

Assembling and Managing Advancement Staff

An organization's mission, vision, and strategic plan provide the compass and the map to reach its advancement goals. But without engaged and competent staff and volunteers to implement its mission and plan, it is unlikely an organization will meet its fundraising and development objectives.

Advancement team staff members and volunteers are the lifeblood of any organization. Hiring and retaining the right people and letting go of staff and volunteers who no longer serve an organization's mission is absolutely essential to its success.

Gathering and Managing Your Crew

An organization's advancement team is responsible for soliciting annual, lead annual, major, leadership, and transformational gifts from supporters. They are crucial for successful peer-to-peer solicitation, especially in the cultivation of major, leadership, and transformational gifts.

The time and effort an organization spends finding, hiring, and retaining talented staff and volunteers is positively related to their fundraising success. The more time and effort leadership pours into the engaged and skilled members of its advancement team, the more successful their fundraising and development efforts will be.

Key Volunteers: Your Best Asset

Advancement team volunteers are the beating heart of an organization. They deeply understand and are committed to the organization's mission, support the mission financially themselves, and harness their enthusiasm and experience as supporters to attract and convert more supporters and advocates.

EScale Tip: Hiring and retaining good volunteers—and letting go of volunteers who are not the right fit for your advancement strategy—are even more important than hiring and retaining staff.

When a key volunteer is engaged with the mission and an experienced and skilled solicitor, they create outstanding momentum for an organization. But when their motives are misaligned with the mission or they lack the skills and comfort to solicit prospective supporters, they can be major time consumers and bring advancement efforts to a standstill. Finding, hiring, and retaining engaged and competent key volunteers should be every organization's top priority.

Key Staff and Board Members

An organization's paid advancement staff members and board members are integral to the success of the organization's mission, too. These dedicated and engaged individuals design and implement the advancement plan and help manage volunteers. Board members help and advise

key volunteers and staff along the way to ensure the team's efforts do not stray from the mission and plan.

Engaged Families, Friends, and Alumni

Engaged families and community members play a large role in any organization's advancement strategy. They are the people for whom the organization holds a special place in their hearts. They wear the organization's t-shirts and don its caps. Crucially, they talk with other people in their networks about how great the organization is. So, not only are engaged families, friends, and alumni the people most likely to contribute to the organization, they also play a critical role in reaching out to disengaged families and community members.

The Right People in the Right Roles

Identifying, hiring, and retaining the right people is just one half of the process of assembling and managing an advancement team. The other half is making sure these people are in the right roles on the team. To determine this, leaders can ask themselves four key questions.

Do They Get It?

Does the member of the advancement team understand what the organization is all about, why it exists, and why it is important? Do they understand the impact the loss of the organization would have on its community?

EScale Tip: To understand if a potential volunteer understands your mission, ask them what would happen if your organization disappeared overnight.

Do They Want It?

Do they actually want to help the organization? Service should be a selfless act. Too often, volunteers sign up to help an organization with its advancement efforts to better their own reputations or pocketbooks, whether to be more visible in the community or to promote their own business or goals. Successful advancement team members must put the organization first.

Can They Do It?

Even if a volunteer or staff member understands an organization's mission and wants to serve selflessly, certain roles on the advancement team require particular skillsets. The right volunteer or staff member should have God-given talents, past soliciting experience, and be comfortable talking about money and making the ask.

Do They Support Us?

It is very difficult for advancement team members to close supporters if they do not support the organization themselves. Generally, volunteers should be giving to the organization at the level they are soliciting. This empowers them to talk to prospective supporters on a more authentic level and ask them to join them in giving to the organization.



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Closing Thoughts

An organization's advancement team plays an essential role in implementing the organization's strategic plan, meeting its goals, and fulfilling its vision. By finding and hiring the right people and tasking them with a job that plays to their experience and abilities, organizational leaders can cultivate an efficient and effective advancement team.