

Top 10 Tips New Presidents Need to Know

Topic: *Advancement*

1. Integrate advancement into strategic planning, not treat it as a parallel operation.
2. Prioritize advancement and make room for it in your calendar.
3. In navigating donor relations, make sure to align institutional values with donor impact.
4. Expect your advancement team to know and follow the CASE Global Reporting Standards. They provide the foundation for the profession, protect institutional reputation, and outline donors' role in use of gifts.
5. The five key players in advancement are presidents, boards, deans, faculty, and advancement staff. Each has distinct responsibilities, but make sure you promote alignment across roles to accelerate decision-making and strengthen donor confidence.
6. Treat your VP Advancement as a strategic partner in translating institutional priorities, and rely on your VP for data-driven counsel.
7. Engage actively with your board members on advancement. Data indicate that board members at independent colleges and universities are key participants in advancement – they often contribute significantly and promote the interests of the institution.
8. Alumni engagement happens in four ways: through communication, experiential opportunities, volunteering, and philanthropy. Alumni who engage in the first three modes are more likely to be donors. Volunteers, in particular, are more likely to engage philanthropically.
9. Pay attention to generational differences in giving. Currently, younger donors tend to prioritize social good and community benefits. They also appreciate different types of engagement with the institution than previous generations.
10. Part of your role – and that of other senior administrators – is to deepen and improve the wider community's understanding of the work your institution does. Engagement in the civic community builds partnership, and benefits both the school and the town or city.

Suggested Readings/Resources

- Fundamentals on ethical and professional frameworks for advancement:
<https://www.case.org/about-case/what-case-stands>
- “Building and Protecting Institutional Reputation: What Governing Boards Should Know About Global Reporting Standards for Fundraising,” Sue Cunningham, AGB Vol. 30, No. 6 (Nov./Dec. 2022) <https://agb.org/trusteeship-article/building-and-protecting-institutional-reputation/>
- *CASE Insights on Alumni Engagement: 2025 Key Findings & Special Supplement* [[Link](#)]
- *CASE Insights on Voluntary Support of Education (United States): 2025 Key Findings* [[Link](#)]