospects or are individuals who are able to connect you to those prospects. Much of your time must be spent getting to know these people personally. Your goal is to build trust as you educate and motivate them to advocate on behalf of your institution.

**In Summary:**

Align your institution's strategic (academic) goals with its development (fundraising) goals.

Communicate these goals in the same way for your internal and external audiences.

Develop a good generalist's knowledge of all the advancement disciplines and the optimal articulation of those specialties, given your institution's structure and history.

Take a multi-disciplinary approach to advancement and guard against building silos.

Develop your own philosophy about what is the most effective presidential role in advancement based on your own assets and your institution's needs.

Don't be tempted to be your own VPIA. Insist upon being used strategically.

Involve your entire leadership team in advancing the institution and share the credit.

Invest in that team and the advancement infrastructure that building for the future.

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