

ADVANCEMENT*

Once known as “Development” and still often referred to as such, it is defined as a strategic and integrated approach to advancing the mission of your school for the purpose of acquiring financial support for your students and programs

PLEASE COMPOSE YOUR DOCUMENT IN THE NARRATIVE STYLE.

The Advancement assessment examines current efforts to promote the schools mission to all of its constituents in order to raise additional funds, goods or services to support it. It should include all practices related to advancement efforts..

A. Historical Background

- Describe the previous Advancement Planning Process used at the school.
- When was it completed?
- What were the goals/objectives?
- Were they met?
- Describe the Advancement activities at your school. The narrative should include a description of the process, the success of each component and the success of each component. Discuss each of the following:
 - Constituent Relationship Management Database
 - Alumni Association
 - Annual Fund
 - Annual Report
 - Special Events (Distinct from H.S.A. fundraisers)
 - Major Gifts
 - Grant Writing
 - Planned Giving Programs (Bequests, Annuities, Wills/Insurance Seminars, etc.)
 - Capital Campaigns
 - Endowment Fund

B. Current Advancement Efforts

- Describe the current Advancement efforts. This should include any efforts to raise long term sustainable income. The narrative should include, but not be limited to:
 1. Advancement Plan
 - a. Advancement Operations
 - b. Constituent Relations
 - c. Communications
 - i. Annual Report
 - ii. Brochures
 - iii. Fact Sheets
 - iv. Newsletter
 - v. Website
 - vi. Case Statement
 - d. Volunteer Management
 - e. Strategic Planning

- f. Stewardship
- g. Research
- h. Annual Fund
- i. Alumni Association
- j. Special Events
- k. Major Gifts
- l. Capital Campaigns
- m. Planned Giving Programs (Bequests, Annuities, Wills/Insurance Seminars)
- n. Grant Writing
- o. Endowment Fund

C. Areas of Concern

- Describe any areas of concern or any obstacles.

D. Future Goals

- Describe future goals for meeting Advancement needs for the school.

E. Using the information you gathered from the focus groups and from your research work on Advancement, formulate goals and objectives for school improvement.

Signature of Committee Chair and Members who prepared this document:

Chair: _____

Committee Members: _____

Date of completed report: _____