

How Annual Giving and Advancement Services Can Play in the Same Crowdfunding Sandbox Together (Without Kicking Sand in Each Other's Eyes)

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April 2017

In the fall of 2016 I wrote a piece I called, "[Day of Giving or Day of Pain?](#)" Its premise was simple. If you launch a crowdfunding initiative without first communicating and coordinating with your advancement services team, the effort is likely doomed to failure. Not a financial failure necessarily – at least from the perspective of bringing new money in the door. But an institutional failure, a donor relations failure, and a data failure. These days of giving are often responsible for bringing in as many new donors as dollars. But if you have not worked with Advancement Services well in advance of the launch, you may likely find a data bottleneck in getting new records created – thus postponing (and sometimes completely dropping) any sort of a timely stewardship initiative.

Why, just recently on one of the listservs I monitor someone – a Director of Advancement Services – had the gall to ask, "Given the nature of crowdfunding, we are thinking that we will receive many small gifts from new donors whose reason for giving is not because they have an affinity to the college, but rather because they want to support a student/friend who has reached out to them. Do we enter all these new donors into the database?"

SAY WHAT?

The mere thought that one of "my people" would even consider not creating a record for a new donor completely baffled me. But then I figured it out. Clearly the annual giving office had never bothered to work with advancement services in advance of the crowdfunding launch and, more to the point, had not had the first discussion about the importance and value of this new, rich, data and its long-term benefit to the organization.

While I thought I beat this topic to death in my previous article, I failed to recognize one very important bit of information: Lack of communication between Advancement Services and Annual Giving is *not* unique to crowdfunding. It's simply that crowdfunding is the latest/newest victim of this disconnect. Perhaps this historical communications chasm is the single most important reason that I so enjoy co-hosting the Meeting of the Minds conference every year with annual giving consultant/expert/guru/friend Bob Burdenski. The title for the conference is intentional. It is truly a meeting of the leadership minds from both the annual giving and advancement services professions. It brings together two groups that inherently (genetically?) can barely stand being in the same room together. This disregard for one another has been true since the beginning of time – or advent of direct mail – whichever came first.

But in today's fast-pasted, social media, new age, fancy-dancy giving vehicle world, it is imperative that we do what we had trouble doing in the past: Listen/Learn/Speak. Trainers and counselors call this "active listening." As part of my consulting practice I have provided conflict resolution or mediation services for over 25 years, largely focused on teaching active listening. Perhaps I should offer some of those pointers here.

Both the annual giving and advancement services professionals have operated for years with the wrong mindset when regarding the other. Advancement Services has always thought, “If we build it they will come,” and go out on their own to develop some sort of new technology or functionality in a total vacuum and then try to cram it down the throat of annual giving – when they never even bothered to simply ask the annual giving team, “What do you need?” And then they cannot figure out why annual giving won’t use the new tool.

Annual Giving, on the other hand, has always thought, “If we can think it, they can do it,” and come up with some new annual giving strategy or segmentation or fundraising platform and then try to cram it down the throat of advancement services – when they never even bothered to simply ask advancement services, “Can you do this?” And then they cannot figure out why advancement services can never do what they want.

Independent thought is great! But it is not always effective in today’s highly competitive world of philanthropy. The successful programs and campaigns are going to be those that do *not* think in a vacuum. Annual giving and advancement services *must* work together and absolutely *must* move away from knee-jerk thinking and move toward strategic planning. And most important on both sides of the fence we must stop simply saying, “No.” We have got to come to the table as active listeners. And once we have listened and learned, if what suggested is not entirely possible, we *must* willing and able to speak positively by saying, “Well, we cannot do exactly that for these reasons, but what if we did this?”, and then offer viable alternatives.

My preferred way of approaching the above begins with the joint development of an annual operating plan. Often, these plans do not encumber the other nor require action on the part of another unit. However, they do inform and educate. Advancement services can see the strategic direction that annual giving wants to pursue – and might even be able to offer some insights based on what they have heard at “their” conferences. And the annual giving folk can begin to appreciate that the world actually doesn’t revolve around them☺. They may hear about a new prospect management subsystem that needs to be implemented, or a planned giving tracking system that needs to be built, or an RFP that’s being developed for a new CRM.

But it is here, over a year in advance, that the notion of building a crowdfunding platform or trying out a day of giving concept will be first aired. The two teams, then, can work together to realign priorities or, if need be, decide to put a hold on one project (if the VP agrees!) to focus on this new initiative.

But active listening does not stop with the co-development of annual operating plans. Both teams need to meet on a monthly basis to listen and learn about what’s on the horizon. And to identify and discuss any roadblocks encountered on previously agreed upon priorities. Or to reshuffle priorities if circumstances have changed. The dialog must be ongoing and routine – and I mean **dialogue**. Forget the dreaded email threads that go on for 5,000 words. And AS/IT request ques be damned. That’s NOT communication. By golly, if something urgent comes up or gets in the way, PICK UP THE DARN PHONE!

Active listening. Planning. Communication. These are beautiful things. Try them. Your new crowdfunding platform – as well as any new fundraising initiative – will then surely be a success!