“What Are The Top Issues Affecting Advancement Services?”

I posted the following question on the FUNDSVCS listserve on 1/22/2007: “What do you think are the top issues senior management needs to understand about your job, or Advancement Services? These might be your pet peeves, or your ongoing boss-education goals. I'm thinking of big-picture issues that would help with setting goals and expectations, recruitment and retention, keeping current with technology, working efficiently, stewarding donors and funds, working with other departments, and staying on the right side of the law.”

I received 46 responses. Thank you to Beatriz Adrianzen, Bonnie Alkire, Linda Bennett, Nancy Bryant, Tammi Burkhardt, Kim Davis, Holly Dombkowski, Tracy Eliott, Terry Garmon, Jessica German, Melissa Graves, Charlie Hunsaker, Elizabeth Johnson, Mary Kelly, Anita Lawson, Sharon Lonthair, Anita Lynn, Don Martin, James Minehart, Becky Myers, Judy Myers, Karl Otto, Amy Phillips, Christina Pulawski, Mike Reopell, Rick Rossland, Robert Saunders, Catherine Seebald, Vicky Shaffer, Kathy Stuber, Carolyn Veltre, Criss Wall, Jo Ward, Beth Wiley, Ellen Woolley, and Lisa Ziska-Marchand.

I have roughly organized the responses by the themes that emerged (though many responses covered multiple themes). I have done only minimal editing and spell-checking on them. The themes were:

Gift Processing and Data Entry

Gift Processing is way more than data entry. It requires working with and understanding the database; the bank; the Finance Office; post office standards; our business rules; IRS regulations; our funds; our appeal codes; our campaign goals; our online giving system; our fundraisers, deans, and faculty; and our donors.

Have you any suggestions on how to get other disciplines to appropriately recognize the versatility of GP and the responsibility that GP shoulders to keep the entire institution out of trouble? The “just data entry” mindset is a hard nut to crack with most folks!

Our senior management and our foundation believe that all we need are entry-level data folks to “fat finger” gifts in as they like to say. We have been accused recently of not working as efficiently as possible when we are still saddled with writing up manual bank deposits and not using a credit card vendor to process cc gifts but instead downloading encrypted files, decrypting, printing then running them through the machine ourselves using manual input--all because our contract with an Alaska bank means we are technologically limited. Talk about inefficiency!

Other issues are the ongoing data updates and maintenance projects we handle on a regular basis which means we can't simply drop everything and “fit in” a major data project such as downloading parents from our admissions applications and inputting them into our advancement system (along w/ all the identification and de-duplication efforts that entails). Our database folks (all two of them) are much more than data entry people too!

Another would be getting senior management to understand just because they “want” to count something as a gift doesn't mean they can. Example here is corporate sponsorships for athletics: most of those are countable (at least the part that aren't benefits) provided athletics isn't giving out “hidden” benefits that would negate the gift definition and is limiting the “advertising” identified in the corporate sponsorship contract to the countable definition of advertising; that is, no qualitative or comparison information. The athletics associate director is not part of the development team so may not understand the differences and that it's up to HIM to limit what they promise or deliver to a sponsor. And of course I've got Development on my other side saying “But yes it's all countable so let's make sure athletics sends it all to you for processing.”

Sometimes when I have this stuff running through my head all at once, I'm thinking “they keep referring to this as 'data entry'“, which sounds a bit menial compared to what we really do!

I would add the often-overlooked partner of Gift Processing, the foundation upon which all Advancement functions depend on but often neglect to consider - the arguably more complex, Bio Records Staff. They need to know most of what you pointed out for Gift, as well as Postal Mailing Standards, Zip codes, Area Codes, Time Zones, Awards and Honors, advanced degrees, majors, relationships, information disclosure guidelines, job-function categories, industry categories, relationships, yada, yada, yada.

We have found that we can train a new gift person more quickly than a new bio person. Just the procedure alone for marking an entity deceased involves countless screens - yet managers often mistake this as just changing the status code. I see both sides of Records Administration (gift and bio) as the unsung heroes of Institutional Advancement.

Gift processors do not want to grow up to be development officers. There is a superiority aura that seems to exist in the fundraising offices and while gift processors should be respected in what they do, they're cool with the whole "back office, no schmoozing, nobody knows my name" position. Most of my gift processors are introverted people that absolutely love data entry, are great at it, and truly enjoy their jobs!

Reporting, Analysis, Counting, Output, Data Quality

Please add staff report writer to your list. I do believe that these (back room) positions are seldom given the attention they deserve from upper management, plus it's next to impossible to move up the ladder because it's too difficult to find replacements for us!

One of my pet peeves has to do with requests for invitation lists, reports, etc. for which not enough thought has been given. I am forever having to redo these things (sometimes multiple times) because seeing the list or report makes them think of something else they want, or something they don't want. I would like to see more needs assessment taking place before the list or report is requested. That should involve the person creating the list or report, so that there is a clear understanding before the work begins to produce the requested item.

I'm not sure how eloquent this is, but my life is much easier when my boss understands that data requests aren't accomplished simply by pressing a button on the computer. A boss who "gets" the need for lead-time and respects the amount of programming needed for certain reports is valuable, particularly when there may be others in the department/university who don't understand that.

It is also good to have someone on board who understands why it is important to keep software current. It's not always the glamorous thing to do or spend money on, but it is vital to providing the best service we can.

One more: Folks who don't know how to ask for the data they want. "Give me a list of people who are donors." And then they get a little frustrated with me when I ask them a million questions. Donors this year, or lifetime? Just folks with money in, or do you want pledges too? Just to a certain fund, or overall? What data do you need to see on these people?

Another comment on reports ~ often they think it's the database's fault (or ours!) that it's not simple to get what they want. I can't tell you how many times I'm asked for something like, “top donors.” As in “I want a list of all our top donors.” Okaaaaaaaay... sure! Do you mean $1,000 and up? $50,000 and up? Within a single fiscal year or cumulatively over a range of years? Over a lifetime? Including or excluding non-cash gifts? Including or excluding soft credit? I start asking the questions I need to do my job and I get, “Why is Banner so COMPLICATED?” It's not Banner people, it's the nature of the data!

Here's my pet peeve: The idea that data can come out of a database magically.
Just because I say “yes, I can get that for you,” does not mean I can do it in three minutes.

Likewise, I cannot get anything out of the database ... that I didn't put in! The database doesn't automatically “know” things. I have to tell it.

(I want to state for the record that I do not have these problems at my current place of employment ... these are very very vivid memories). :) :)

I would like to add: writing a custom report multiple times because the DO/requestor did not think through what they wanted and/or did not communicate that to the report writer. Incredible waste of time. Also, they have a real aversion to checking out the vendor's canned reports before they request a custom report. At my last AS office, we even copied the report manuals and provided them with copies, which they undoubtedly never cracked open. It should not be up to the report writer to try and determine if there is already a canned report that would satisfy the requestor's needs.

Also, the general unwillingness of development officers to learn a database different than the one they had at their previous employer's. Setting up training sessions with them and their assistants is an ordeal that rarely has a fruitful outcome.

I'd like to add a new item to the list though. It has to do with Capital Campaign counting. This is less of an issue for me today than it was a few years ago, but I've spoken with others over the years who have encountered the same issue and I'd hate for it to NOT make your list unless you have gotten a full 10 that are more relevant.

It is pressure and sometimes insistence on counting monies in campaign totals that should NOT be counted based on our CASE Campaign Reporting Standards. I have even known of instances where campaign consultants have supported counting these gifts. When I was new to the profession, I was told that, “yes, those are the official reporting standards, but in reality, most other institutions count “x” and/or “y”, so if we don't, we are putting ourselves at a disadvantage.”

Things have changed pretty dramatically (for me, anyway) along these lines in the past few years, but I still have to “do battle” occasionally, and it is usually with an administrator who came from another institution where “x” or “y” was done with no questions asked.

I know that John Taylor and others have been working to more clearly define the standards for accurate comparisons between institutions and have been pushing to bring about a certification process, so we should be headed toward a time when this is less of an issue, but I do still struggle with the ethics of campaign counting at times.

I couldn't agree more about knowing and understanding the data that we collect and use. Data definitions are critical and knowing how each of us defines fields and values, especially as we base decisions, allocate resources, and plan using our data, is all-important. Same is true when a vendor gives us data back in a prospect screening project, for example.

Regulations

I think many have hit the top points well -- gift processing, data entry, keeping up with technology and skill sets. Here's another that dramatically impacts my group and would fall into a top ten for me, not sure if it is the case with others. Aside from the constant challenge of ensuring we're in compliance with IRS, Finance, FASB, CASE, etc., our institute is constantly creating new policies and internal controls.

Every time we incorporate the process of adhering to the internal controls, it chips away at our core function leaving less time to do our jobs. We absorb all of this in Services in order to not burden any front line directors with these extra duties. When budget hearing time comes around, it's really tough to make a compelling case for operational positions because many divisions are in a similar place.

Training

I have to agree with everything that has been said in response, and I do have one item to add that hasn't been mentioned. Before I do so, let me make a couple of statements: 1) Before I was a software consultant, I was a fundraising executive for over 20 years -- I was -- “one of them!” However, I was also always in a small enough shop that I was directly involved in every aspect of services, short of personally entering gifts; 2)

And...though I now work for a software vendor that obviously provides training, my observations that follow re: training are not based on looking for more consulting dollars. Rather, they are the result of personal experience in two institutions where NO ONE on the Advancement, IT, or Business Office staffs had any vendor-delivered training on the product that they were supposed to use to make all the magic happen. As a consultant, I have also had clients for whom I was the FIRST vendor representative to provide training for them and that was 5 or more years, since their implementation.

TRAINING, TRAINING, TRAINING! What is the use of spending thousands -- hundreds of thousands in some cases -- for software and deciding to cut corners by not contracting for adequate/thorough training for the entire staff whose every day responsibilities depend on their optimal use of that software?! What's the downside of not providing it? Staff frustration/exasperation; inefficiency in more ways than I can list; failure to achieve the highest level of data integrity; sub-standard reporting; waste of dollars spent for the "top-rung" software; complaints and disrespect of their advancement staff by the same people who made the decision to "save a penny" in the first place!

I am all for training, believe me. It would help. But only if those being trained also saw the benefit. It is sometimes frustrating when people say things like "I don't need to know that because someone else handles that", and the like. It is hard to get management on board as well because well... sometimes they are the ones saying it.

I am not talking about cross- training - that's a whole other issue. I am talking about simple understanding of the gift handling process so that you, as a development officer or senior manager, can be helpful to the process and not an impediment to the process.

Asking me "if the receipts for an event ticket purchase can go out without the ugly legal language at the bottom that takes away from the lovely thank you we are trying to convey" - is an IMPEDIMENT to the process. Asking me why it takes so long to enter 15 stock gifts when half of the information is missing (like donor names!) is an IMPEDIMENT to the process

Senior management needs to support this kind of training and not be the ones who actually need the training.

You're right about that -- especially the "Senior management needs to support this kind of training and not be the ones who actually need the training." Maybe not the "most senior" of management, e.g., VP level if there's a management structure below that --- but mgmt. pretty high up the ladder (elegant syntax, eh?) should be part of functionality training.

I think someone said something earlier in our exchanges about doing reports over and over, because the manager asking for the report wasn't communicating what they wanted. One reason they can't communicate what they want is because they don't know what's possible; what is available in the dB; what their system can do. When I was "on the other side of the table" and was in that senior mgmt position, I worked with more than one system in which I couldn't have produced a report -- didn't know steps 1-5 to make it happen -- but I did know what data was available and what the system could do -- to the great relief of the database administrator with whom I worked. BTW -- I had plenty of other annoying characteristics to drive the staff crazy, though!

After reading this very good discussion, with which I agree, I just wonder if we are the only department that is not understood as much as we wish we were. Does the alumni relations staff, the special events staff, the development officers, etc. think the same way about their areas? If there is any truth to the statement made below of "the apparent resentment "we" have towards "them" ", why is there resentment? Is it because we don't understand what it truly takes to do their job? Do we think that their job is easy or that they are not as productive and hence fall into the same trap?

I think it's a training issue. We may create a problem for ourselves if we try to portray that we are the poor-old-misunderstood group. We need to train as was mentioned in another response. Take control, have people do what we want at the same time we are doing what they want (as we are truly a customer service oriented group).

My experience is that fundraisers may not know as much about the details of fundraising vs. the art of selling as we wish they did. We created a training program here called:

Gifts and Pledges
IRS, University, and CASE Guidelines
"Everything You Need to Know" (Almost)

This training consists of basics that we all know such as:

- -Why this Training?
- -Gift, Pledge, and Grant Policies
- -Advancement Definitions
- -Pledge Write-Offs
- -Pledge Reminders
- -Aged Pledge Receivable Report
- -Quid Pro Quo Contributions
- -Games of Chance
- -Gifts-In-Kind
- -Partial Interests in Property
- -Software Gifts
- -Corporate Sponsorships vs. Advertising

•-Contributions vs. Contracts (Exchange Transactions)
•-Scholarship Gifts
•-Where to Get More Information

I have seen a number of people who you would think should know this stuff say “That's new to me”. Not only do people get trained, it’s a great opportunity to start sharing what we do. It's a process.

One of my top 10 peeves is that the data is the institution’s data, not the Advancement Services data, and that EVERYONE has a responsibility to keep that data as updated as possible. We’ve had development officers complaining about data in a meeting because we have one employment information and they know it is different. I continually have to point out to our DOs that they are the people with the relationships and if there is inaccurate information in the system because someone switched jobs to let us know. We send out quarterly surveys to a percentage of our alumni, however, we don’t get all the surveys back.

Recognition and Communication Issues

Prospect Research is more than “Googling” a name and takes significantly more time, some good instincts and the right tools and training to do it well.

I'll try to keep this as succinct as I can, but roughly in order of importance (or hair trigger factor) they would be:

1) Advancement Services - as the field has evolved - covers more than one area of focus or domain of responsibility and frequently includes oversight of technical support, database management, gift and demographic data entry, prospect research and stewardship, in addition to (in many cases) event management, development communications, personnel and budget management. Fundraising = bringing money in the door.

2) Working collaboratively with our departmental colleagues seems to equate to AS staff having to understand all the intricacies related to fundraising so that our records are accurate and the fundraisers are able to build the case for support based on those details; yet there appears to be a comparatively small requirement of fundraisers to return that degree of comprehension for what happens on the “other side of the house”.

3) Flexible work time is what all fundraisers need in consideration of prospect visits, event attendance, etc., with no real tracking of how many hours are actually invested in

any given day/week/month, etc., but AS staff must clock in and out and meticulously detail each and every hour of work.

4) No, “These are not rules I'm making up, they are IRS REGULATIONS!”

5) No, data entry is not a magical process best based on instinct and guided by how things have 'always' been entered; there is a reason that we ask for back up documentation and once received it becomes the basis for how the details get entered (telling us after the fact that “it wasn't supposed to go there” and blaming us for an error isn't an endearing habit).

6) No, a Holding Account is not divine intervention to alleviate the need for proper documentation and some indication on the part of those agreeing to accept charitable contributions that they have an idea of how the money is supposed to be used.

7) Yes, there is a need for professional development in the areas of Advancement Services as we are also a significant factor in the overarching processes for facilitating the flow of money into our coffers.

8) Yes, you really should engage the potential donor in a discussion of how s/he plans to fulfill that multi-year commitment of funds so that we avoid issues of entering individual pledges where the intent is to pay using Donor Advised Funds or some similar charitable giving mechanism.

9) Our least favorite methods used to bring charitable revenue in the door are (not necessarily in order of pain factor) raffles, auctions, and golf tournaments.

10) If you are going to say the institution is adhering to industry standards for benchmarking, etc., then there should be some intent to actually follow those standards [no, additional dollars that happily arrive in excess of the projected bequest expectancy counted in a previous fiscal year do not constitute a new gift in the current fiscal year; no, the fact that we have a good phone number, good land address and good email address on the person but s/he has said they prefer only one of those methods for hearing from the institution does not exclude them from being counted in your “contactable” pool].

Our campus decision makers do not believe that the Advancement Services area, which supports every single fund raising effort, is as “important” as other areas in Institutional Advancement and therefore our salaries reflect those views. I have campaigned for years to bring my staff's salaries to comparable levels, with minimal success. As a director, my salary level is equal to associate directors in Major Gifts, even though they have none of the program, budget, staff, or other major responsibilities that I have in running an entire department.

It amazes me that most, not all, senior development management doesn't understand what really happens in Advancement Services today. And as far as the costs involved in running a decent shop, well that is totally incomprehensible. I developed my soapbox stance on this topic in a chapter for John's next CASE book..."It's All about the Data."

Essentially, they don't grasp the A.S. business: the level of sophisticated technical skills needed to manage our databases, the legal issues in gift processing, an understanding of planned giving vehicles, the mandates from state and federal governments that we have to follow...And the "data entry" misnomer is a huge one for me, too. That one really gets me going since the work this group does is the foundation for all of our work in development and alumni relations. And, then there is Donor Relations and Stewardship, reporting, prospecting, etc. I said to one of the former VPs of Advancement in my life, that it would be much easier to replace a development officer (pick almost any one of them) than to hire a new (put in the name of a report writer or prospect researcher or bio and gift director or technical database expert).

Unfortunately, we are all too good at what we do...reports or research get delivered no matter how last minute a request, donors get thanked and stewarded, The IRS rules get followed, pledges and gifts get processed and addresses get updated, FASB reports are delivered, all while we collect and maintain more data than ever before in more formats than ever before and in more places than ever before. We mine the data, apply it, analyze it, and produce it in meaningful reports. We are all "knowledge workers," and that fact is just not understood at the top. Maybe if we all called in with a really bad case of the flu in late December....

Support staff? Hardly. We make the "show" happen. Whether we don't market ourselves and our services well enough could be part of it; however, I really think without a VP or two at the top who understand the value of the information, not much will change.

One of greatest issues I've dealt with in several cases, that feeds into most of what's being said, is the lack of understanding of how much active, hands-on management, supervision, strategic thinking and planning is required to effectively do all the standard Adv Serv jobs every day - and how the smallest change in front-line plans can throw all that for a loop (especially when it's communicated to services folks when a decision has been made, as an afterthought). There's usually an idea that the little elves go to their area and magically push a few buttons and make all the shoes overnight and everything comes up the way it's asked for.

To respond to a shifting kind of environment, a shop needs to be agile. To be agile, it needs to have a clear framework of goals and objectives in place, and excellent communication and project management efforts to know what can be shifted and how to accommodate, with everyone adjusting in sync. Many of these efforts and structures are seen as formalities, which, if dispensed with or interrupted, will have no great effect. And frequently, staff are promoted or moved to these roles as a result of their tenure or knowledge of existing processes with no thought to their managerial capabilities, planning or strategic thinking or internal communication abilities or talents, since all the elves are supposedly on autopilot and just need someone to sign their timecard. At times the results are disastrous, and allowed to fester, because it's hard to pinpoint exactly what went wrong...

I would like for senior management to recognize that we are actually experts at what we do. When a person is hired that has years of experience in the field and affiliation/participation with the relevant professional organizations, they should work with us and treat us like other professionals in the organization. The lack of a degree in Advancement Services does not mean that we have less capability or expertise than someone with an accounting or IT degree; it is simply another skill set. I can't tell you how many times my decisions or input have been questioned or second guessed only to then be confirmed by "someone else".

Also, it is necessary to set goals and objectives with AS that compliment and support the fundraising efforts. Many times the goals and objectives of the rest of the development team are not communicated appropriately nor created with the capabilities of AS in mind to be able to support those efforts.

One issue I have is how Gift Administration is perceived as "Clerical". WE ARE NOT CLERICAL!!! Our jobs are just as important, if not more so, than some upper management. Our work is very involved and extremely tedious, yet we are not paid nearly enough for the amount of work we do. People need to step into our shoes for a day and see exactly how much is involved in our daily workload. I think the job class codes need to be reclassified and the pay scale increased so we have room for advancement and possibly be able to make a decent living!!!

As several others have aired here, there is often a perception in management that Gift Processing is essentially the activation of an automaton, who is placed before a keyboard and aptly armed with a variety of different chewing gums. I have theorized that this image occurs because senior management has, generally, never "set foot in the mailroom," so to speak, and never has to worry about the myriad issues that gift administrators deal daily because, well, the gift administrators deal with them daily and they ne'er have to concern themselves with it.

In short, we protect a whole lot of people. We make sure that gifts are administered in the way the donor wants them to be administered in accordance with more laws than I care to count. We protect management by doing exactly the same thing. We steward our donors perhaps more than the officers who are assigned to solicit them. We are the hub between multiple offices; we are the links between development offices and business offices, and we make both look good to donor and auditor alike without ever receiving much of the credit.

We are measured in numbers which are as nebulous as fog but taken as rote by management; for example, numbers of transactions. What on Earth is “a” transaction? It might be a $10 check that takes me thirty seconds to enter, or it could be weeks of work. Last month, for example, I had a donor gift shares of stock to our broker, but I had no idea who she was. This happens frequently; “mystery stocks,” I call them, when the transferring broker doesn't tell our broker who the gift is from and I am not told by the donor that they are planning on sending them. When this happens, I ask our broker if they can help find out who the donor is, then I run queries to see who has gifted that flavor of stock in the past; I also value the current net worth of the shares and then run other queries to see if any of our alums who have given stock in the past have pledge payments due near that value, and I send e-mail after e-mail in an effort to identify the donor. If I can identify the donor, I usually have to also secure documentation for which fund they would like to support, and if I can't identify the donor, I have to send the shares back, lest I break the USA Patriot Act. I create forms for our donors that are available on our web site, and I've even gone so far to put stock donation instructions on the back of my business card so that our Capital Gifts Officers can hand them out like candy. So, after doing all the research I could possibly do and not receiving any word from donor or broker, I had to send the shares back to where they came. Weeks later, the transmitting broker finally notified the donor that the shares were sent back, and I had an irate donor on my hands who couldn't understand why I had “refused her gift.” As a bonus, I was rewarded with angry supervisors because they have no idea (regardless of all the e-mails they had received regarding the very same situation) what I had to deal with. SO, I personally called the donor to explain the situation in detail, made a friend by doing so, and she re-sent the shares and faxed me the form that I'd sent her. When the shares arrived, I coordinated the sale of them with our broker, valued it, entered the gift into Raiser's Edge along with a tribute to her late dad, scanned the documentation electronically, filed the .pdf file to our server, generated an acknowledgement letter (in memory of her dad set in quite nicely) and sent it off to the proper person here to sign it.

That, folks, counts as ONE transaction. And strangely, the person who signs the letter and has the gift count as part of their numbers will often complain to me that they “are getting too many letters,” as if I can control the flow on incoming gifts with telepathy or by praying to Patron Saint of Gift Administrators.

Stuff like this happens every day, several times a day. And when it happens in December, when you have a stack of gifts on your desk that will count as “other people's numbers,” you earn your pay and then some, and no one really sees it; in fact, the idiom “No Good Deed Goes Unpunished” often is a rule of thumb. In light of Congress and Check 21, we make sure that checks are made out correctly, (or if they are even signed!) when they're not, we find ways to send them back without ruffling feathers. In light of IRA distributions and Gifts-in-Kind, we make sure every letter is worded properly, every receipt is correct and armed with the proper disclaimers. We develop easy-to-use forms so that stock gifts are known and not mysteries, and so that funding intent problems don't occur, and then we have to hold the hands of our colleagues so that they actually use them. We run credit cards and keep track of those that “don't go through.” My CASE Standards book has been opened so many times that it is falling apart, and no one other than us really gives a rat's bum what IRS Publication 526 says or means until they are faced with an auditor's question regarding it.

I could go on for quite some time, but I won't take up any more of your time. The bottom line is that we have learned to juggle chain saws together with watermelons to get our jobs done, but people still look at us as though we chew too much gum.

I HAD to print (the above message) out for future use. And after spending all that time on one gift there will always be someone who wonders what you do all day long because only a few gifts came in that day. I hate to read on this listserv “how many gifts a gift processor ought to be able to process in a day” - it just does not work that way.

As I see it, most of our problems stem from inaccurate perceptions and lack of communication. So the more “we” can do to educate “them,” the better off we'll all be.

Our Gift Administration department recently held a retreat on this very topic. We came up with several ideas that might help.

For one, someone from GA should meet individually with new gift officers -- at whatever level that's practical -- aside from whatever regular orientation program you have. Whenever your GA director gets the chance, s/he should speak to development staff groups about “what you need to know about gift processing.” Try to make it as entertaining and as lively as you can. Maybe do a “Jeopardy” version or game show format.

Print up cards to pass around. Send out annual memos for year-end giving and at other significant times. Send out SHORT notes, or post them on your intranet if you have one, reminding everyone about some aspect of GA that they need to know: “Don't forget: let us know when someone is sending us a stock gift.”

Make sure your contact information is posted somewhere: “For questions about stocks, contact X. For questions about matching gifts, contact Y.” Do anything you can to ring that little bell inside their heads to remember to contact GA when necessary.

We have to promote ourselves, folks. Nobody's going to do it for us. If we purport that processing gifts is much more intricate than it sounds, and it most definitely is, then we need to be as proactive as we can about educating our customers, internal and external.

I'd like to add one thing that I try to explain to advancement services and development professionals alike: We are Fundraisers! I like to make the point that our organizations fundraising efforts start and end with Advancement Services. We are the first to enter information, we research prospects, we develop mailing lists, we enter gifts, we provide receipts, we send thank yous, we steward donors. Then the process starts all over again. Although we are not on the front-line like a development officer, a phonathon caller or a VP, we are responsible for getting things started and tying up the bow when things are done. If we don't do our jobs, and do our jobs well, then our organizations cannot effectively raise funds, nor can they comprehensively advance their missions.

Most of us are in the Institutional Advancement division because we are advancing the institution. Fundraising, friend-raising or awareness-raising; these are all functions of advancing the institution and our work is directly related. But many of our colleagues don't see us in this light. Many of our colleagues may see us as an extension of the IT division. Sometimes as an on-site tech team. But it's our responsibility to express to our peers that we are a piece of the institutions fundraising efforts. We just happen to know a little more about computers.

I've had that conversation with my boss (who also receives these listserv responses) on more than one occasion; "don't all people who have jobs experience some form of lack of appreciation or understanding regarding their positions?" Undoubtedly and undeniably so. Personally, I think the way we are perceived is not in the norm, and I'll share with you just one story as to why I feel that way.

Several weeks ago, when I was working 14 hour days (and longer) without lunch breaks in order to just keep up with the flow of end-of-year gifts coming in, I attended a staff meeting where the possibility of getting an assistant for me was addressed. Two people in particular ridiculed the idea in a manner as insulting as I have ever heard on Howard Stern. ("Do you *really* need an assistant? I mean, come on...") I would have been happy to show them personally how much I was doing in the week between Christmas and New Years -- in order to train them, so to speak -- but like so many others, they were on vacation at that time. Perhaps everyone experiences this kind of lack of appreciation. I don't know. I can only speak for myself, and it may be merely my opinion, but those two people -- who have spent a cumulative 30 seconds in or around my office over the past three and a half years -- are pretty clear indicators as to how others who don't know what I do tend to perceive my job. And in my opinion, I sure don't think that everyone who has such an integral and important job has to deal with such a poor perception of what they do. If there are, well, I'll happily buy the first round and we can compare notes. I'll buy the second round, too, and we can discuss if it is a reality (or not) that we might exist within a system that perhaps values the money-getters more than the money-administrator.

It is a human oddity that when people don't know something about a subject, they fill in the missing pieces with what is easiest for them to comprehend (thunder? Oh, no, those are the Gods, bowling). I think that there are many people who do the same things that I do who are frustrated by this phenomenon. Hence, I have a feeling that people like the two I spoke about in the last paragraph picture us as automatons chewing gum. If I were a gum-chomping robot, I wouldn't care, but I certainly want my Director of Development to know that I am not a gum-chomping automaton, mainly because I deserve to be compensated for what *I really do*.

Another phenomenon -- one I am very thankful for -- is how people around me who see what I do on a daily basis tend to appreciate me a hell of a lot more. An immeasurable amount more. That's a happy, productive atmosphere where things get done. So I believe that it is in the best interest of myself and of my organization that upper management is educated on what I do. That's why we're discussing this today, is it not? And while I agree that the best way of educating upper management is through training, what I'm finding to be perhaps more effective (and perhaps more realistic) is keeping my DOD and others informed through CC-ing them on e-mails and keeping them in the loop. Not to “sell myself” to anyone, but to educate them and try to cultivate a more productive, more efficient, “healthier” Development Office.

Here I end my rant, and please forgive me for venting (especially you, Mr. Saunders, I'm not upset about your post, nor am I angry, and I'm certainly not trying to pick on you) but each year I coordinate a conference of gift administrators between us and six other schools, and I hear the same frustrations shared by all each time we gather. I know we're not the only ones. These are real issues, so let's not short-change ourselves the way those who perceive us as automatons do and shrug it off with “doesn't everyone feel this way?” I'm not pretending to be special, I'm only trying to be honest and support the people who do what I do for a living because it's the only life I have.

I often feel like I am just being difficult or complaining when I question the reasoning behind a gift procedure, for example. Or when I suggest that the work involved in coming up with a complicated solicitation list or thank you procedure may very well not be cost effective. I question it because I need to understand why the change is being made and I hope by asking the right questions and pointing out the difficulty in the process that I am not conveying unwillingness to change or do something new but rather that I don't want to have my day eaten up with cumbersome procedures that in the end don't make us any more money, because I'm not just the data entry clerk I am a fundraiser who also knows how to make the computer work magic!

To add one more to the top 10: Development staff (i.e. MGOs and fundraisers) often assume that we (AS) are all interchangeable. In a perfect world, yes, that would be the case. Unfortunately, the limited resources, time, budget and humanness of us all, prevents us from being all things for all people.

The one thing that I find usually fighting with management is their perception that (AS) is the enemy because we enforce rules and question procedures that might stop they great “creative” ideas from happening. Fundraisers in general find that AS is argumentative, and does not want to play like a team. They find that because we don't think that accepting a property in Mongolia as a gift --no questions asked-- is in the best interest of the institution, we are trying to push donors away and want them to fail at achieving their fundraising objectives.

The reality is that we do what we do to protect the institution from expensive mistakes; to protect the integrity of the data they use every day so 10-20 years down the road the database contains all the institutional memory and prospect information that they need; and ultimately to make sure that they have all the information and the tools to make responsible decisions, or simply to avoid looking like idiots when a donor has a question or they are establishing a new relationship with a donor. We want to make sure donors see our institutions as responsible organizations they can trust to give their millions.

A couple things that I don't think I've seen so far are: 1) Communication between Advancement and Finance - better understanding of “yes, we have to follow IRS/CASE/CAE, etc guidelines and you have to follow FASB/GASB” and there are differences. As I work with foundations and other nonprofits there seems to be a heck of a divide in understanding of the differences of how to count gifts and pledges. AND it seems to be the Advancement & A/S folks that seem to be expected to understand those differences. As a former/”recovering” accountant, I'm sad to say that more of the Accounting folks don't seem to understand or take the time to understand the differences.

2) Clear lines of responsibility between A/S and institution IT - who's suppose to load the next release of the Advancement software? Who keeps the Adv software and the operating system/DBMS software in sync? Are Advancement folks supposed to know what they want, or are IT folks supposed to tell them what's available in terms of reports, functionality, etc? There are just so many pieces of information “on the cusp” between these areas, there must be some overlap. But I seldom find a clear delineation of roles & responsibilities between these two areas.

AND TO CLOSE...

Just a thought that I'd share from many years of looking at different organizations. We in Advancement Services fight some of the same battles that IT folks fight routinely. That is, we don't do a good job of telling our colleagues or our bosses about our accomplishments. Few shops that I work with have an monthly status report saying we processed X gifts, Y phone calls, Z bio changes, XX special projects, YY requests from the VP (all at the last moment), ZZ reports, etc.

It's also important to keep management apprised of backlogs of work - gifts, filing, graduate load, etc. Are they growing or diminishing?

By quantifying our work, we then have a better tool to show colleagues/bosses what we are doing and why we may need additional staff (e.g., Development staff has increased by 20%; giving is up by 35%, and we keep trying to do the work with the same level of staff that we had in 1998.)

You are good and it's important to regularly "toot your own horn."

And then there is the question of retention . . . does this practice exist, or do we just continue to allow good people to move on because we cannot get them the appropriate recognition and/or compensation?

I'm not the Director of Advancement Services, but here, to a certain degree, is what I have been saying to my org or would say if I were the Director.

1) AS is a professional field. It has been my experience that once you leave higher ed, you may well be falling into a black hole. I am VERY glad you are networking with AFP to increase awareness beyond higher ed about AS as a suite of professional skill sets. I need senior management to add to their "to do" list to be open to education about how Advancement Services can help them manage workloads and their definition of success.

2) We need a Director of Advancement Services. I believe senior management needs to understand that not having someone assume responsibility for this area puts the organization at risk.

3) You count what you value, and you value what you count. Our annual professional surveys of results are rudimentary and vague. (Imagine the CASE M&RS as a one - three page document.) I think it is an AS responsibility to recommend which annual survey(ies) we should use and to base some of our internal management metrics on "industry standards" when we can find them. We are a new(ish) organization so a large amount of time is spent cleaning up data and contemplating, "Why do we use this data field the way we do? Why are we gathering This data and not gathering That data? What is it we want to report on?" I have come to see it as my job to offer senior management a menu of data and a menu of report formats. I need them to explain to me why they chose what they chose, and to consider me a partner in helping shape some of the values of the organization, for instance, "How shall we define successes?"

4) Senior development managers are tasked with looking at the big picture, and I think it is an AS leadership responsibility to provide some of the structure to the picture, for instance organizing the data so the reports are coherent. I need them to know that I need to be the proverbial room at some early point when they are discussing big picture issues because herding data in new directions takes planning and time.

5) Managing and interpreting data is very time consuming. It is my responsibility to clearly document why we need more FTE and at what skill level we need it. It is senior management's responsibility to do an effective job of folding that need into all the other pressing needs of the organization. I don't know all the budget pressures our organization is dealing with. I can make the case, however, that better data will save money, and may well make the gift officers more productive, the trustees more informed, the volunteers more productive. It is my responsibility to make the case for enough staff in a "language" that senior management understands. I need them to respect the importance of good data.

6) Ditto your comment, Robert, about gift entry and the same with bio entry. Accurate data is vital, but so is nuance. If we just shovel the data into the database as fast as we can, it costs us in the long run. For instance, recording soft credit correctly is time consuming, but without soft credit, prospect research is less effective. This has fallout from less accurate gift charts, to prospect screening, to how much money we might raise.

7) I need fair compensation and so does my team. If industry standards are low (is it sexism? is it the relative newness of this area as a profession within development?), I need the organization to base compensation on what value my team brings to the table, not to perpetuate the problem, for instance, that many other organizations pay their gift processor like a typist.

8) I need a decent training budget. The more my team knows about software and best practices, the less crushing the load on me, and the more we can offer our organization as a team. I think there is an undervalued ROI on this. If I had not heard Jon Thorsen a few times at APRA conferences, I would not be striving to embrace the bigger picture and I would not be holding myself accountable for moving things ahead, even of others don't quite get it (yet.)

9) MY pet peeve is that I wish we used an effective annual performance review tool rather than a paperwork exercise for HR. If I were the Director of Advancement Services, I would have to do the obligatory form, and then create some secondary, sincere and meaningful opportunity for talking about performance and goals.

10) I need them to understand that several roles in AS are teaching roles and if we get the right people in the room at the same time, we can teach groups rather than have constant one-on-one meetings. One-on-one meetings have high value too, but sometimes a little tutorial from AS staff needs to be on the agenda of a group meeting. Again, people from my team need to be in the room and on the agenda.

If I were the Director of Advancement Services, those would be some of the key issues that come to mind.

Organizational Structure

I feel that one of the sources of my own problems is the reporting structure at our institution. My supervisor is the Director of Development, and she reports directly to the VP of Advancement, who is also, essentially, a Development person. It is very hard to get support for my position because I have no real authority within the institutional hierarchy. I report to someone who does not know Advancement Services (although, to her credit, she has been making an effort). Then *she* reports to someone who doesn't know Advancement Services. The whole concept of Advancement Services as a professional area separate from Development is brand-new here. We all know that sometimes Development and AS are on opposite sides of the fence, and I feel that reporting to Development makes it impossible for me to do my job effectively. If I make a recommendation that runs counter to the desires of the Development folks, I don't have a leg to stand on no matter how valid my position is. For example, I am currently engaged in a debate about our policy on receipt dates. Receipting gifts is clearly one of AS's areas of responsibility, yet the final authority for the content of those receipts rests with Development. It wouldn't make sense for the Dean of the School of Business to tell our Chemistry department what kind of experiments they should do in lab. Why is it acceptable for Development to supervise a department that should be separate but equal?

So... how many of the rest of you are in the same boat? Do your institutions have at least one Advancement Services person at a "Director" level or higher? Do you report to supervisors in other departments who have limited understanding about what you do?

I think you've posed a great question, who do we report to and how is our development office structured? I am the Director of Advancement Information Services for my school. I recently assumed this position when our former Director, who was my boss, retired. My former position (Manager, Development Information Systems) isn't being replaced so I am retaining all of the responsibilities of my old job and have of course gained responsibilities with my new job. I report to the Director of Institutional Support who reports to our VP for Advancement. Before our current VP my position reported directly to the VP. This reporting structure was changed as soon as the current VP came on board. Under me I have a Director of Development Research & Prospect Management and her staff, a Manager of Data Maintenance and three Gift Recording/Data Maintenance Specialists. I am lucky that my supervisor has been here for many years and has worked her way up during her time here and has gotten a good feel for all aspects of development. I think that she has a pretty good understanding of what it is that we do and the time it takes to do it and will generally be a good advocate for me to the VP.

With that said I also face many of the frustrations stated in previous posts. We don't just process gifts here. We also do bio updating, we do the gift receipting, we do the gift and pledge document imaging and of course the dreaded photo copying that I cannot convince folks to let go of. In my shop we often joke that somewhere in our job descriptions we need to add "Detective" because of the amount of time we spend trying to make sure we enter things correctly the first time when we aren't provided with all of the documentation we need. I could relate three or four recent situations where more money was spent in staff time figuring out what to do with a gift then the value of the gift itself. I'm interested to hear what others have to say about their departmental structures. This is a great thread and it couldn't have come at a better time for me. Thanks to all who have contributed to it, it's comforting to know that I'm not alone in my frustrations.

What Can We Do About It?

I have read these responses and agree with them wholeheartedly. I'll spare you all the details of my own frustrations since others have summed things up so neatly, but I would like to ask a question.

What can we do about it?

I had an interesting chat with my supervisor, who is a Development person. She's been making an effort to understand Advancement Services and went to a few sessions at the CASE V conference this past fall. She said she was struck by the apparent resentment "we" have towards "them." I believe our feelings are justified (boy do I ever!), but I also agree with her opinion that they're probably not very productive. I would be interested in hearing if any of you have effective strategies for educating and collaborating with our counterparts in other areas of Advancement. Perhaps there's a solution to our problems...

Have any of the listers who are hovering over this conversation been able to rise above these hurdles? If so, please share. Let us know how you managed to do it, and what the changes meant for you in terms of improved communication of decisions that were made and directly affect you but you weren't considered or involved in the decision making process, what did the change mean in terms of your compensation, etc.

I wonder if this dilemma has been presented to Sr. management via CASE conferences or other industry conferences. As is usually the case with changes such as this, if Sr. management is informed by those in higher authority, then it becomes Gospel much quicker because then it is the right thing to do.

I'd like to respond to the question of "what can we do about it?"

I prepared a document showing an org chart of Advancement Services, main functions of the department, and main responsibilities of each staff person. This doc was distributed to all Advancement staff, and it was then provided to each new staff person who joined our Advancement office. Many staff - particularly major gift officers - mentioned how helpful they found it. And, I believe it was very useful in raising awareness of the importance of Advancement Services. The org chart is online at http://fundsvcs.ncsu.edu/modules/wfdownloads/visit.php?cid=13&lid=55

I know it's a small thing, but after several years as the gift accountant I have my own business cards. To hand that card to a donor who has come to the office or attach it to a stock form is a big thing. There is something about a business card that is tangible. I feel my department validated and acknowledged my importance. It sometimes really is in the small things.

But don't you just love the pure satisfaction that you get knowing you are responsible for making so much happen! I know that I do – whether or not I am recognized!

As an "intermediate" Advancement employee (7 years), I have worked in biographical data management and been a back up to our gift processor. Early on I conducted a benchmarking for my own professional development, and learned in 2000 that the profession had been battling the "back room", "support" operations syndrome. It still is. In our institution, I feel that the perception of who we are and what we do has improved marginally. But there is much more to be done - we are still the "elves" who make it happen. As long as things get done, we don't get a second look. I feel we regularly are taken for granted. But if anything goes awry - look out! What did Adv.Svcs. do wrong???

Salaries: Even our HR dept. classifies the data position at a certain level because it is "just data entry", and not worthy of a higher wage! I have seized every opportunity to educate anyone who uses that phrase in exactly what critical thinking and analytical skills are required to be effective and successful at this job. Beginning as the one and only bio data manager in 1999, I am now Asst. Dir. of Adv. Svcs, supervising 2 FT and 1 PT data people. This staff expansion has not come easily—my boss has worked tirelessly for me and with me to accomplish this. Our team refuses to use the term "data entry" at all because of the negative connotation, and the education process is never-ending. We are truly in data management, whether it be reporting, updating, researching or gift processing, yet our salaries fall behind most industry standards.

Respect/Recognition: We are the foundation of the FR program. Everything that is accomplished is built on good data and research. We still strive to have an equal place at the table for planning, budget, goals, etc. Just because our work is not "face to face" with the donors does not make it less important or vital to Advancement success! Just another reason we need to grow when the MGO staff grows. And once we are recognized for the true value of our work, salaries should follow.

Amen to it being easier to hire/train a gift officer than a good data manager!!! My other peeve is my experience in Advancement Services: Because our positions and salaries are sub-par to the rest of Advancement, we have to worry that our trained, valuable, & talented team members will be lured away to a more lucrative position in Development or even elsewhere on campus! There is considerable time and effort invested in the training of Advancement Services personnel - another unknown/unrecognized reality of who we are.

Other than from an educational standpoint, I don't know how to change the mindset. One rung on the ladder at a time, but if we stall within the Advancement area, what chance is there to convince the higher decision makers on campus? I welcome the opportunity to learn how others are trying to get the message across.

I think the perfect place for a topic such as this is at the CASE National Summit for Advancement Leaders. If anyone knows the conference chair, Sarah Pearson, Vice President of Alumni Relations and Development Northwestern University, this could be a good subject to pass along. The details on the next Summit are:

Summit for Advancement Leaders
For Senior-level Advancement Professionals
July 8-10, 2007
Chicago, IL

I've been successful in this area by recruiting trusted allies from senior management. Taking the example of colleagues ridiculing the idea of an assistant for an administrator who is working 14-hour days, a fundraiser should have spoken up on this person's behalf. This would have taken him out of the position of having to be defensive, bolstered his case with other fundraisers, helped them understand his work and its importance, and provided moral support.

If you can't get that support internally, maybe you need an outside opinion. Not to knock my profession, but this doesn't have to come from a professional consultant. Academic accreditation is done by peer reviewers. I've been part of IT assessments that were done by CIOs from other universities. So perhaps an Advancement Services director from a comparable institution could review your operation. However, one of the keys to a successful consulting project is having the right sponsor. The consultant must be hired by your boss and report to him or her. You can't hire your own reviewer.

On the subject of spreading the word about AS at conferences, I can at least say that it's being done at CASE District VII conferences. Over the past several years I've seen more and more fundraisers attending AS track sessions (particularly the Senior Colloquium in AS). I firmly believe that this helps break down communication barriers.

Last year I organized a panel for the AFP International Conference called "What is Development Services and Why Should You Care?" It was aimed at fundraisers outside higher ed, where Development Services departments are (unfortunately) still rare. I'm hoping that AFP will add a Development Services track to the conference, but they're not there yet.

It takes but one person who "gets it."

I, and several of my esteemed colleagues, have been asked to come to fundraising conferences, senior administrator conferences, and large campuses to address these (well, not all of these - but many!) issues thanks to one person who understands what we've been talking about. And the common response from attendees has been, "You guys do all that?" Or, "Are those really the rules/laws/regulations?", etc.

Whether the culture shifts after we leave, I don't know. But at least I know I - and others who do the same thing - have been heard. It's a cumulative process, I think. One person or one conference isn't going to do it. It will be a combination of many presentations, papers, e-mails, etc. And, yes, the soon-to-be Association of Advancement Services Professionals will help further make the case, just as CASE has.

Speaking of which, CASE is darn close to publishing our next book: Advancement Services - A Foundation For Fundraising. Buy it as a present for your management. It should open a few eyes. It's been authored by over a dozen of our friends here on FundSvcs. It will help further our cause.

Well, on the compensation issue, the most recent CASE Compensation Survey (and resulting report in CASE Currents) shows that our profession is gaining ground. And the same survey showed that we "retain" far better than our fundraising counterparts.

It's a good read - if you are a CASE member:

http://www.case.org/Currents/ViewIssue.cfm?contentItemID=5350

I have been watching this with interest, resisting the urge to weigh in because the original question was about frustrations. But, I have to admit to being a little disheartened by all of this, though trying to take it in stride, given that this is an AS forum and we all need to vent at times.

I've seen people switch from being on the services side of the shop, to being fundraisers. I've also seen people transition the other way. In both cases, I've invariably heard the same sentiment: “I had no idea it was so hard to do this.”

I can honestly say that I've only rarely experienced the kind of frustrations and lack of respect I've seen discussed today. Of course there have been difficult coworkers - but certainly as many within Development Services as within Development as a whole.

I have been thinking about why my experience would be so different from what sounds like the norm. I have to go back to my first month as a JV report writer. I handed off a report to an Annual Fund staffer, following what she requested to the letter because we'd had a disagreement and I didn't feel like talking with her. She then made a bad decision - because she couldn't make any other kind based on what I'd provided.

The then AVP for Development Services (rightly) pulled me aside: “You gave her what she asked for, not what she needed - and in my shop, we don't do things like that.”

Here's what I learned: If I want fundraisers to respect my work, I need to respect theirs. I need to make as much effort to understand their world - Annual Fund, Corporate and Foundation Relations, Planned Giving, Principal Gifts - as I hope they will make to understand mine. Fundraising is hard - fundraisers are dedicated folks, pulling as many extra hours staffing events, cold calling, on planes, and signing thank you notes, as I ever have behind a computer. Even if they have a frustrating day, and possibly a short temper, their work will get my respect even if their immediate behavior doesn't. A gentle answer and a simple, “Here's what I *can* do” at 8:00pm the night before an event goes much further than any other response, and isn't soon forgotten when I need them to trust me that something might be more difficult than it seems.

To add to the first point--in all my experience in this field, this particular relationship has been one of the most crucial, if not THE most crucial in some cases. And, yes, generally the responsibility of understanding the differences has been front-loaded on the AS folks. I don’t mind that, though. The more we know about our field, including the differences between finance and advancement, behooves us greatly. Gaining the trust and respect from the CFO is a huge benefit to the organization overall. In many cases, the finance folks do not view advancement as having the financial knowledge that is necessary for proper gift recording, etc. And, while it is not necessary to be an accounting major, it doesn’t hurt to have a book or two about non-profit accounting sitting on your resource shelf. It certainly adds to your credibility when you’re “making the case” for your gift recording methods, what counts/what doesn’t count, etc.

One of the reasons our group has grown so large and has become widely known and respected is because we ***are*** the researchers—in every aspect of the word. We are willing to look up, read, and learn whatever it takes to help us do our jobs better every single day. And, additionally, while we certainly are not mind readers, I believe it ***is*** up to us to interpret what folks are "really" asking for with lists/queries. They usually know what they need, they just don't know how to ask for it. That's where we come in with the prompts.

I empathize with everyone who struggles with making the case at their respective organizations. To them I simply say, keep plugging away. The best case we can all make for ourselves is to lead by example. "A man is known by his acts…"

Thank you for all of your responses. This has been a great discussion and I hope that it will continue at conferences, on the list, and through the AASP when it gets rolling.

— Robert

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