

28 Essential Advancement Staff Responsibilities

Whether your organization has a single advancement staff member or employs a dozen, every advancement team is responsible for 28 essential tasks to ensure your organization consistently brings in the revenue to meet its strategic goals.

While you do not need to hire 28 people to complete these tasks, you do need to make sure you have the right people with the right skills to make sure all 28 tasks are covered. School leaders, staff members, key volunteers, and board members can all have roles on your advancement team.

Each of the 28 tasks falls under one of four larger areas of responsibility: development, data services, marketing and communications, and enrollment.

12 Essential Development Roles

An organization's advancement team is responsible for 12 essential tasks that fall under the development umbrella. All 12 work toward three main goals: get supporters who are not currently giving to give to your organization, maintain relationships with current supporters so they continue giving, and encourage supporters to give more.



1. Reporting/Strategy

The advancement team must develop a plan for measuring its progress. Reports should illustrate progress on meeting development revenue, net fundraising revenue goals, and any other key areas the team measures and monitors. A single point person should be responsible for the team's reporting.

2. Database & CRM Ops

Organizations run on their databases. Someone on the advancement team needs to make sure the development side of the organization's database is regularly maintained to team standards.

3. Events

Not only are events key engagement opportunities, they are important revenue generators for organizations. The advancement team is responsible for managing fundraising events from start to finish. This includes a strategic plan for executing on-brand events, keeping an events calendar, handling registrations, and day-of logistics.

4. Annual Fund

Someone on the advancement team must be responsible for marketing to annual gift supporters and moving annual givers toward the moves management path for larger gifts. Responsibilities include developing the annual giving strategy and ensuring it is implemented with excellence.

5. Lead Annual Fund

Lead annual gifts are the bridge between annual givers and major gift supporters. The advancement team must identify the annual givers who are ready to step up their giving and employ peer-to-peer solicitation to encourage them to give more.

6. Moves Management

Similarly, someone on the advancement team must be responsible for the process behind supporters giving at a more generous level. The moves management process cultivates relationships with major, leadership, and transformational gift givers. The person responsible for overseeing the process must manage supporter data and people speaking the supporters in the field.

7. Major Gift Team

Most organizations have several people who focus on soliciting gifts from major gift supporters. Someone on the advancement team needs to support the major gift team to make sure they have the tools and training to make them successful.

8. Alumni/Parent Relations

It should be someone's responsibility to build relationships with alumni and parents. These relationships can fill gaps in capital campaigns and other fundraising initiatives.

9. Corporation & Foundation Relations

Someone should spearhead efforts to build relationships with businesses and nonprofit foundations that may identify future support for your organization.

10. Volunteer Solicitors

Your volunteer solicitors are lightning in a bottle—when managed well, they build your advancement capacity. Someone on your advancement team should be responsible for training and growing your volunteer pool to find people who want to help your organization grow.

11. Planned Giving

Planned giving, including legacy gifts and donor-advised funds, can provide long-term support for your organization. Your advancement team must have someone helping these supporters create their giving plans and cultivating relationships with potential legacy supporters.

12. Stewardship

Gift stewardship is essential to sustain any advancement strategy. Someone on your advancement team must be responsible for making sure every gift is recognized and every giver is thanked for their contribution. Good stewardship also includes a plan for staying in touch with long-term givers.

7 Essential Enrollment Roles

Advancement teams have the challenge of engaging families already enrolled at your school with your mission and vision. They also work in the community to identify interested families and encourage them to enroll.

13. Reporting/Strategy Director

This person is responsible for setting the enrollment strategy and establishing the reporting that needs to be compiled and distributed.

14. Community & Feeder School Relations

Someone on the advancement team should be responsible for cultivating relationships with community organizations that push families toward your organization. This could include preschools, parochial schools, parishes, congregations, and alumni groups.

15. Database/CRM Solutions

An advancement team member must be responsible for entering information on families, maintaining health records, recording financial aid information, and identifying potential families.

16. Volunteer Ambassadors

Advancement teams should identify the volunteers who can act as ambassadors for your organization. At schools, parents make excellent ambassadors, as they can speak from their own experiences. Maintaining a crew of volunteer ambassadors can take pressure off your paid staff.

17. Events & Tours

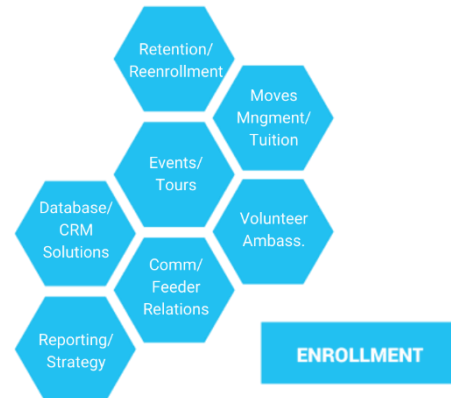
The person responsible for enrollment events and tours manages the organization's process for running an excellent event, registers guests, and performs on-site outreach, such as tours.

18. Enrollment Moves Management

Someone must be responsible for preparing families and students for enrollment. They should walk families through the financial aid process, assess student academic readiness, and understand a student's specific health and nutrition needs.

19. Retention & Reenrollment

Families have a choice in where they send their children to school. Advancement teams should collect information from teachers, counselors, and parents on the student and family experience and use this data to retain students. Remember—enrollment is a constant sales process.



3 Essential Data Services Roles

Running a school requires several different data services tasks, including databases for enrollment, student services, HR, payroll, and advancement. Advancement teams have three primary tasks to ensure their data is complete and accurate.



DATA SERVICES

20. Data Integrity

When an organization uses several different databases, it is easy for data to get siloed in a single system. Someone on the advancement team needs to make sure that advancement data is one place, standardized across systems, and complete.

21. ERM/CRM Integration

ERM and CRM applications help you build and maintain your advancement database. They integrate, systematize, and automate data gathering, organization, and reporting. Someone needs to be the point person for managing these tools.

22. CRM Software Support

The CRM software support person is the staff member or volunteer who knows your CRM system inside and out. They are responsible for maintaining the software and training people on how to use it effectively.

6 Essential Marketing & Communications Roles

Six essential marketing and communications tasks ensure your organization's brand is strong and recognizable in your community and that your organization grows its pool of potential families and supporters.



23 & 24. Outbound & Inbound Marketing

Advancement teams should have a marketing coordinator who maintains a marketing calendar and process so everyone knows when families and supporters receive an email, get a phone call, or are invited to an event.

25. Advertising

Someone must be responsible for developing a process for spending advertising dollars.

26. Publications

Similarly, someone needs to oversee the editorial process for your organization's publications, including standards for visual branding.

27. Content & Voice

Your organization's brand voice should be consistent, from admissions marketing pieces and financial aid documents to family newsletters and advancement advertising. Someone needs to be responsible for maintaining a consistent voice through all content.

28. Brand & Core Message

What your organization says is as important as how you say it. Your organization's content should consistently reflect its mission, vision, and core values. Your advancement team should have someone responsible for ensuring your messaging is on-brand.

Closing Thoughts

While your advancement team is responsible for many tasks, these tasks can be completed by just a few people. Remember—you can ask key volunteers and board members to be responsible for several of these tasks, which will reduce the time and effort your paid staff invests. With everyone rowing together, your advancement team will experience success.