GETTING THINGS DONE: How Advancement & Finance Really Can Work Work Together

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What were you hoping we would cover in this session?
GOAL

To go home and have a healthy conversation with your advancement colleague, recognizing the professional relationship can and should be a true partnership with trust as the foundation.
What We Will Cover

1. Common Tensions
2. Collaborative Goal Setting
3. Consistent Reporting
4. 21st Century Funding Model
Common Tensions

• Are we really listening to each other?
  • Video: Office - Active Listening
• Fully Orbed Development Program
  • Current Gifts vs. Deferred Gifts
    • Long-term Sustainability vs. Operating Budget
    • Its all about the “Annual Fund”
• Our Numbers Don’t Match
  • $100k CGA – What amount do you report?
• Other Examples?

*Gift Acceptance Guidelines:* Will REDUCE both internal and external tension.
Collaborative Goal Setting

- Development Reports vs. Audit Results
  - Bookable and Non-Bookable Pledges
  - Software reconciliation
- Annual Fund Goal Setting
  - Developing a Healthy Process
    - CFO and VPA start the discussion
    - “Pushing without shoving”
    - Growth versus Reality (data driven)
  - Is your Annual Fund…
    - Reaching Goal?
    - Growing or Slowing?
- What process doe you use to set AF goal?
Reporting

• Agreement:
  • Key Metrics
    • Total Giving vs. only Annual Fund
    • Non-Development Metrics (Communications/Alumni)
  • Gift Recording Process
  • Gift Agreements vs. “Napkin”
  • Unrestricted Estate Gifts – Policy?

• Board Education
  • Development
    • Development Tools
    • Reporting
  • Audited Numbers
Reporting (cont.)

• Dashboards:
  • What are the key development metrics that need to be included on CFO dash board?
21st Century Funding Model

Creative ways to fund an ever growing operational reality while donors continue to migrate to restricted/designated giving?
The “One” Question

What is the “one” question you would like to ask your VP of Advancement but haven’t yet? (or don’t feel comfortable asking! 😊)

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