

Becoming an Advancement Services Leader

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To the best of my knowledge, no one comes into this field with a degree in advancement services management. We typically enter the field by accident and work our way up, or we move sideways from units like fundraising or alumni relations. So how do you rise to the top of an advancement services department? I often refer to “[Transforming Your CIO](#),” an article by Barbara Kaufman published in *University Business* magazine in 2003 (no longer available online; the hyperlink leads to an archived version). Kaufman described eight traits of a successful technology leader:

- Functional business orientation and communication skills
- Political savvy
- The ability to balance long-term vision and basic day-to-day needs
- Good project planning and control
- The ability to influence
- The ability to identify, motivate, and develop talent (assuming you supervise others)
- A commitment to continuing education for yourself and your staff
- Vision

Kaufman did an excellent job summing up the keys to success as a technology leader. In developing a set of tips focused on advancement services, I asked several colleagues who

have moved up the ladder of advancement services or I.T. leadership what advice they would offer. The tips below are from Peter Campbell, CIO at Legal Services Corporation; Rosemary Kim, executive director of development operations at UC Berkeley; Tracy Kronzak, a consultant with Cloud 4 Good (and former technology manager at the Applied Research Center); Christina Pulawski, a consultant who advises on fundraising systems and processes (and former director of development and donor services at Loyola University Chicago); Lisa Watson, executive director of advancement services for the University of California's Riverside campus; and myself. I've organized them around four of the eight the traits that Kaufman identified.

Show functional business orientation and communication skills

- Show colleagues that you can think like they do. Leadership needs to know that you understand their vision, goals, dreams, hopes, fears, etc.
- The most important responsibility of an advancement services leader is to fully understand the advancement business, translate the business goals into operational objectives, and facilitate the implementation with the stakeholders, team members, and clients (staff, alumni and other constituents, donors, etc.). In order to effectively play this role, you must have an in-depth knowledge of the various advancement functions, use effective communication skills to understand the business requirements, and facilitate a common understanding across the whole organization.
- Get training on campaigns, alumni relations, front-line fundraising, donor stewardship, financial management, technology, data management, etc.

- Network with other advancement services leaders to learn how they play the facilitator role in their organizations.
- Ask yourself: Do you understand the big picture of the issue that's being addressed?
- Know your colleagues. I always tell people that my job is 50 percent knowledge and skill, and 50 percent knowing the people I work with.
- Communicate clearly. This can take many forms. Find out how your organization learns best. Is it a weekly newsletter? Targeted emails? Training videos? Presentations at staff meetings? And the corollary to this: Speak plainly. I've used humor, diagrams, and the occasional utterance of "magic happens at this moment" to convey simplified explanations of what needs to happen for me to do my job and for the organization to have a functioning infrastructure.

Possess (or develop) political savvy and the ability to influence

- Listen and engage. People who come from other roles in the organization often feel that, when it comes to supporting the function they started in, they can do it all for their users. Don't be a know-it-all. Involve staff in planning for new tools and upgrades; they should have the last word on what functionality is required. Value their engagement, because engagement is a precursor to buy-in.
- Continually demonstrate a proactive, service-oriented vision. It helps a lot to know what others want and need before they do. Bringing them cool solutions to problems they didn't even know they had will score big points.
- Know your audience and identify your role.

- Establish a relationship that gets you to a common win-win objective. Credibility is important in establishing any relationship; be an expert in your field.
- Know yourself. I'd rather be able to honestly say "I don't know, but I'll find out" than convince my managers that I know everything.
- Be clear about the positive outcomes of what you're doing. It took me a long time to learn that no one understood what I did, because I simply wasn't telling anyone.
- Some questions I've asked myself in these situations: How do you contribute at meetings or other interactions with decision-makers? Do you look for solutions or throw tantrums? Are you so enamored of a particular technology or process that you are blinded to whether it will be a good fit for your organization or in this particular situation? Can you demonstrate how your ideas and solutions are win-wins across the board? Are you naïve in terms of how decisions are actually made?
- Understand how your organization works and how decisions get made. You may get a seat at the leadership table, but that may not necessarily be where decisions really get made—it's where they get rubber-stamped.
- It's important to understand what leadership (singly or as a group) values. Do they value efficiency? Relationships? Predictability?
- Develop partners and allies. They can help you navigate the political waters and also help you build broader support. Pull these folks into a circle of "power users," give them resources and training, and ask for their feedback on your plans.

They'll become ambassadors for your work. This isn't an "in group"; they should help you expand the circle.

- The bottom line: Show how you and your team add value. The goal is to get colleagues to trust and rely on you so much that they feel they simply could not do their jobs without you.

Balance long-term vision and basic day-to-day needs, and exercise good project planning and control

- Plan your work and work your plan. Always do your homework, present well-thought-out plans (including timelines), and deliver the goods (preferably on time and under budget).
- It is essential for an advancement services leader to have a long-term vision. The vision may change over time, but you must have one. It should guide your day-to-day work. Balancing the short- and long-term effectively is one of your key responsibilities. Be sure to share the long-term vision with your leaders, staff, and stakeholders as often as possible. Test your vision with leaders, staff, and other colleagues. You can do this in project discussions and in day-to-day discussions. Try to get everyone on-board with the vision and keep it "active" in leaders' and team members' minds. When more people understand your long-term vision – and why it will serve the organization, donors, and staff over time – more people will understand your day-to-day decisions (assuming they're consistent with the vision). This also provides an opportunity to actually work on solving complex problems rather than fighting short-term fires.

- Develop planning and analysis skills in your advancement services organization. Develop and implement a strong and clear project management methodology and roles and responsibilities. Ensure that your team members are able to deliver on promises. Secure resources for each project upfront to ensure success.
- As an advancement services leader, you have to get work done by engaging and influencing stakeholders and building strong partnerships with resource/service providers. Doing “projects” is a great way to identify key issues/problems/objectives and get the various disparate groups on board. By “scoping a project,” the various stakeholders are agreeing to a common set of objectives. By “implementing a project,” the various groups are working together. Good project planning and control is a great way to manage teams as well as goals. It is also critical to building a credible advancement services organization and to positioning the department as a leader in the broader organization.
- Balance implementing industry best practices with doing what’s best for your organization.
- Anticipate unintended consequences. This one can be tricky. No one can think of every contingency for a project, but you can reduce the likelihood that you’ll be caught red-faced if you do your homework and ask for advice from leaders in your field.
- Get good at cost/benefit analysis and measuring ROI. At the end of the day, you have to “show them the money.”

- Don't fudge your costs. There's always pressure to do things as cheaply as possible, but if paying more for something allows you, the organization, and your users to function more efficiently, then explain the actual costs and the risks of not investing appropriately.

Identify, motivate, and develop talent and your own skills

- Hire the best staff you can afford.
- Advancement services is mostly about the staff and a bit about the technology, policies, and procedures. Imagine the kind of organization you want to develop. Model the behavior. Always talk about the kind of organization and teams you think are optimal. When you see someone with the right potential, mentor that person yourself. Give him opportunities to try new projects. Continue to be her go-to person for coaching.
- The field of advancement services is changing rapidly; the advancement industry has the same business issues and needs as other industries, and constituents are savvier. These three facts mean that the advancement services leader has to continue to improve as the expert for her organization in order to play her role effectively. Take every opportunity to talk to policy-makers, vendors, experts, and colleagues. Use new projects, initiatives, problems, and situations to research and develop knowledge in new areas. As time permits, review basics about advancement. Beware, though: You can get really excited about an area that may not be relevant to your organization. Timing is everything!

- Develop your professional network, a pool of colleagues and friends who can help you when you need it.
- Convey the need to constantly learn.

So what should you do?

I believe that the keys to becoming an advancement services leader are understanding your organization's business, long-range goals, short-term needs, and mission; showing how improved technology and business processes can help achieve those goals; hiring, motivating, developing, and retaining great staff; communicating clearly in language your colleagues can understand; finding allies and playing well with others; balancing long-term planning with day-to-day firefighting; managing staff and projects well; and understanding how things really get done in your organization so you can influence decisions. Simple, right?

In all seriousness, rising through the ranks can confer hidden advantages. It can help you speak the lingo, understand the mission, and empathize with your colleagues. Resist the temptation to think, "I can't be a technology leader because I'm just a gift processor (or report analyst or acknowledgment letter writer)." Effective advancement services leadership requires a broad skill set. Focus on how your work supports your colleagues, your organization's or institution's mission, and your department's strategy. If you lack hard skills you can take classes (AASP, CASE, ADRP, APRA, and NTEN can help you there). The soft skills are often the hardest to acquire but pay the biggest dividends.

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