


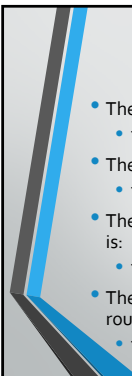


The Evolving Role of Advancement Services

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Isn't The World of Advancement Just Like a New Car Dealership?



New Car U

- The person responsible for sending you sales fliers is:
 - The Annual Fund Director
- The automobile salesperson is:
 - The Major Gifts Officer
- The finance guy who tries to sell you extended warranties is:
 - The Planned Giving Officer
- The service manager who hears your complaints and routinely services your car is:
 - The Advancement Services Professional!

The History of Advancement Services (it's a short one!)

- First Ever Advancement Services Track at a CASE District Conference – January, 1990
- First Ever Advancement Services Conference – May, 1990
- First Ever CASE Article on Development Services – 1991
- First Ever Listserv Dedicated to Advancement Services - 1994
- First Ever CASE Book Dedicated to Advancement Services – 1999
 - And book #2 didn't come out until 2007 (#3 in 2016)! #4 is underway...
- First Ever Professional Association Dedicated to Advancement Services - 2007

What Do Advancement Services Professionals Think They Do?



What was the role of Advancement Services?

- To process gifts
- To maintain biographical records
- To issue receipts
- To generate reports

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What *is* The Role of Advancement Services?

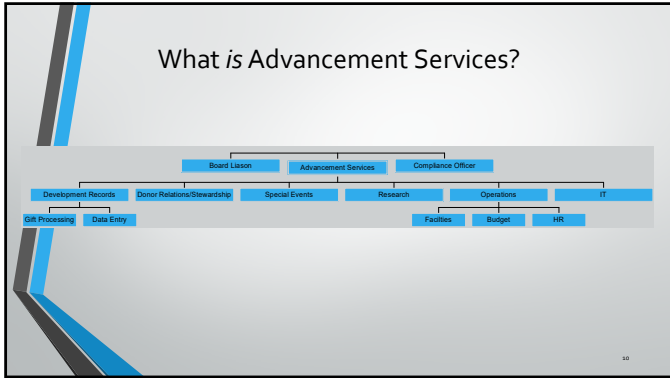
- To facilitate fund raising, gift processing, fund management, and stewardship.
- To effectively provide the backbone of the fund raising enterprise.
- To make the fundraiser, and school, look good!
- To keep administration officials out of trouble!
- To understand, and explain, all regulations governing fundraising and gift processing.
- To prepare the organization for a campaign.
- To ensure the organization maintains high ethical and accountability standards

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What was Advancement Services?

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graph TD; A[Advancement Services] --> B[Development Records]; B --> C[Gift Processing]; B --> D[Data Entry];
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- ### Basic Functions in Evolving Advancement Services Programs
- Compliance with rules/laws
 - Data/gift entry
 - Prospect/Donor Research and Management
 - Stewardship/Donor Relations/Development Communications
 - Advancement Technology

- ### Time For A Quiz
- When Advancement Services does not report directly to the CAO, it reports to:
 - a) Controller/Accounting Director/Treasurer
 - b) Director of the Annual Fund
 - c) Director of Alumni Affairs
 - d) Director of Planned Giving
 - All are correct! But in order of frequency:
 - b, a, d, c

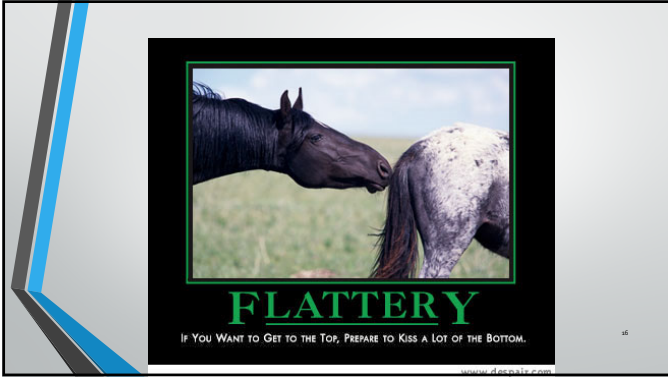
Who Do We – And Should We – Report To?

Expanding Advancement Service's Voice as our Role Evolves

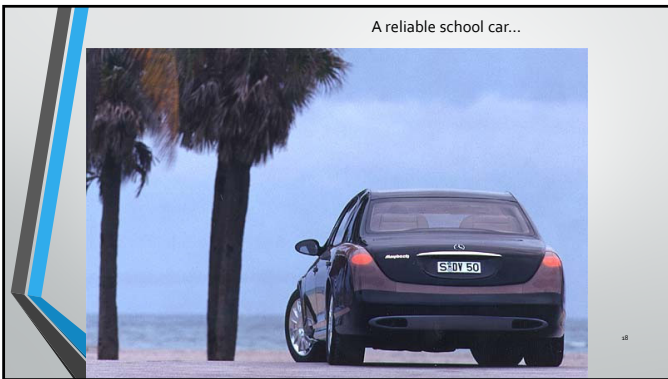
- What's in a title?
- It's time to invite us to the table
- Speak now or forever hold your peace
- But how?

How Do We Get Respect?









The Reality of What We Are Likely to Get . . .



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WE Must Make the Difference – WE Must Speak Out – and WE Must Push for Accountability & Ethics In Our Shops AND Our Institutions

The Advancement World is Changing

- More and more NPOs are having difficulty getting donors to give year after year
- Donor counts have been in decline for nearly a decade – but offset by higher per donor contributions
- More and more money is being spent replacing those "lost" donors
- So why is this happening?
- Competition is one of our greatest threats

Number of Nonprofit Organizations
in the United States, 2003 - 2013

	2003		2013		Pct. Change
	Number of Orgs.	Percent of All Orgs.	Number of Orgs.	Percent of All Orgs.	
All Nonprofit Organizations	1,369,123	100.0%	1,406,786	100.0%	2.8%
501(c)(3) Public Charities	783,811	57.2%	945,393	67.2%	20.6%
501(c)(3) Public Foundations	103,387	7.6%	96,759	6.9%	-6.4%
Other 501(c) Organizations	481,925	35.2%	364,634	25.9%	-24.3%

- 2015 Donor Loyalty Study**
- TOP CAUSES DONORS GIVE TO:**
- 1 Social Services
 - 2 Health or Disease
 - 3 Children and Youth Development
 - 4 Places of Worship
 - 5 Animal Welfare/Shelters
 - 6 Education

In Order to Beat Out the
Competition, and Win the Respect
we Deserve, we Must PROVE we are
Accountable
&
Ethical

What Defines Accountability?

- Questions to which you need to be able to answer "YES" for courtesy and accountability to the Donor:
 - Do they know where their money goes?
 - Do they know how much it costs your organization to raise \$1?
 - Do they know about your "gift tax," if any?
 - Do you provide them with financial reports?
 - Do you have an 'open door' policy where they can contact you with questions/concerns?
 - Do you track how they wish to be acknowledged?
 - Do you send them annual endowment reports?

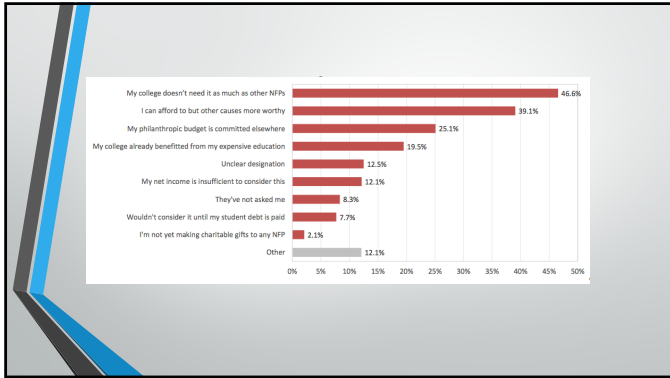
Donors are Demanding More Accountability

2010 STATE OF THE NONPROFIT INDUSTRY SURVEY:

- 42 percent of donors require updates on how their contributions are spent - *that's up from 30-33% in 2006-2008*
- 60 percent of donors require that their contributions be restricted to a specific purpose - *that is up dramatically from 36-42% in 2006-2008*
- 15% of organizations began proactive communication on how donations were spent last year - *brings the total percent of organizations doing this to 78%*
- 17% of organizations began proactive communication on impact of programs last year - *brings that total to 83%*

Donors Are Demanding More Data

- From a 2012 CoP article summarizing a Penelope Burk study:
 - "Charities don't do nearly enough to tell donors how their money will be used."
 - "Nearly half of the donors said that they had more money to give but held back. Many of them said that was largely because they had not received enough information about how past donations had been spent."



2016 Burk Donor Survey

DONORS WANT MORE DATA!

1 in 3 stated that they could have given more, "but didn't, in part, because they wanted more information on what their gifts would achieve."

DONORS WANT TO SEE RESULTS!

In 2011 results "mattered" to only 16% of respondents; in 2016 that had grown to 41%

What Does it Mean to be Ethical?

- Vered Will Show The Way!
