

# The Tie That Binds: Align Your Advancement Efforts

**SAIS Fundamentals Conference**  
**April 2022**

FACILITATED BY:

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*Consultant*

*Convener, Advancement Academy*

**ism<sup>®</sup>**



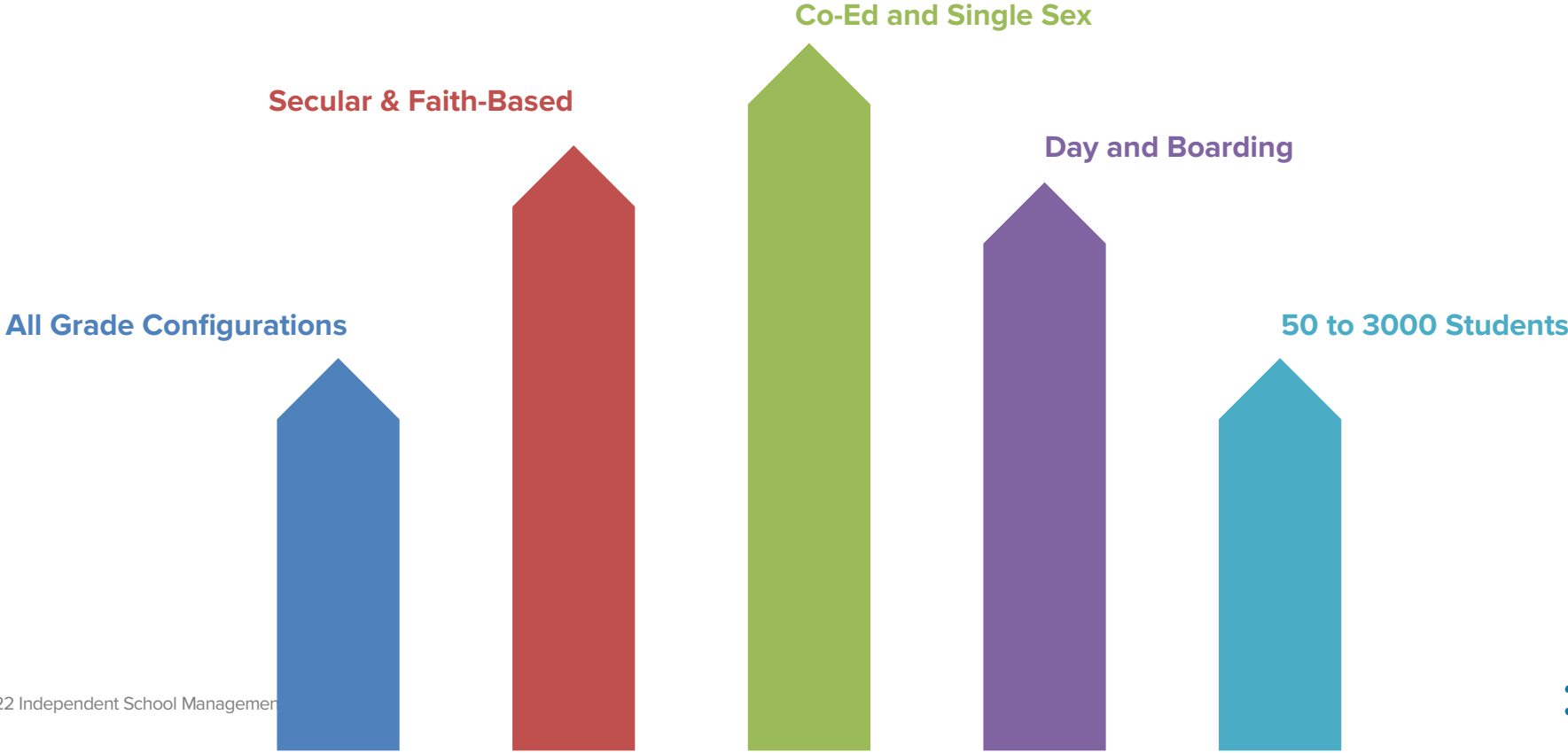


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**Advancing school leadership—enriching the student experience.**

ISM is dedicated to the advancement of school management. We provide creative strategies by combining extensive research, proven management techniques, and personalized service.

# Who We Serve





## Three Things ...

1

Joined ISM in 2010  
(Full-time in 2017)

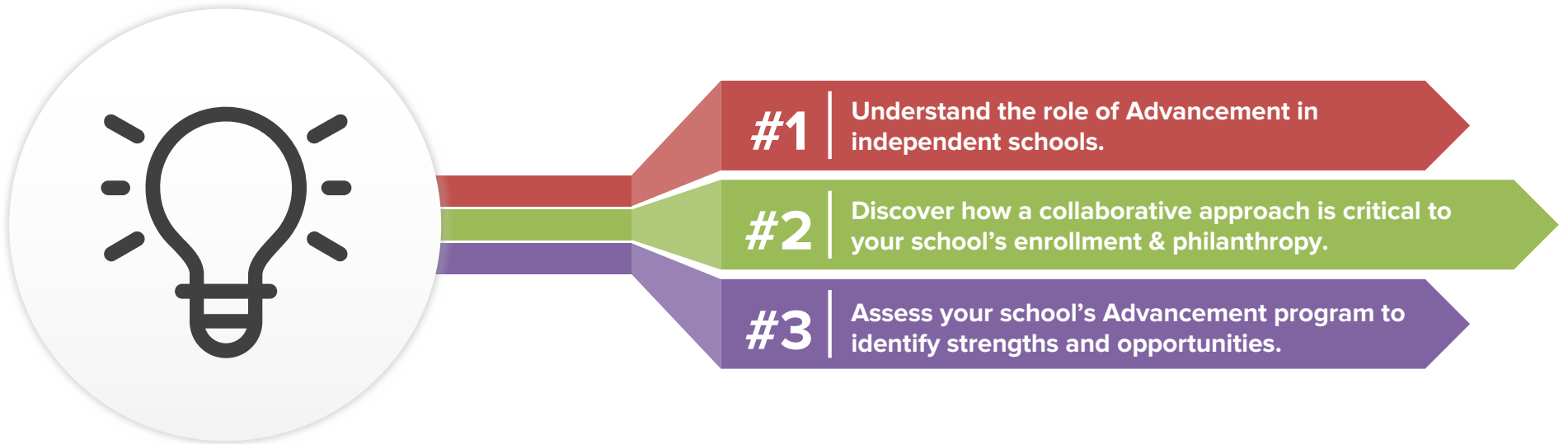
2

Spent 20 years  
working in schools and  
other non-profits

3

I have never seen the  
movie *Top Gun*

# Overview



# My Why



**What's Your School's *Why*?**

**Write down your mission.**



# What is Advancement?

Advancement encompasses all school activities that **develop, maintain, and reinforce the relationships between the school and** its current and prospective **families**, faculty and staff, alumni and their families, friends and supporters, and the greater community.





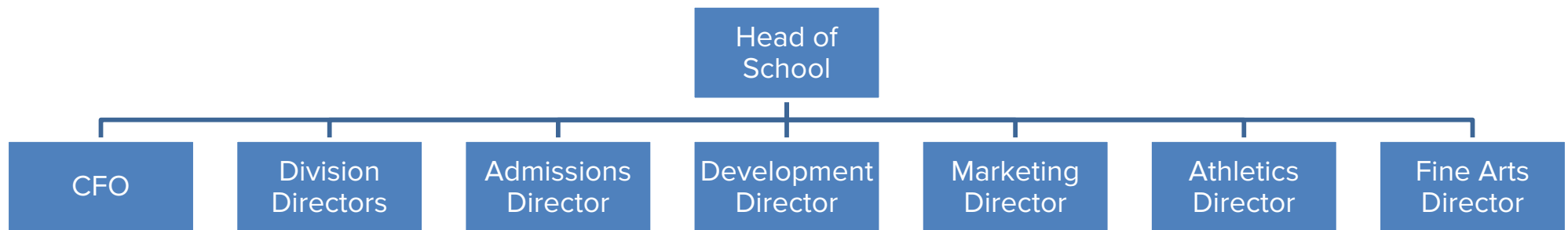
Please choose ONE card  
that best represents ...

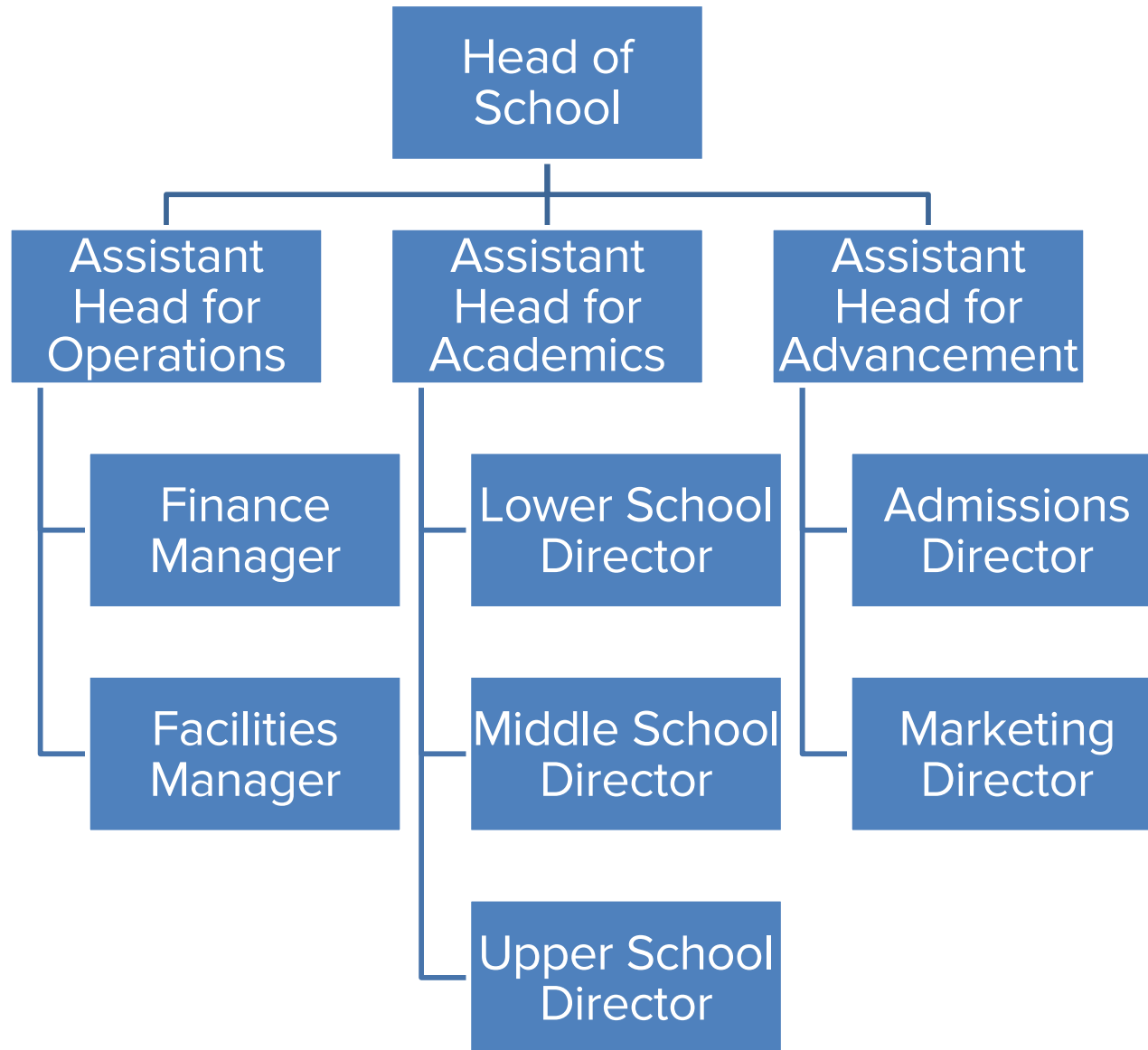
what you believe *your* role is in  
advancement at your school.

## In Groups of Three ...

1. Show your card to your partners and describe what you see.
2. Explain why you believe your picture represents your role in advancement at your school.
3. Consider (and discuss) whether there is overlap between your school's mission and your role in advancement.
4. You have six minutes total – 2 minutes per group member.

# Typical Administrative Structures

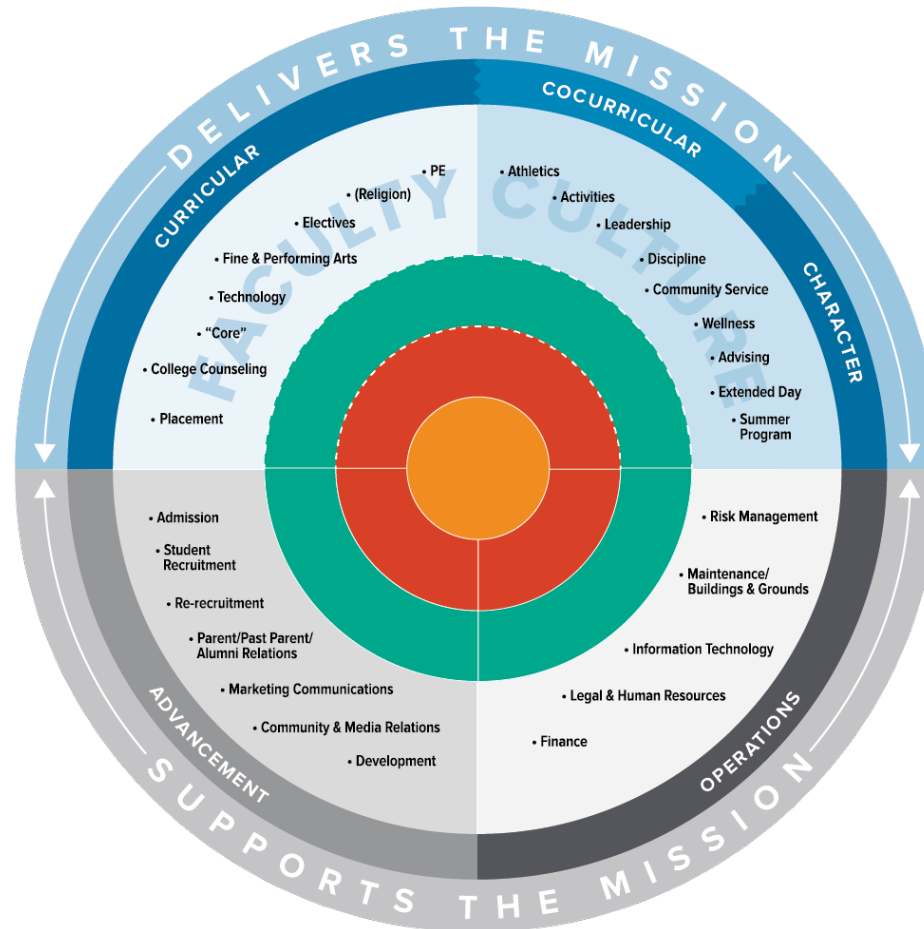




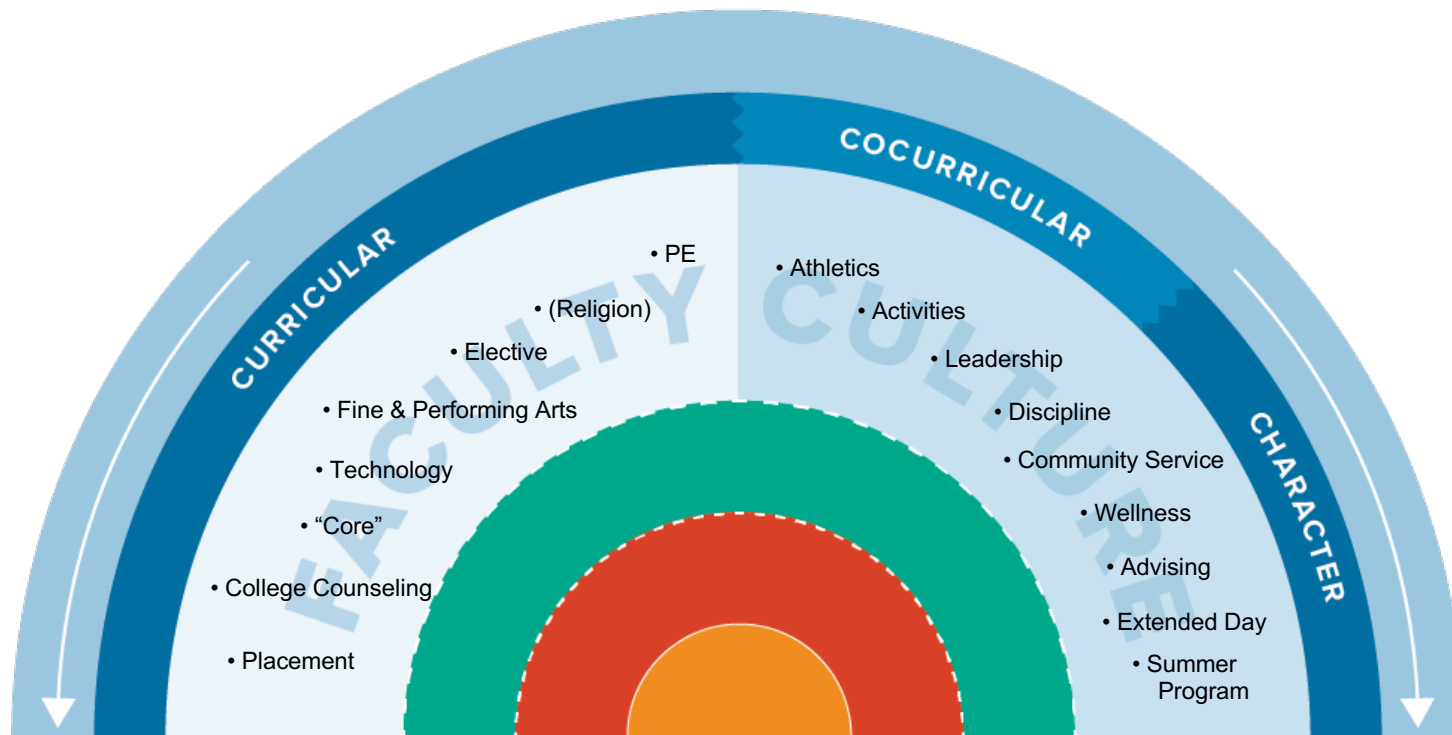




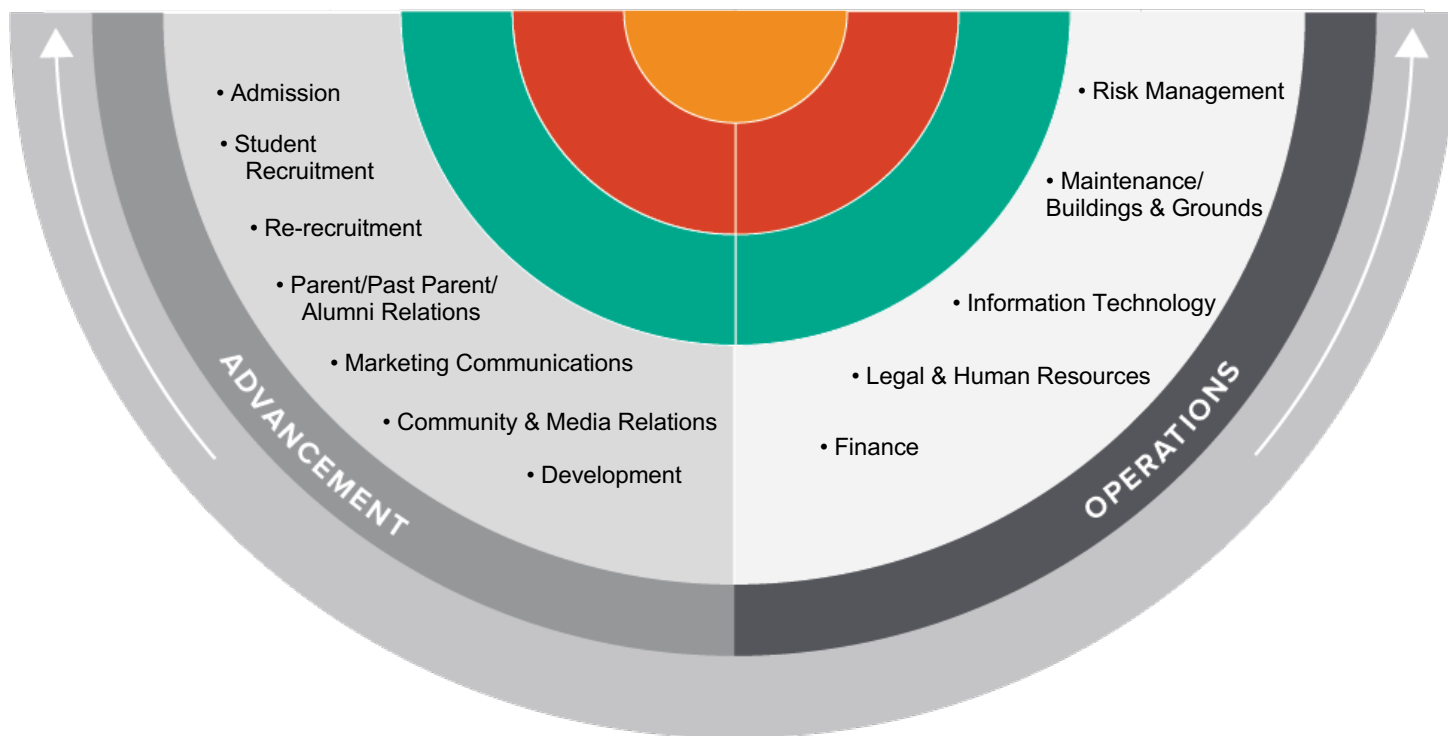
# The ISM Circle



## Upper Half

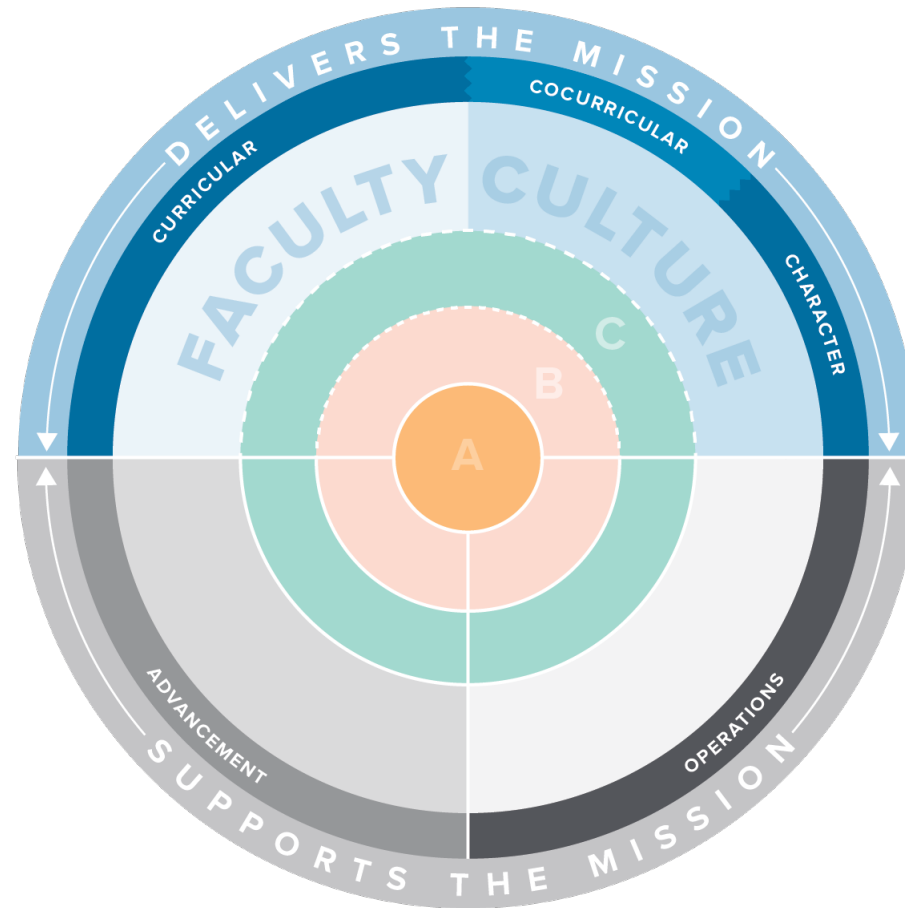


## Lower Half

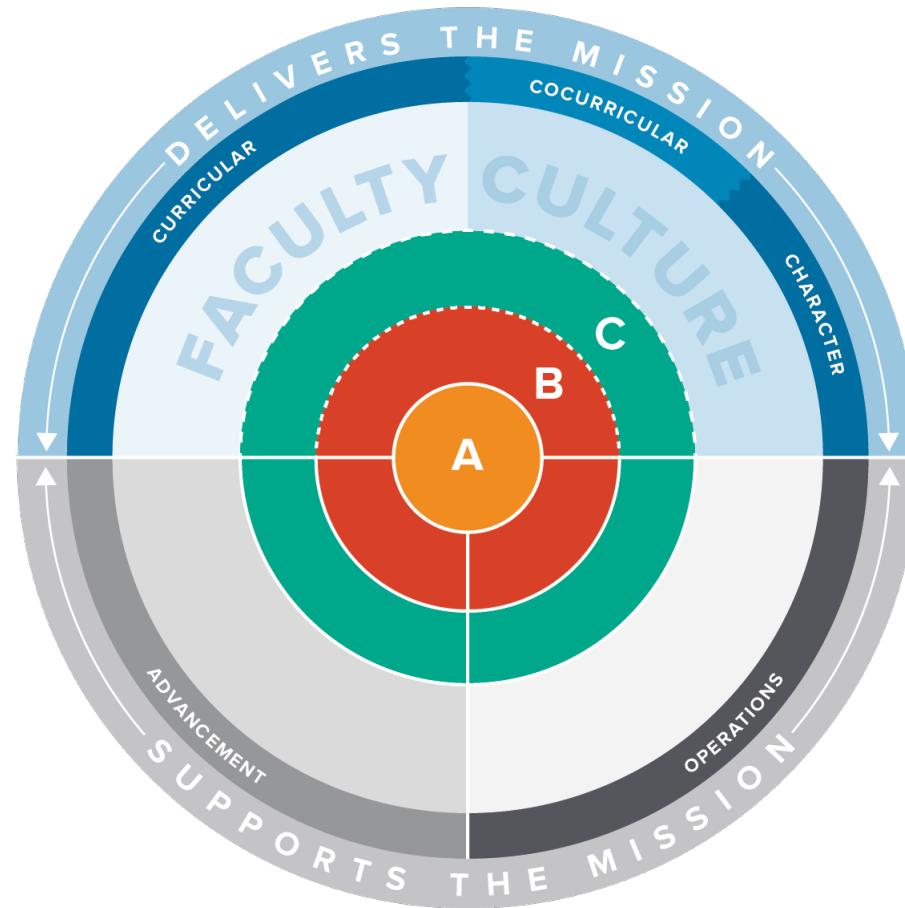




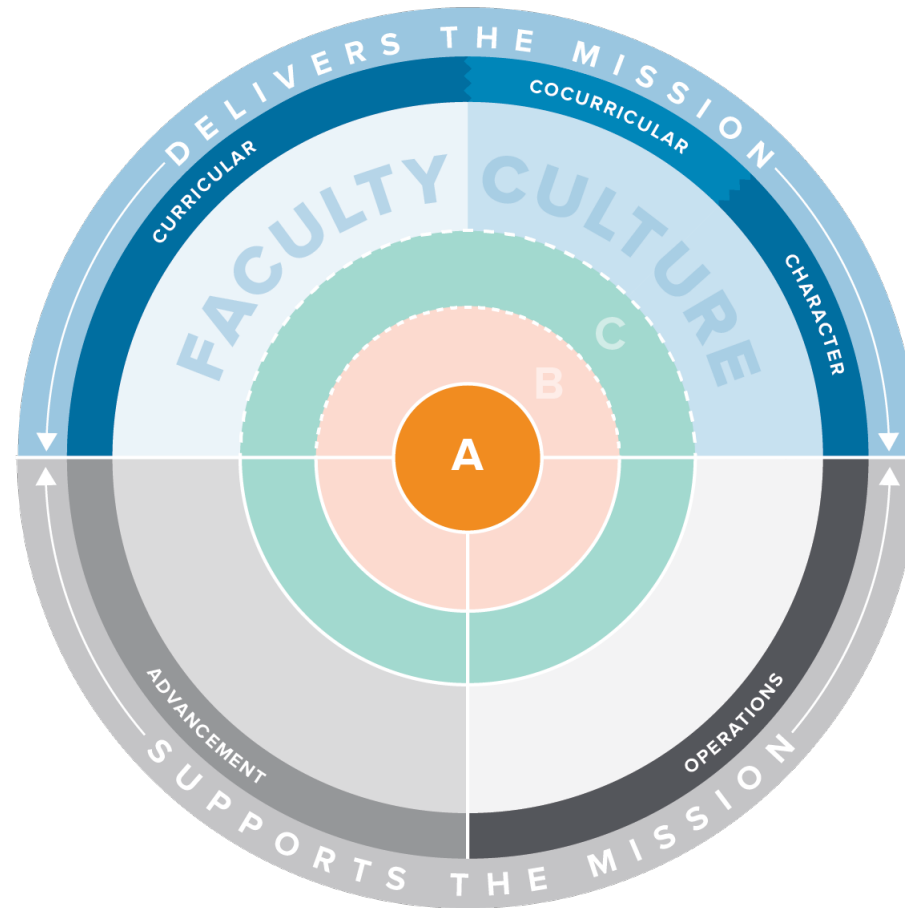
## The ISM Circle



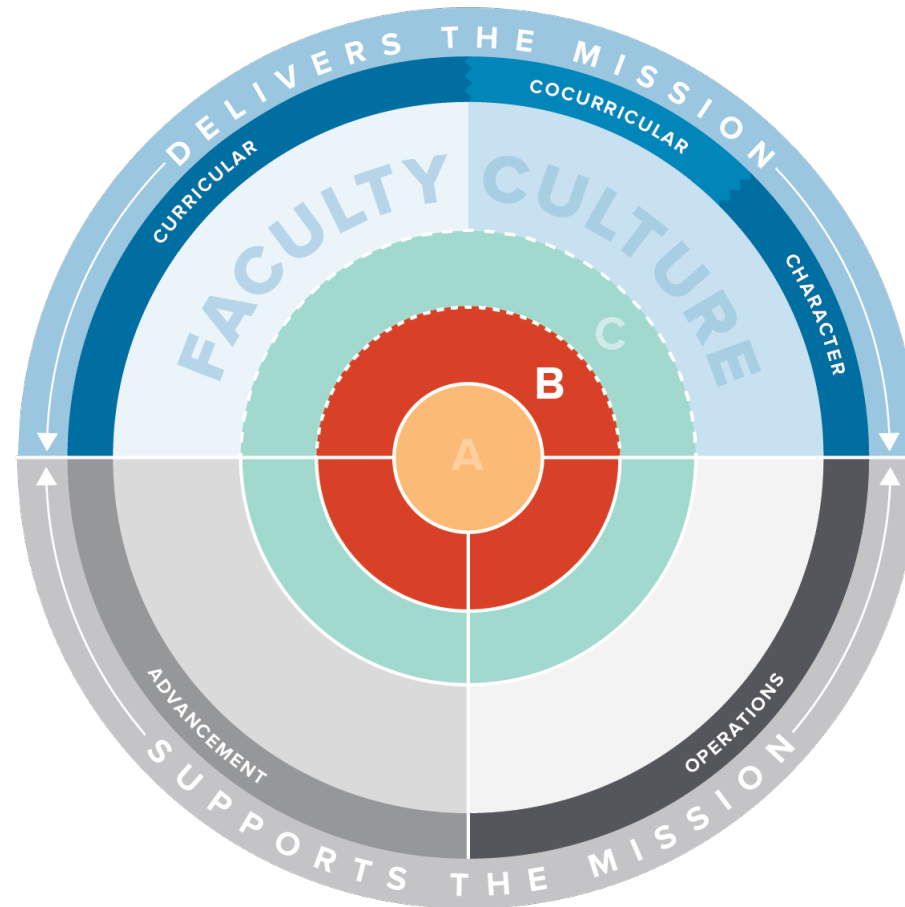
## The Rings



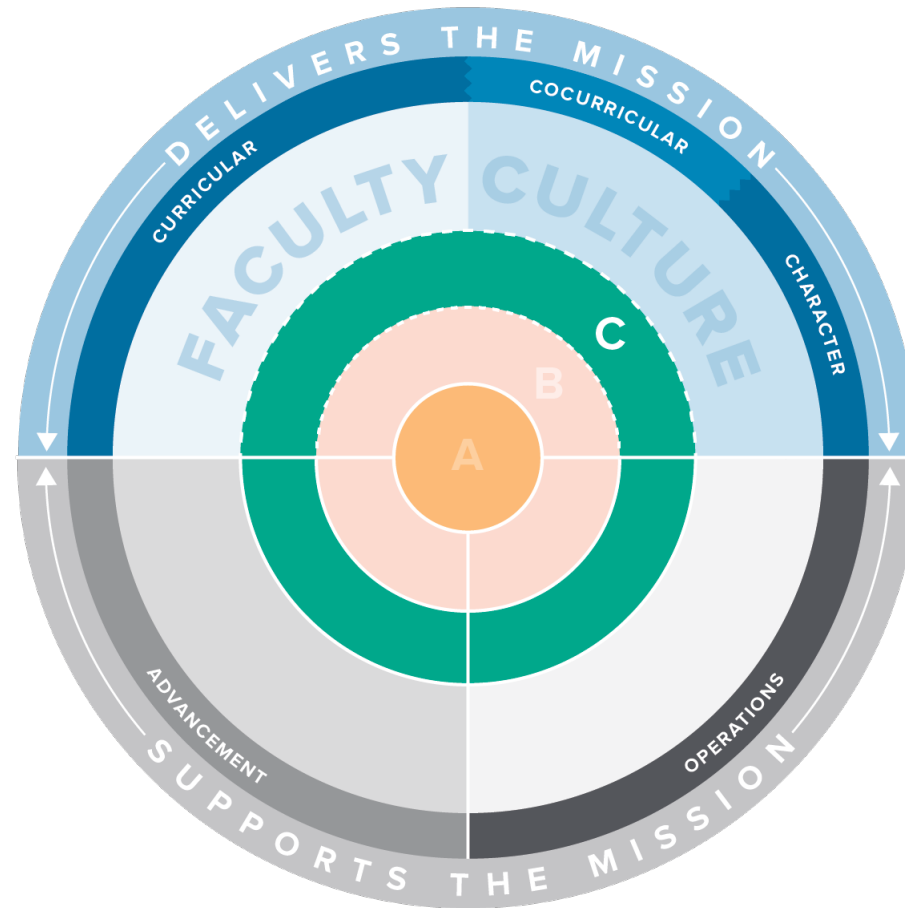
## A Ring



## B Ring

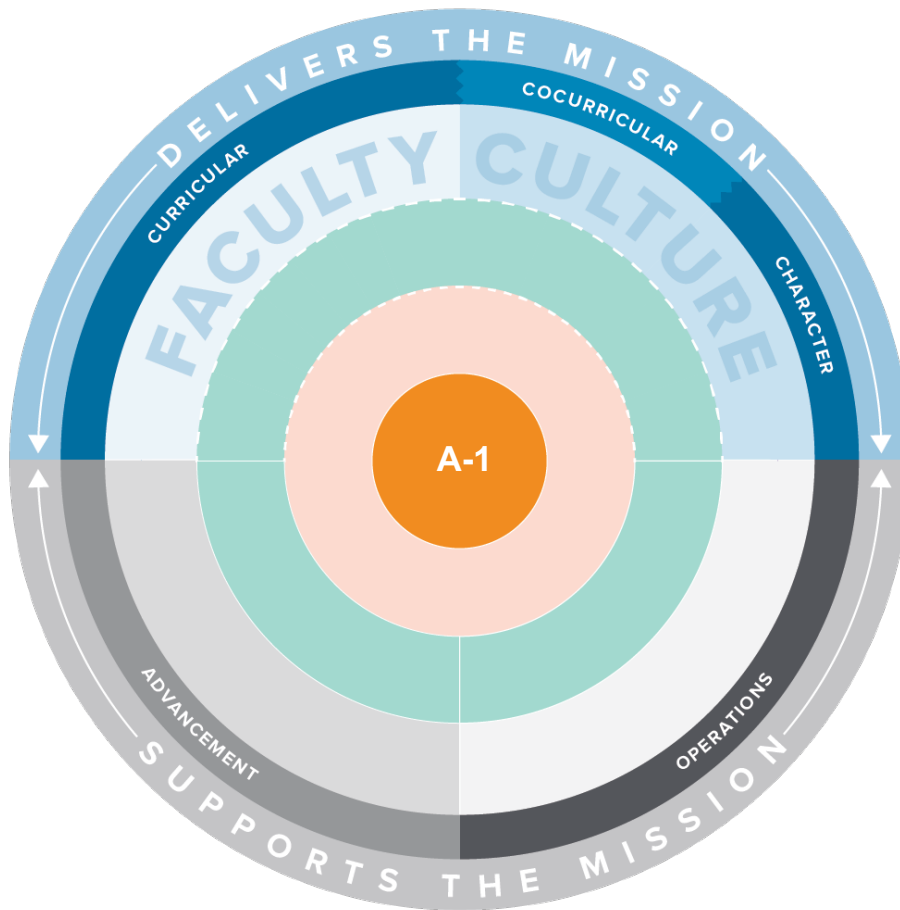


## C Rings

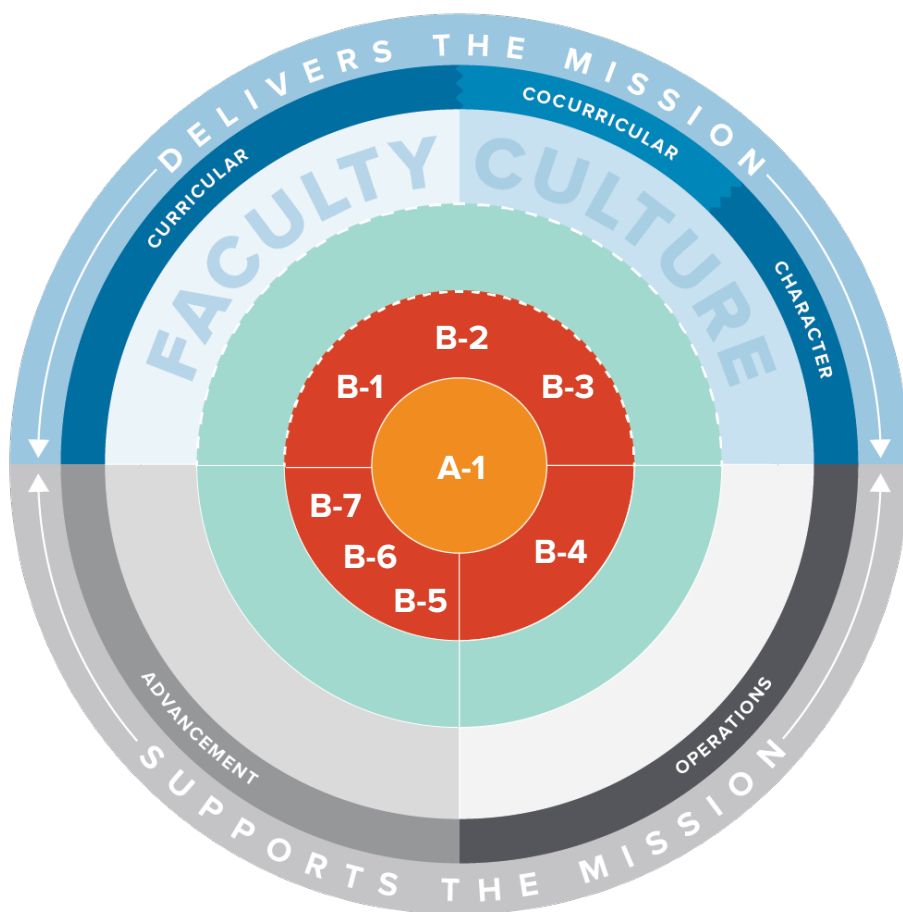


## Example School

A - 1 = School Head



## Example School



**A - 1 = School Head**

**B - 1 = Division Head**

**B - 2 = Division Head**

**B - 3 = Division Head**

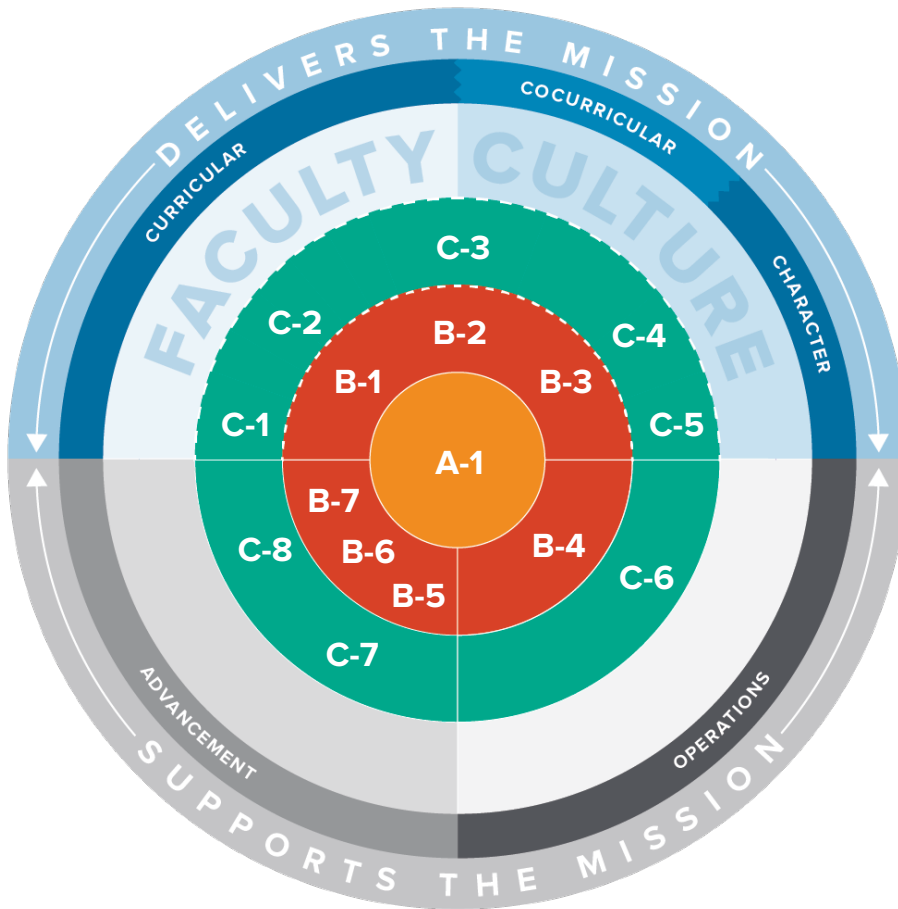
**B - 4 = Business Manager**

**B - 5 = Development Director**

**B - 6 = Marketing Communications Director**

**B - 7 = Admission Director**

## Example School



**A - 1 = School Head**

**B - 1 = Division Head**

**B - 2 = Division Head**

**B - 3 = Division Head**

**B - 4 = Business Manager**

**B - 5 = Development Director**

**B - 6 = Marketing Communications Director**

**B - 7 = Admission Director**

**C - 1 = College Counselor**

**C - 2 = Department Chairs**

**C - 3 = Athletics Director**

**C - 4 = Extended Day Director**

**C - 5 = Summer Program Director**

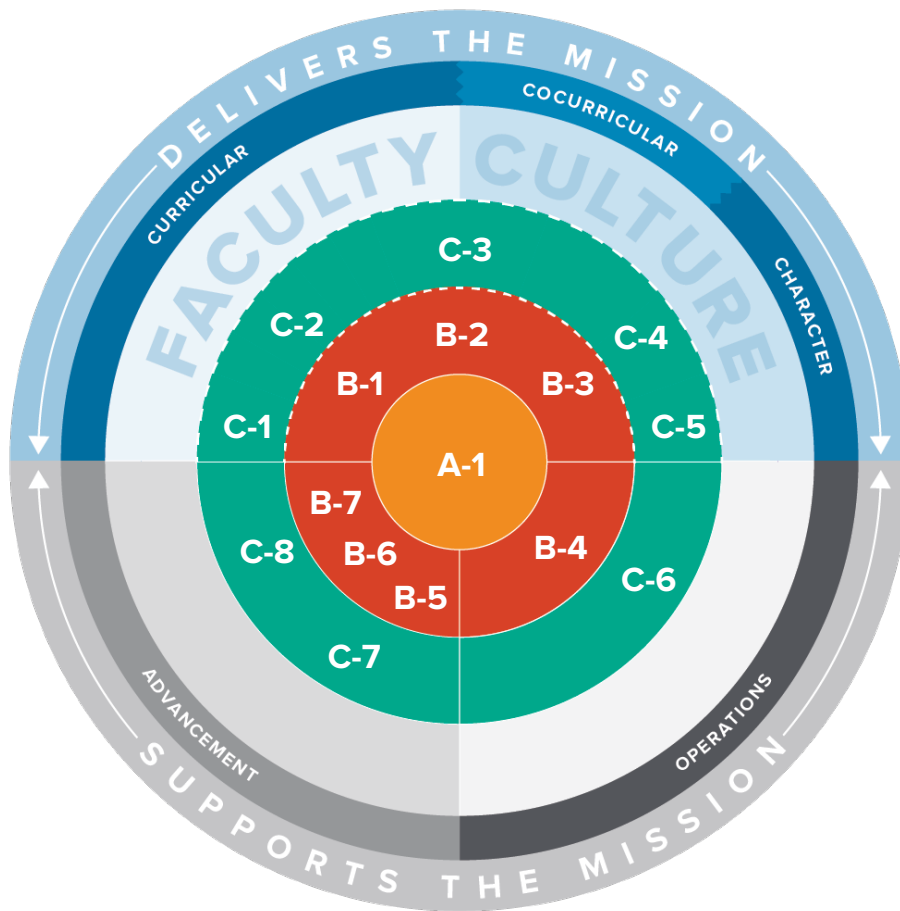
**C - 6 = Facilities Manager**

**C - 7 = Director of Data Services**

**C - 8 = Director of Annual Giving**



## Example School



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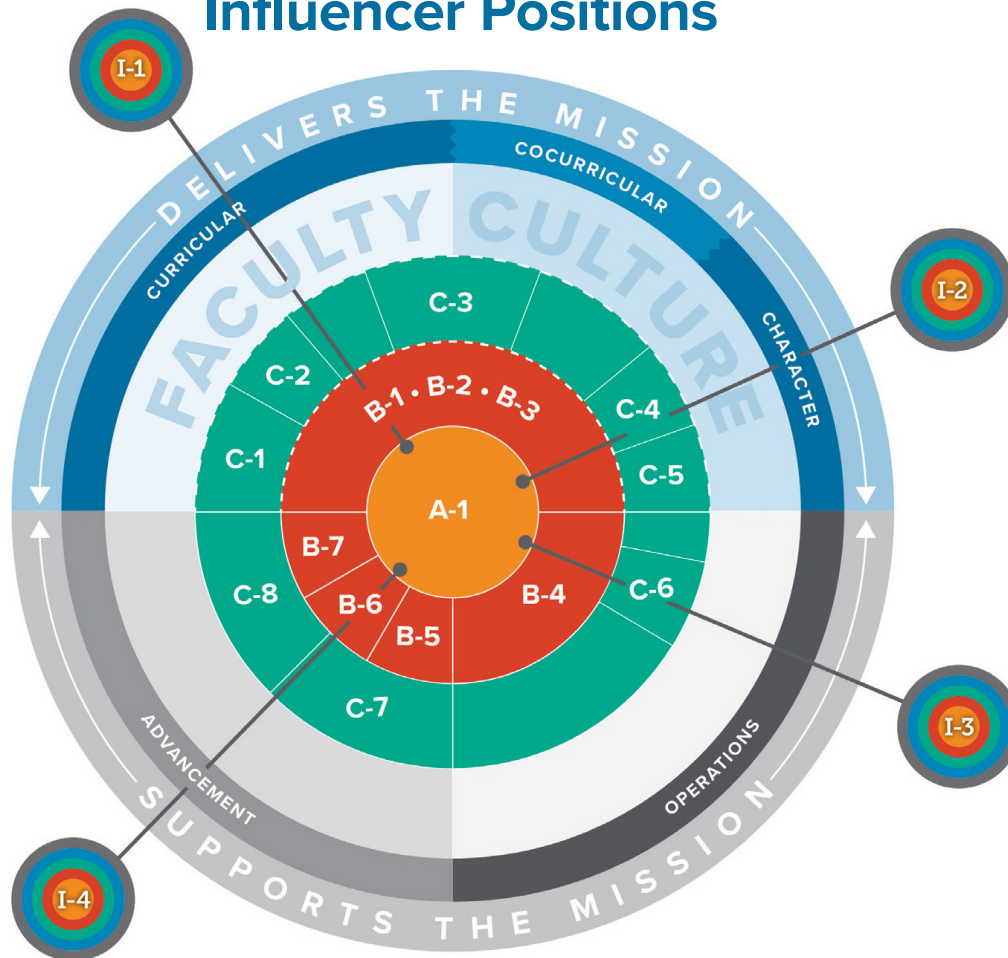
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## Influencer Positions



**A-1:** School Head

**B-1:** Division Head

**B-2:** Division Head

**B-3:** Division Head

**B-4:** Business Manager

**B-5:** Admission Director

**B-6:** Marketing Communications Director

**B-7:** Development Director

**C-1:** College Counselor

**C-2:** Department Chairs

**C-3:** Athletics Director

**C-4:** Extended Day Director

**C-5:** Summer Program Director

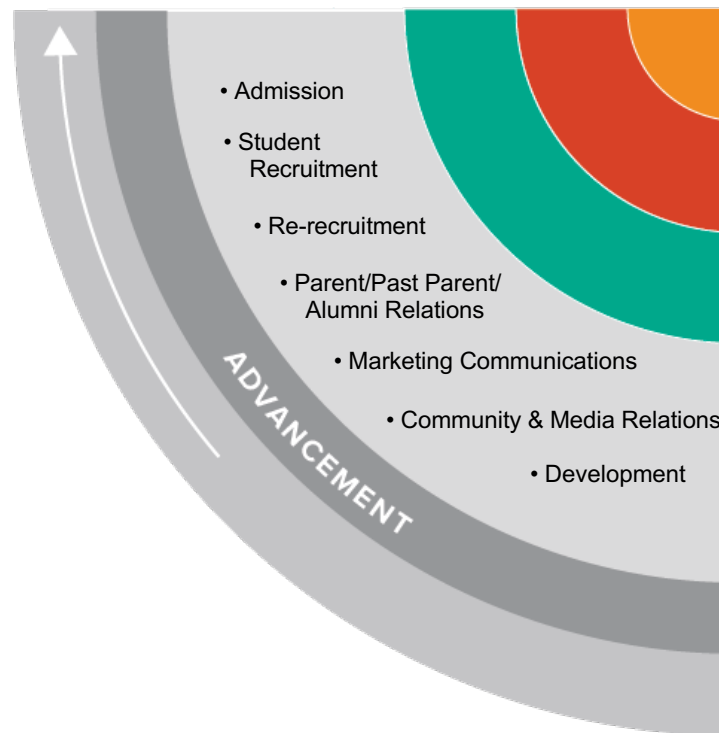
**C-6:** Facilities Manager

**C-7:** Director of Data Services

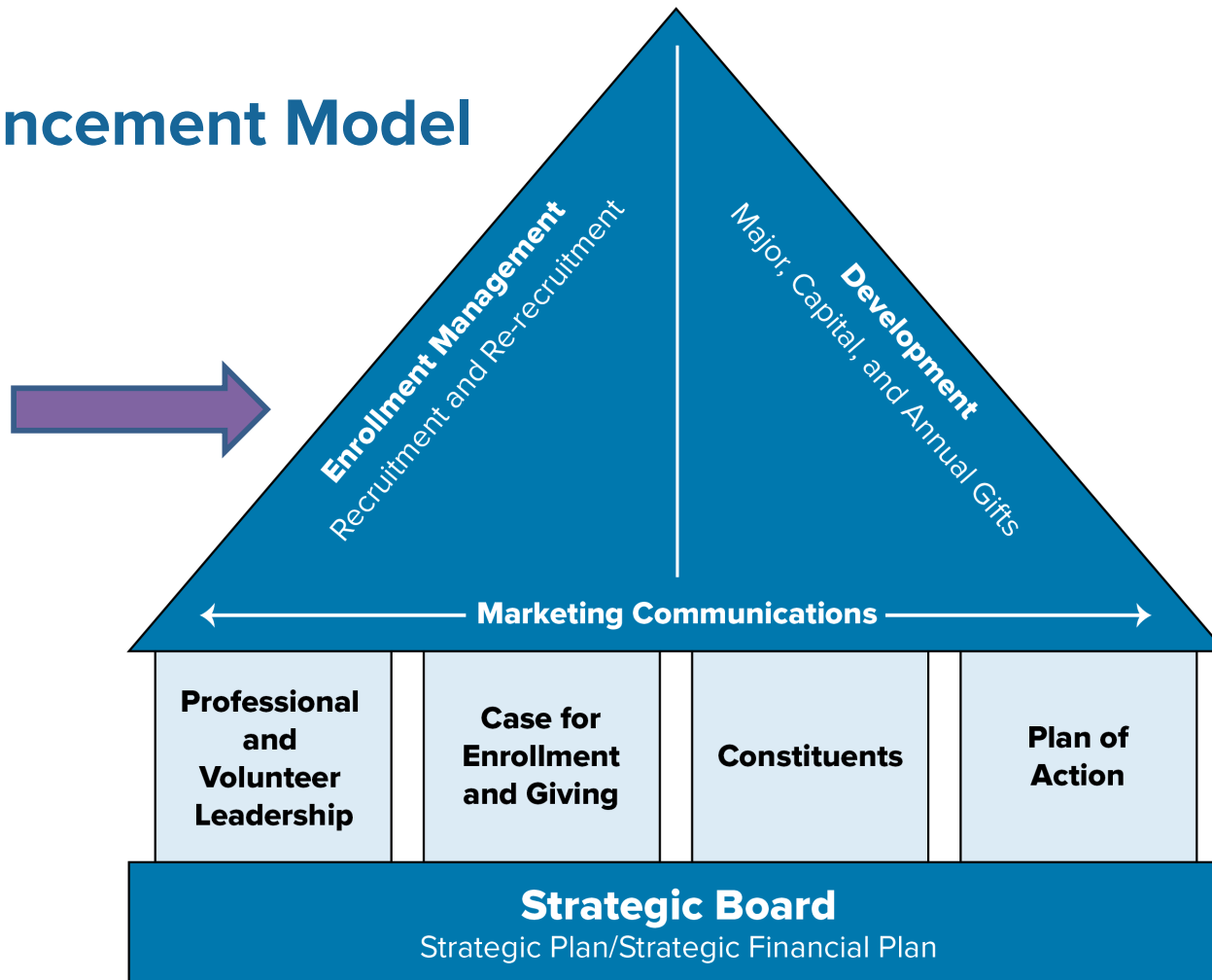
**C-8:** Director of Annual Giving

**I-(1-4):** Influencer positions  
(e.g., Director of Diversity,  
Equity, and Inclusion)

# Advancement Quadrant

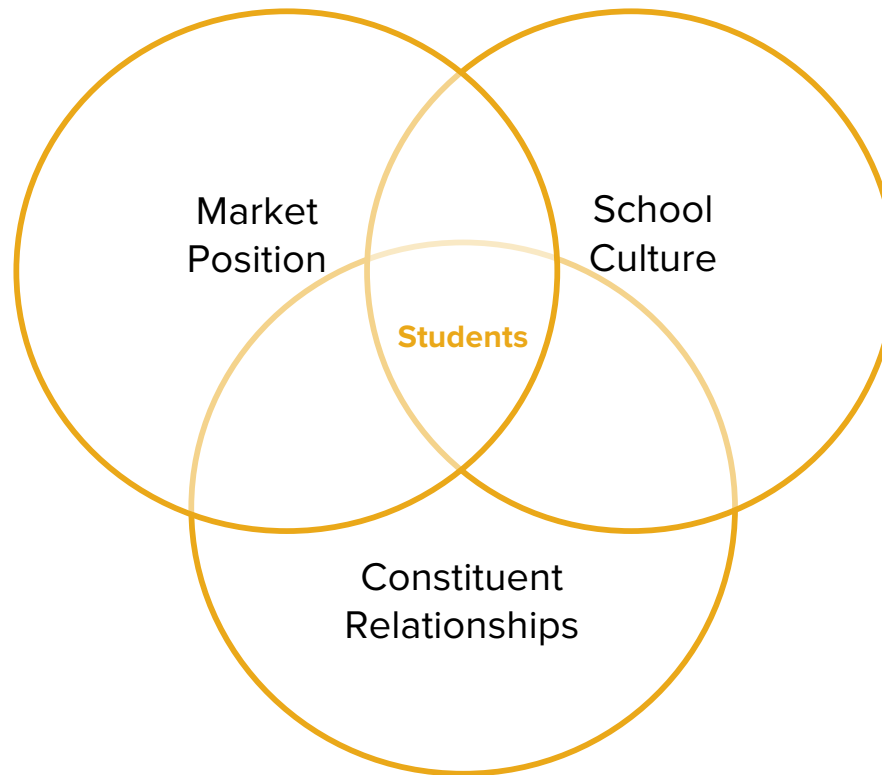


# ISM Advancement Model

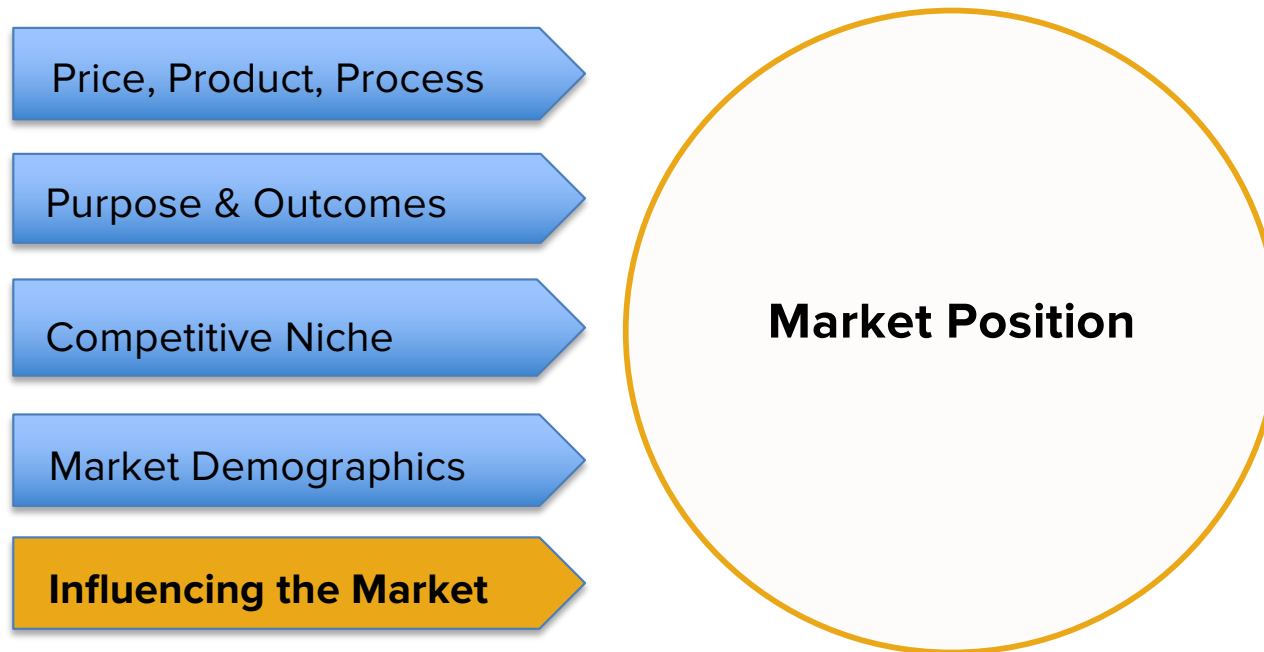


## Spheres of Greatest Influence

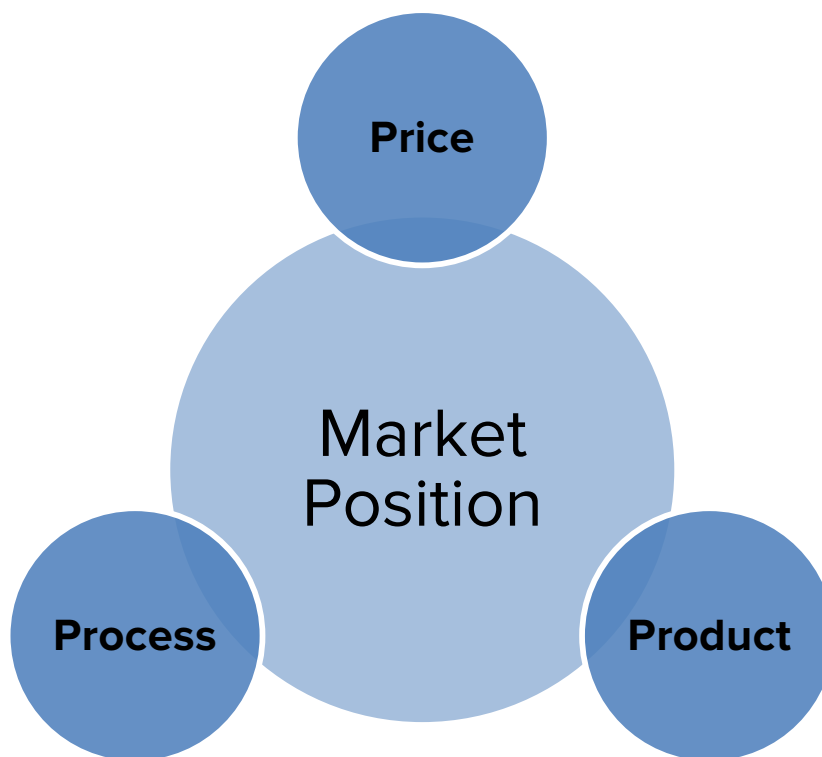
*Examine every aspect of your students' and parents' experience*



## Sphere 1: Market Position



# Taxonomy for Private-Independent Schools



## Price, Product, Process

- A price-value focus means that your primary (not your only) case for enrollment is your affordability.
- An academic product focus means that your primary (not our only) case for enrollment is your academic superiority.
- A process-individualization focus means your primary (not your only) case for enrollment is that you offer more programs at more levels than do your competitors.



Marketplace Focus	Price Accessibility	Academic Product	Individualization Process
Admission Selectivity	Values-based	Ability-based	Broad-based
Costs-to-Market	Low (\$15K or less)	High (\$25K or higher)	High (\$25K or higher)
Student-Staff Ratio	High	Mid-range	Low
Programmatic Focus	Targeted outcomes	Targeted outcomes	Breadth of outcomes
Outcome Characteristics	Best prepared for values-driven life	Best prepared for next academic level	Best prepared for creating one’s own path
Student/Faculty Ratio	16:1	10:1	8:1
Student/Staff Ratio	11.7:1	5.8:1	5.1:1

# Implications of Primary Marketplace Stance

**In Admission:** Ensures you are attracting the right students for the right reasons—and that you are not unnecessarily narrowing your recruitment funnel.

**In Development:** Ensures donors understand your philanthropic priorities—and how their gifts are directly linked to your student outcomes.

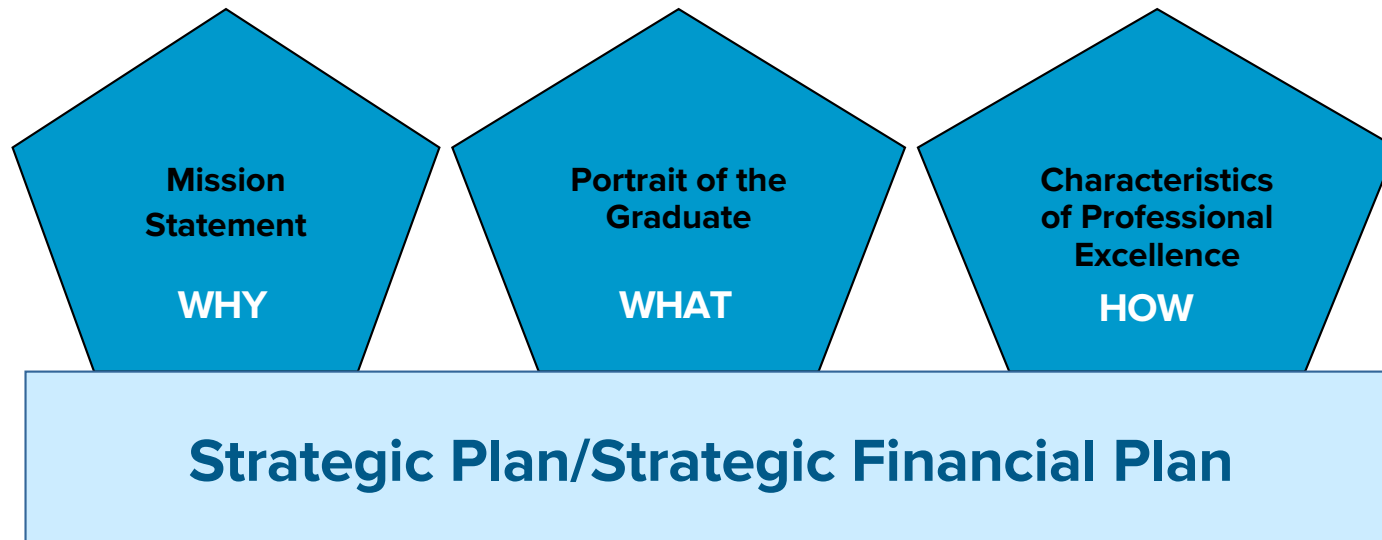
**In Marketing Communications:** Ensures clarity of your marketing messages—and serves as a roadmap for your validation communications.

**In the Academic Realm:** Ensures teaching and learning results in optimal student experiences—and **delivers** the student outcomes you promised (re-recruitment).

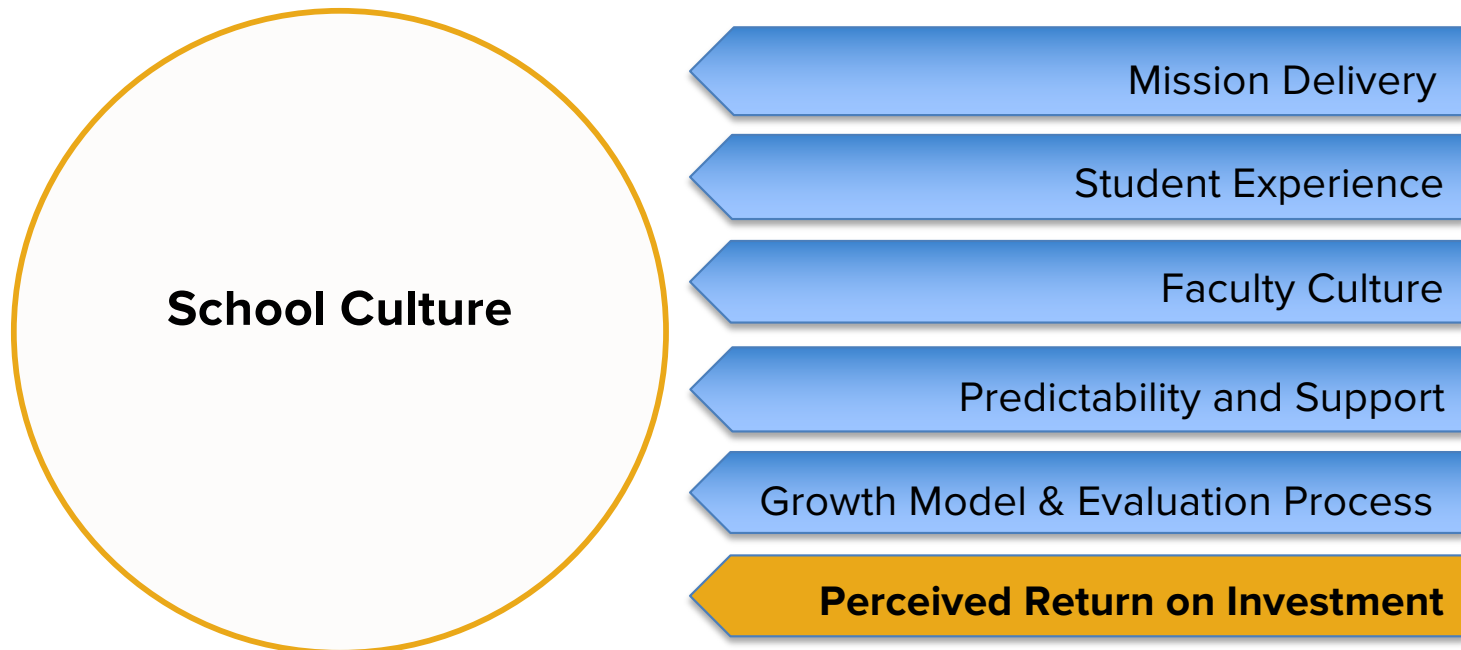
# **Your Turn – Price, Product, Process**

# Purpose & Outcome Statements

**Your Mission, Your Students, Your Faculty**



## Sphere 2: School Culture



## Sphere 3: Constituent Relationships

Anticipate their Needs

Mitigate Obstacles

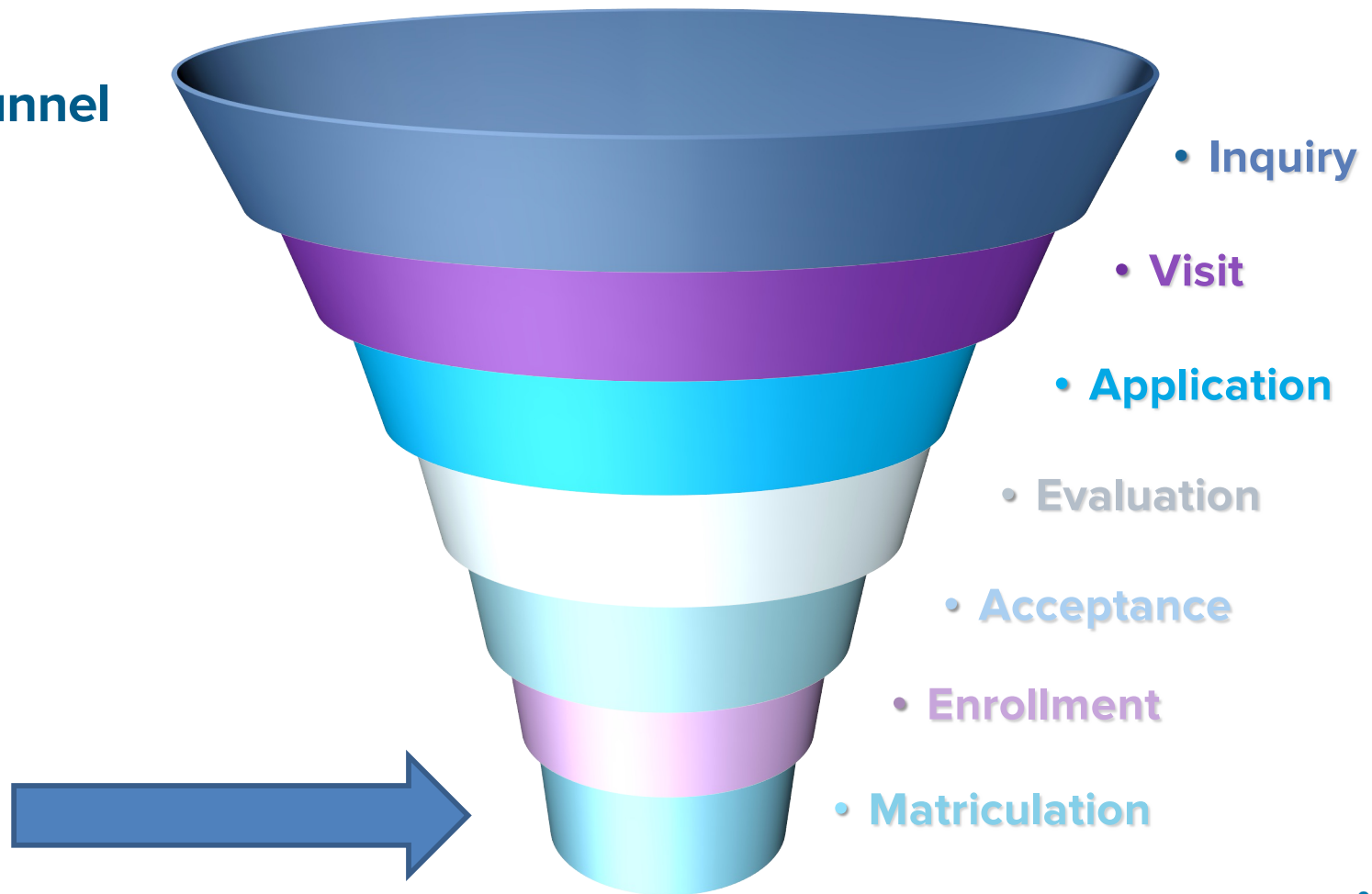
Take a Personalized Approach

Share Stories that “Prove It”

**Enhanced Relationships**

**Parent/Constituent  
Relationships**

## Admission Funnel



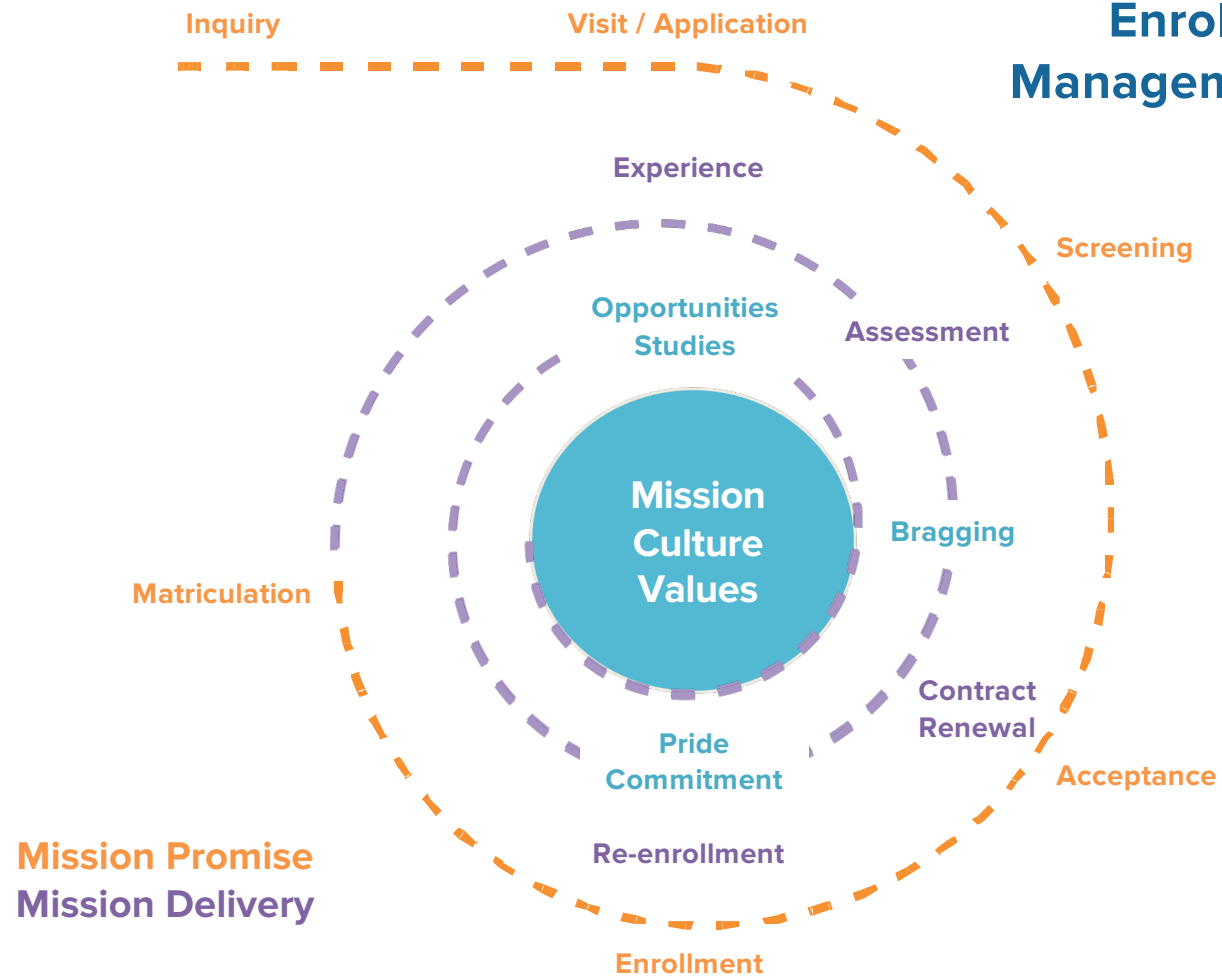


# What is Enrollment Management?

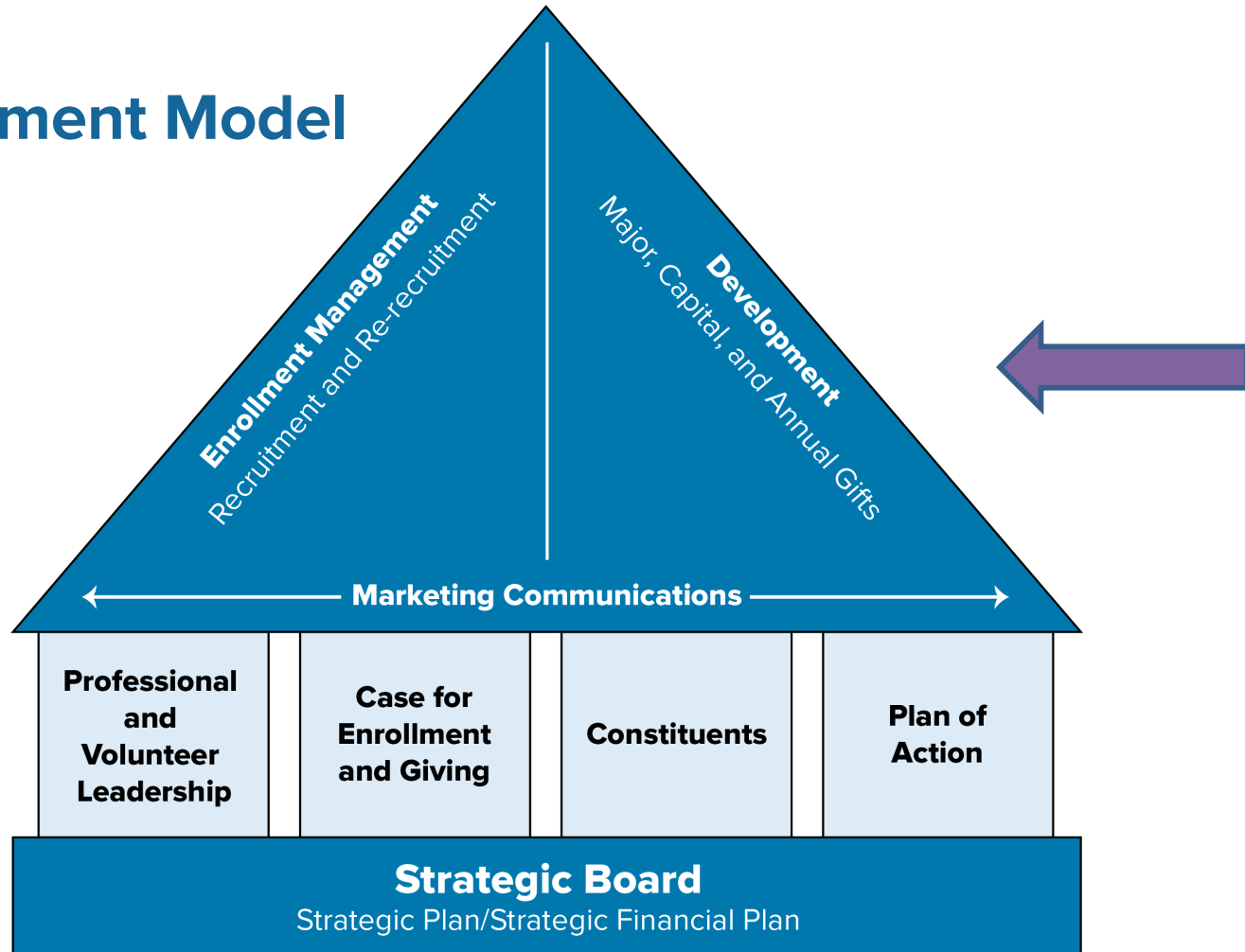
**... “a continuous set of strategies that enables your school to deepen the relationships it has with its constituents, bonding them ever more deeply and bringing them successively closer to your school’s mission, culture, and values.”**



# Enrollment Management Cycle



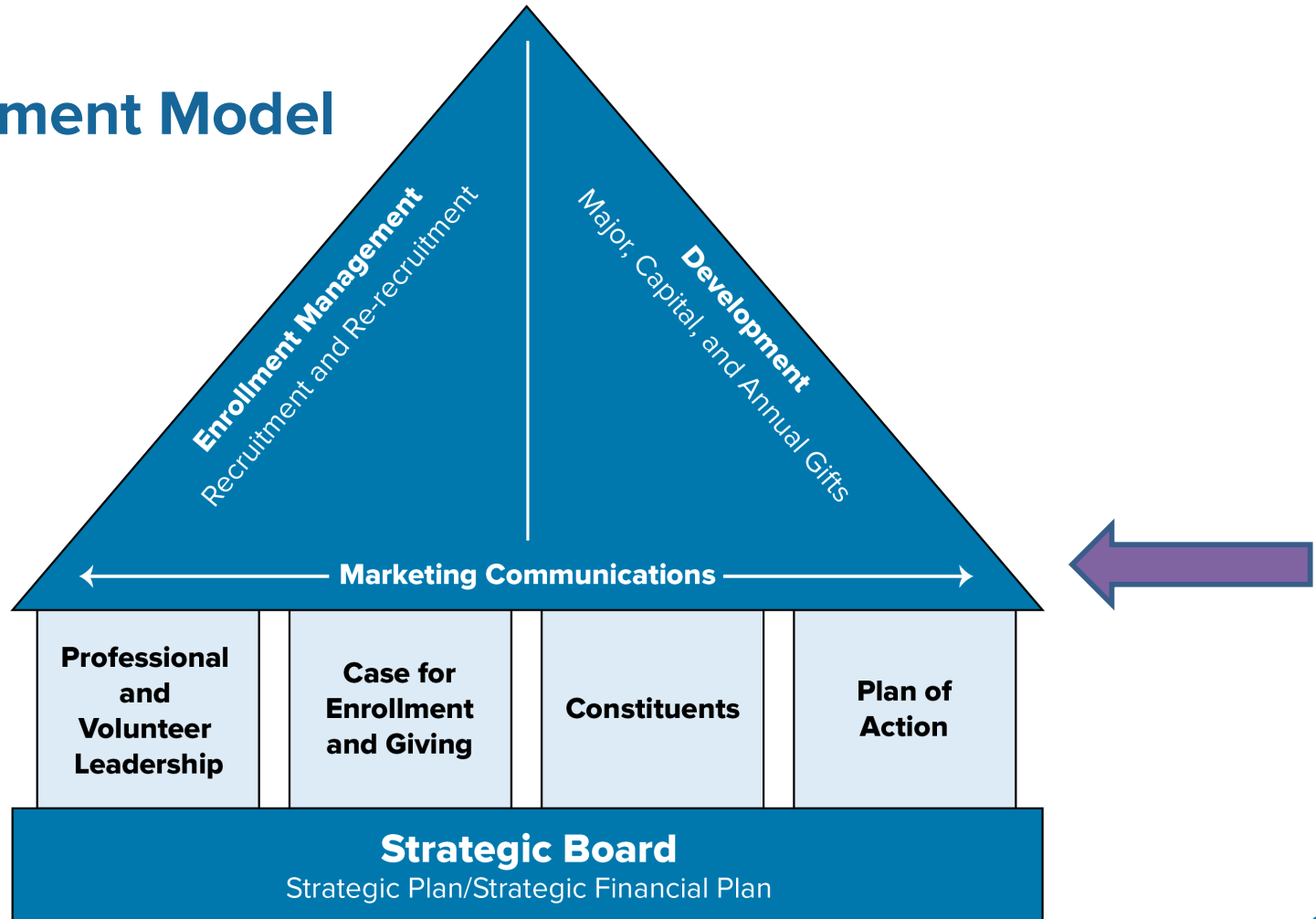
# ISM Advancement Model



# Donor Cycle



# ISM Advancement Model



## 20<sup>th</sup> Century Marketing

The school is the brand

Parent is a passive consumer

Parent is easily satisfied

Parent trusts authority

Admission Director is the frontline storyteller

Inquiry and application are key metrics

Marketing a product (school & curriculum)

Word-of-mouth drives initial inquiry

Of course they'll come, and they'll stay

One or no-one responsible for marketing

Internal marketing not critical

Schools comfortable with the status quo

## Today's Marketing

The student is the brand

Parent is an active consumer

Parent has high expectations

Parent mistrusts authority

Digital messaging is frontline storyteller

Re-enrollment is key metric

Marketing an experience

Word-of-mouth still drives initial inquiry

They may not come, they may not stay

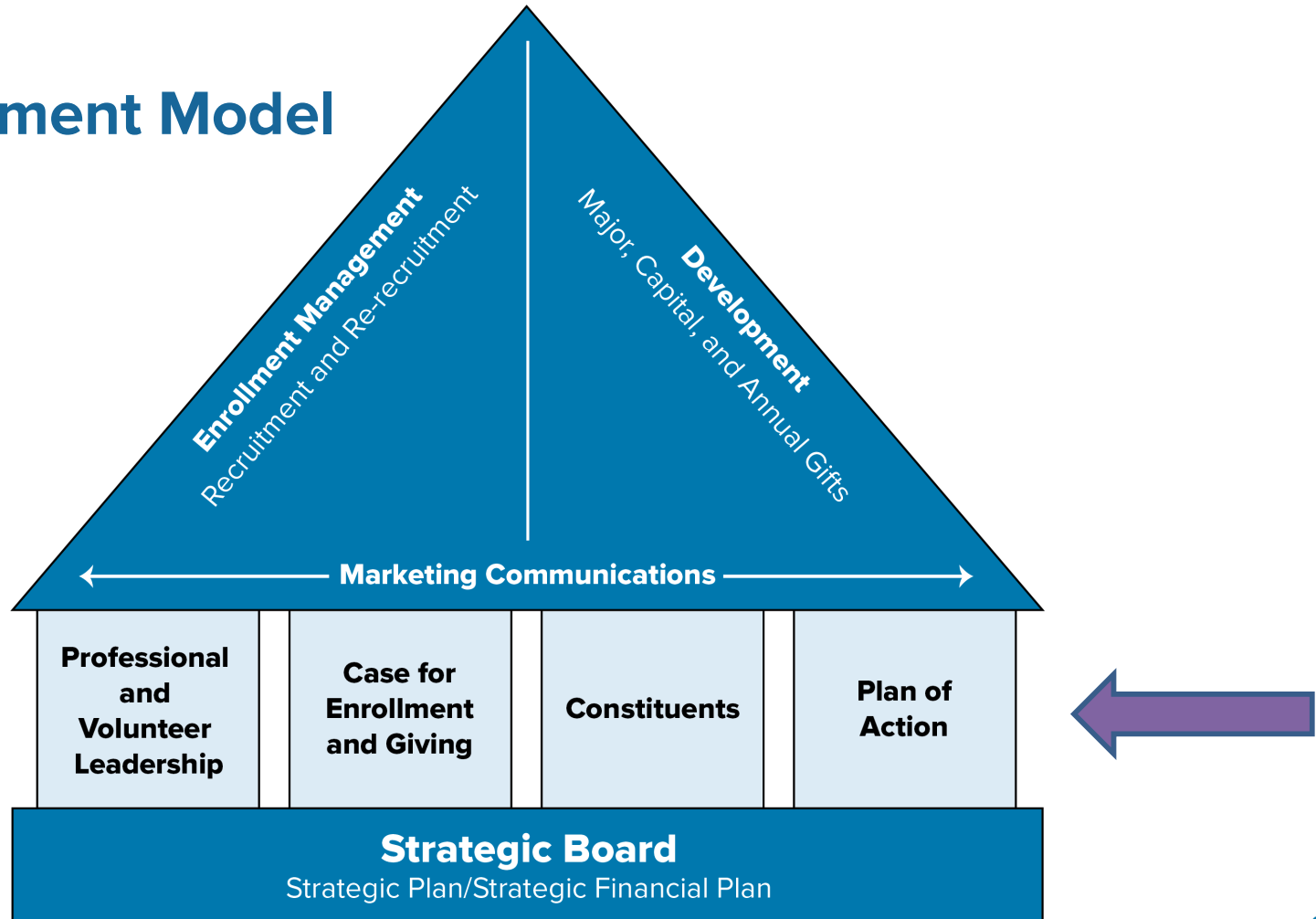
Everyone is responsible for marketing

Internal marketing critical

Status quo challenges value proposition

# Advancement Assessment

# ISM Advancement Model



# Advancement Core Values

01

We believe deeply in the mission of our school and are compelled to action.

02

We act ethically and legally.

03

Our Advancement Team creates, nurtures, and measures relationships with our school's diverse constituents.

04

Our Advancement Team delivers results.

05

We have a comprehensive advancement system in place governing all admission and enrollment management, marketing communications, and development efforts.

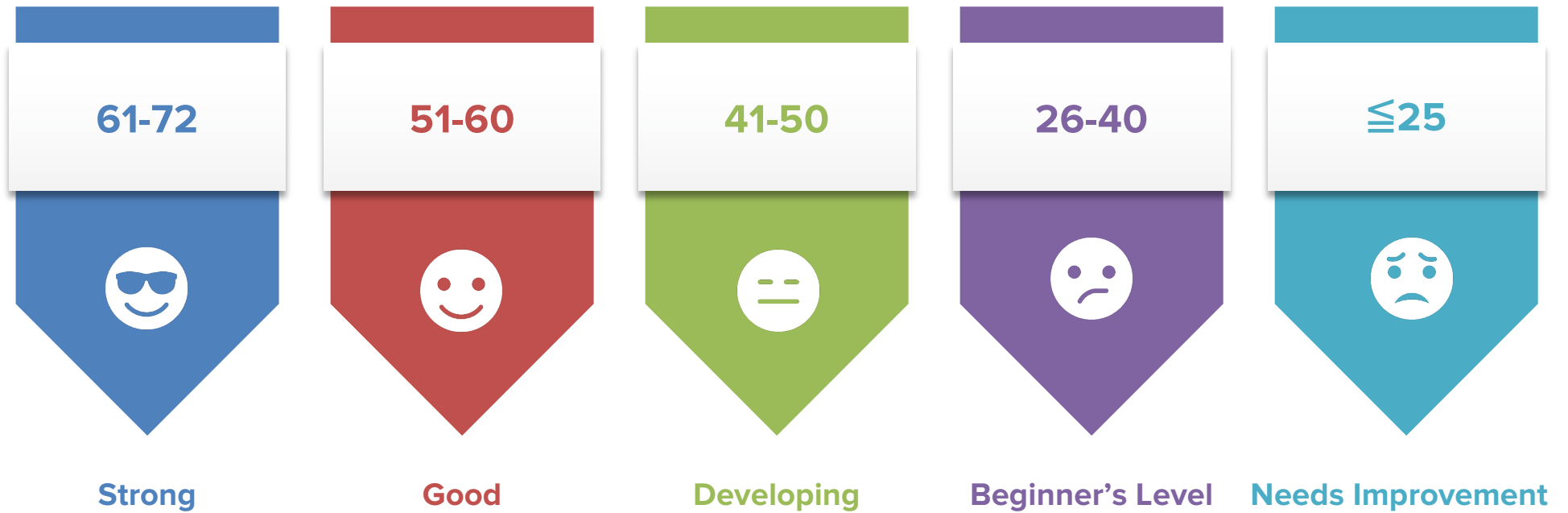
06

Our Advancement Team sustains a culture of individual and team professional growth and renewal.



**How Did You Do?**

# Scoring Scale

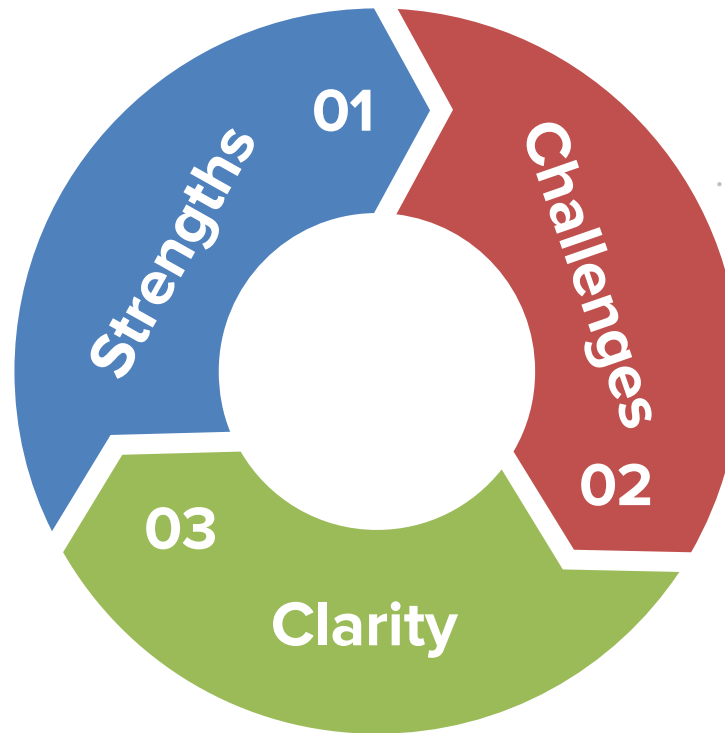


# Breakout Groups

What are your school's areas of strength?

What are some areas for improvement?

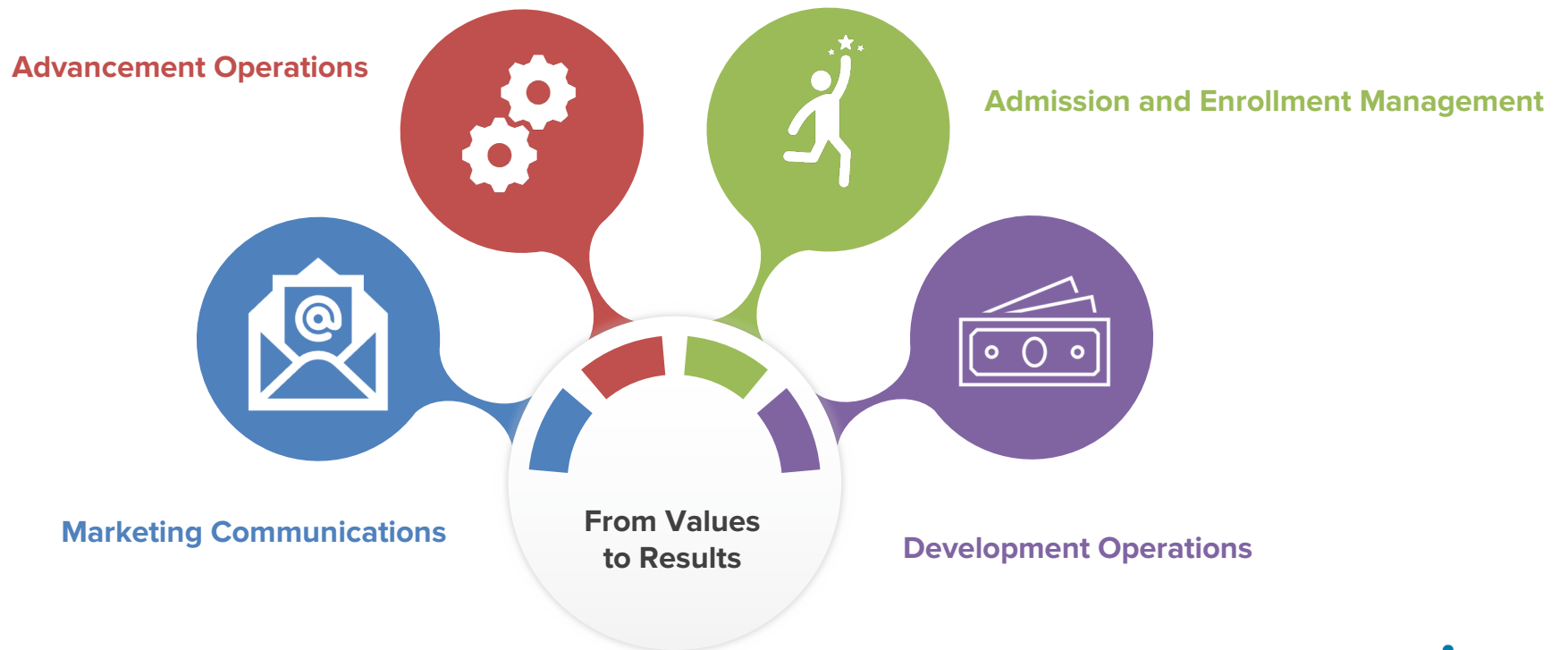
What points of clarity do you need about your school's advancement efforts?



## Back on Campus: Using the Assessment

1. Share the assessment with your Head of School and ask for their feedback on your results.
2. Ask to meet with your advancement team and share the results of your assessment.
3. Spend time discussing any “I don’t knows” or areas you gave low scores. This provides an opportunity for clarity and support.
4. Offer to provide an extra copy of the assessment if they would like to take it themselves.

# ISM Full Assessment Suite





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