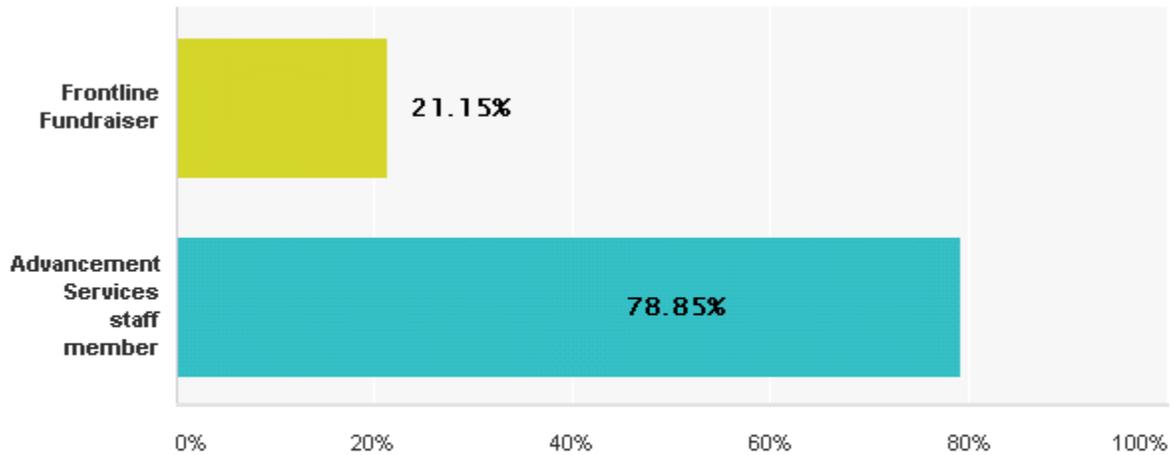


Frontline Fundraisers and Advancement Services Feedback

Survey Period: 8/18/13-8/31/13

Are you a Frontline Fundraiser or Advancement Services staff member?

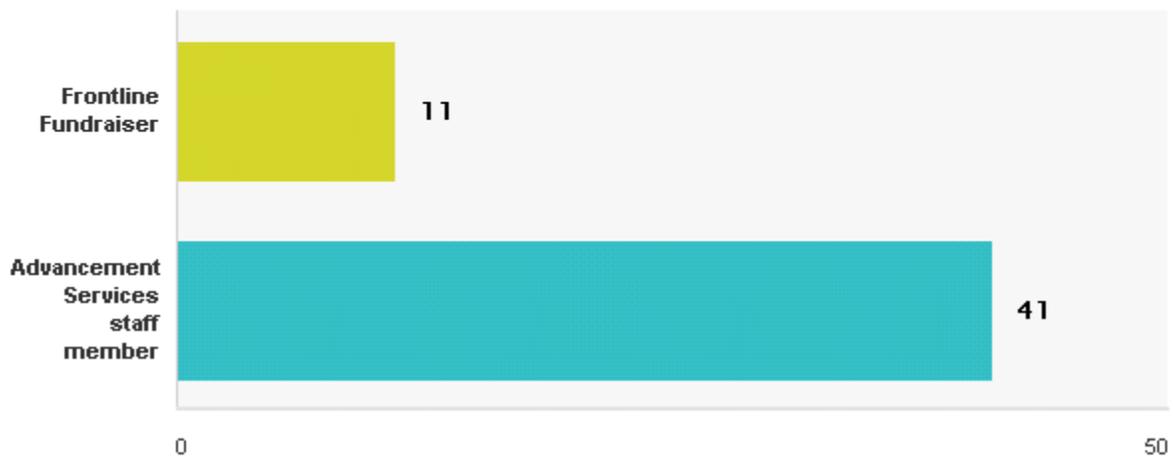
Answered: 52 Skipped: 0



Answer Choices	Responses
Frontline Fundraiser	21.15% 11
Advancement Services staff member	78.85% 41
Total	52

Are you a Frontline Fundraiser or Advancement Services staff member?

Answered: 52 Skipped: 0



2. What type of organization do you work for?

Answered: 52, Skipped: 0

Academic medical center - 2

Campus affiliated Foundation - 1

Community College - 1

Foundation – 1

Healthcare - 10

Heath and Education - 1

Higher Education - 9

Hospital -3

Independent graduate school/school of theology - 1

Large Community College Foundation -1

Liberal Arts College - 1

Medical center - 1

Non profit fundraising and grant making organization -1

Predominantly higher ed institutions and I was at a university before my most recent position with a hospital - 1

Private Catholic School Grades 6-12 - 1

Private college - 1

Private Liberal Arts College - 1

Private University - 1

Private, independent PS-12 college preparatory school - 1

Prospect Research - 1

Public university - 1

Regional teaching hospital - 1

School of Medicine - 1

State, land grant university but also do several of university's institutionally-related entities i.e., foundations

(501(c)(3)) which the foundation's reimburse the University for my time spent on their functions. - 1

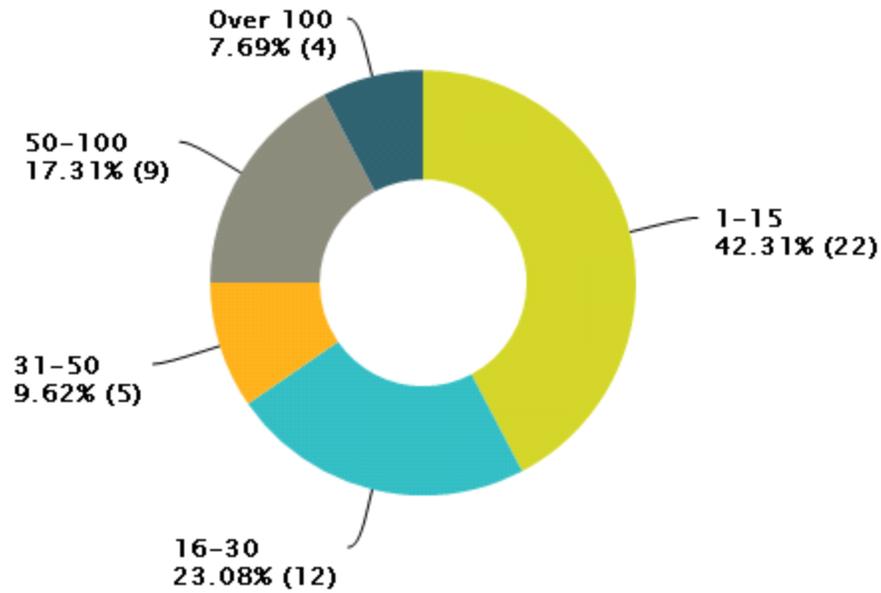
University - 5

University Foundation - 1

Wish-granting organization - 1

How many people are in your entire development office?

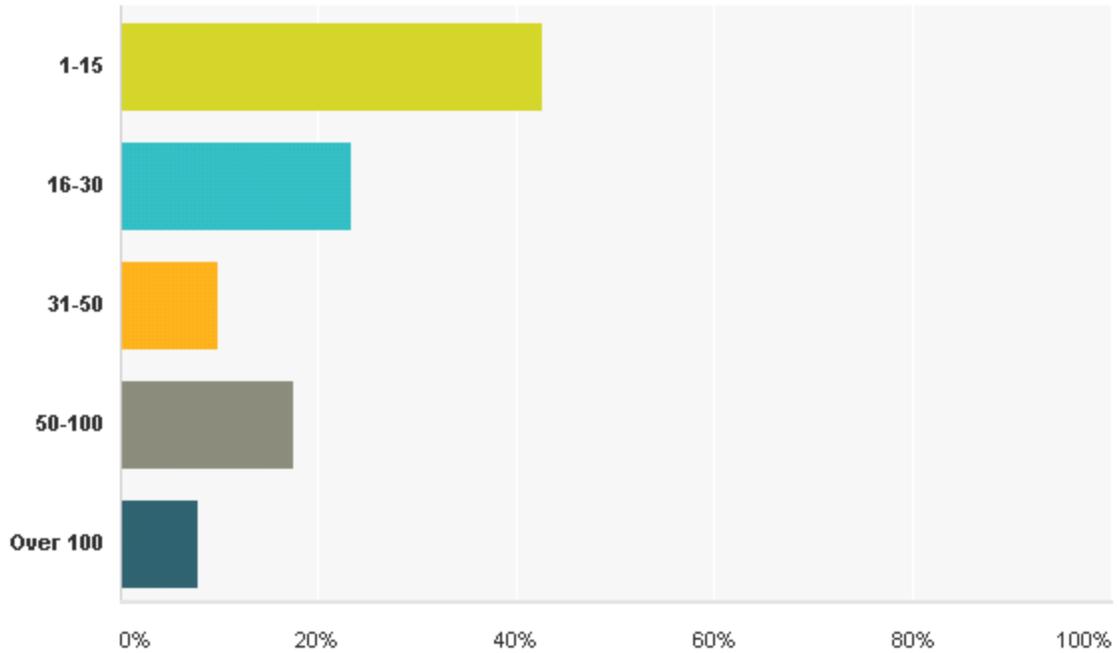
Answered: 52 Skipped: 0



Answer Choices	Responses
1-15	42.31% 22
16-30	23.08% 12
31-50	9.62% 5
50-100	17.31% 9
Over 100	7.69% 4
Total	52

How many people are in your entire development office?

Answered: 52 Skipped: 0



Answer Choices	Responses
1-15	42.31% 22
16-30	23.08% 12
31-50	9.62% 5
50-100	17.31% 9
Over 100	7.69% 4
Total	52

4. How many Frontline Fundraisers are in your office?

Answered: 49, Skipped: 3

1. 8
2. 3
3. 11
4. 7
5. 2
6. 6
7. 5
8. 20
9. 6
10. 5
11. 62
12. 11
13. 8
14. 4
15. 1
16. 7
17. 11
18. 30
19. 4
20. 28
21. 4
22. 15
23. 32
24. 9
25. 3
26. 14
27. 3
28. 4
29. 1
30. 11
31. 8
32. 20
33. 5
34. 15
35. 15
36. 7
37. 6
38. 5
39. 6
40. 3
41. 6
42. 80
43. 2
44. 5
45. 20
46. 8
47. 19
48. 1
49. 5

5. How many Advancement Services staff are in your office (not including gift processors)?

Answered: 51, Skipped: 1

1. 3
2. 8
3. 2
4. 4
5. 3
6. 1
7. 2
8. 3
9. 13
10. 2
11. 42
12. 3
13. 3
14. 3
15. 05
16. 3
17. 6
18. 15
19. 3
20. 8
21. 2
22. 2
23. 3
24. 7
25. 3
26. 1
27. 8
28. 2
29. 1
30. 0
31. 4
32. 5
33. 30
34. 4
35. 5
36. 75
37. 15
38. 3
39. 3
40. 3
41. 5
42. 7
43. 3
44. 15
45. 1
46. 1
47. 12
48. 2
49. 8
50. 1
51. 3

How do Frontline Fundraisers communicate their needs to Advancement Services?

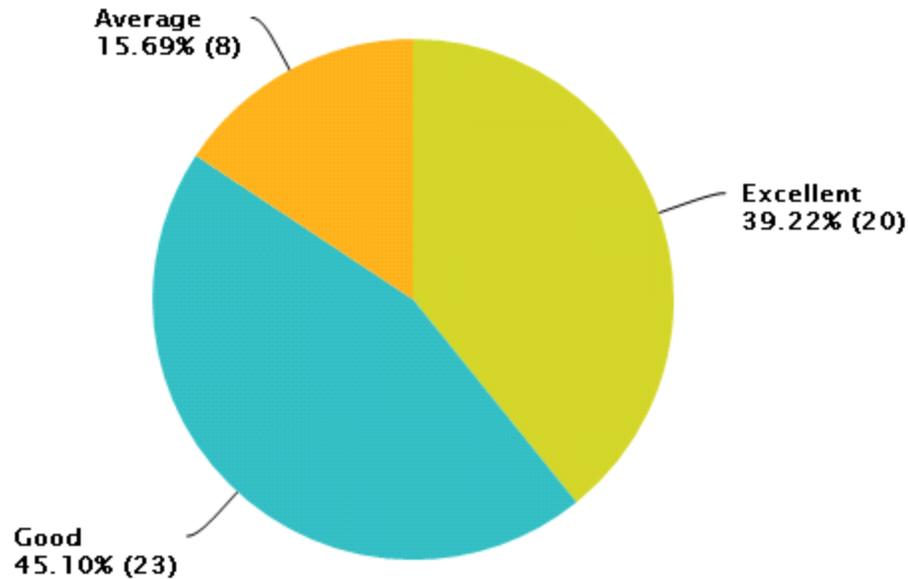
Answered: 52, Skipped: 0

1. Email or verbally
2. At weekly staff meeting with officers and daily through emails or calls.
3. Email, Forms (gift or list), face to face one off requests, regular status meetings
4. Email, phone, in person
5. Face to face mostly
6. Verbally or via email (preferred)
7. Phone Call, Email I'm working on a request form for research and updating the one for mailing lists.
8. Via email or phone. We are scattered across the state. Have a request form in development via our email system.
9. Primarily through email and less frequently in meetings
10. That has depended upon how AS has communicated the appropriate steps for requesting various services and has run the gamut of walking into the offices/cubicles, sending emails, making phone calls or submitting some form of "help" ticket/request (the last was in effect at the last university where I worked
11. Verbal/face to face, Email, and phone
12. Two main methods:
 - a. Development officers have support staff titled "Coordinators" who are a "hybrid-type" employee that have a basic to intermediate understanding of Frontline fundraising and its language and a basic understanding of advancement services and its language. Coordinators do the bulk of communications with advancement services on their behalf.
 - b. Constituency Development officers report to AVP that is on leadership team with AVP for Operations who also handles Central Development and has a direct report of donor relations, communications and marketing, and prospects and research. The AVP for Operations also has a dotted line report to advancement services of information management services, development accounting which includes gift processing, and endowment management.
13. verbally and email
14. in person, email, phone call... any way they feel like
15. via a system request database created in Access
16. None
17. email telephone in person
18. Email, phone and in person
19. Primarily email. Some sharepoint and about to implement AtTask
20. Verbally and email - we are all within feet of each other.
21. mostly through a centralized email address but they also call and drop in
22. email, meetings, phone frontline fundraisers: 1 75%, 4 25%
23. In person, email, phone call, data request form
24. E-mail or direct phone calls
25. Telephone and email typically.
26. via email, phone, in person
27. weekly prospect meetings, email, impromptu conversation
28. helpline
29. Emails Phone calls Face to face communication
30. in person and via email
31. I am frontline and advancement services with an assistant shared with alum relations, publicity/marketing and admissions
32. Via a Request for Service submission program in Sharepoint. Or email :)

33. verbally; email; edict
34. email, phone, or in person
35. Ticketing system (Spiceworks) for requests, also in meetings
36. We are all in the same office. We have once a week meetings and by email.
37. Not well. Half written Actions (we use RE), occasional Notes, deposit slips with gifts once in a while.
38. Via email
39. email/phone/face to face
40. Verbally, via e-mail, or, in some cases, completing an online form, i.e. for prospect research and soon-to-be for reporting requests
41. System request database. Services team members attend prospect management and pipeline meetings. Senior services team member weekly meetings with CDO / SVP. Adv Services, MG, and PM&R team members work on standardized reporting together.
42. email, in person and via the database
43. Non-siloed culture; ticketing system; open door policies
44. email requests, forms for specific asks, Access database, BBCRM database
45. ineffectively both ways. No formal lines of communication
46. email; in person
47. Via email and meetings
48. Depends on what the need is. Report requests (self-service reports or otherwise) are made through online form. New data fields/data projects are communicated initially in meetings. Research requests come via email mostly. Lots of meetings about other needs.
49. email or informal conversation
50. Usually via email
51. We talk to each other.
52. email, and face to face

How would you describe the relationship between Frontline Fundraisers and Advancement Services?

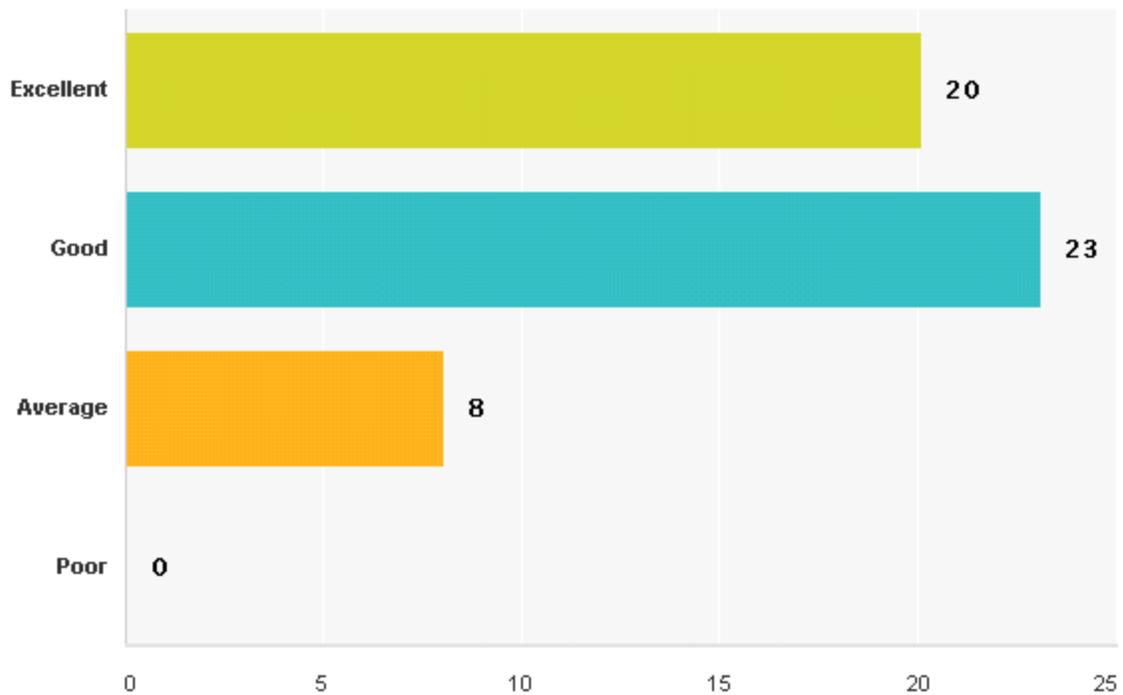
Answered: 51 Skipped: 1



Answer Choices	Responses	
Excellent	39.22%	20
Good	45.10%	23
Average	15.69%	8
Poor	0%	0
Total		51

How would you describe the relationship between Frontline Fundraisers and Advancement Services?

Answered: 51 Skipped: 1



Answer Choices	Responses
Excellent	39.22% 20
Good	45.10% 23
Average	15.69% 8
Poor	0% 0
Total	51

8. What are some ways in which Frontline Fundraisers and Advancement Services effectively work together in your development office?

Answered: 46, Skipped: 6

1. More training as well as more information in general on upcoming changes that will impact frontline fundraising. Changes happen in database directly related to Moves Management that fundraisers don't know about until we ask for clarification.
2. We work really hard to build trust. Trust builds communication. We make opportunities to connect and talk about what's going on. Some of the best information is discovered in the kitchen.
3. When time allows, problems are identified and the team works together toward a solution.
4. Planning together, talking through "wish we could" scenarios
5. With younger development officers there is a much lower learning curve when it comes to technology, so these young officers are quickly able to identify better ways of doing their current tasks and they have no hesitation to ask us for more training
6. Being part of the planning on the beginning stages of a project. Presentation of timeline or need by dates in requests. Creating standards for information flow bi-weekly meetings.
7. Prospect Mgmt/Moves Mgmt. Managing our pipeline and prospect/donor cycle. All new processes and metrics surrounding everything and a new environment/culture for most.
8. Shared goals and mission
9. In almost every AS position in which I've been employed, I have been called upon to coordinate efforts with fundraisers on a wide range of questions or concerns including ensuring IRS compliance with gift acceptance and receipting, drafting gift and pledge agreements, assisting with the enhancement of matching gift programs, interpreting reporting requests to systems/reporting staff on behalf of various fundraisers, creating and refining queries for fundraisers to run (or have run for them), developing dedicated online giving pages, and a wide variety of other services
10. Twice monthly staff meetings; travel coordination for annual regional gatherings; twice monthly reporting
11. We have excellent leadership in our VP and the Association VPs all of whom believe that Advancement Services are part of the team effort especially when it comes to stewardship. They have incorporated Advancement Services into the communication circle and it has tremendously helped in breaking down lack of communication, miscommunication and ignorance. It has enlightened frontline fundraisers to Advancement Services' functions and relevancy. For Advancement Services, it has helped us better understand the fundraising job which helps us help them, thereby increasing everyone's effectiveness and efficiency. From what I've heard of other institutions, we do fundraising events well...mind you not perfect but superior compared to other institutions. I believe that this was the direct result of Advancement Services' initiative to educate the Coordinators and the Frontline Fundraisers of do's and don'ts while working with them to specialize their events to their constituency's missions, strategies, etc. A lot of one-on-one interaction through the phases of planning and it has paid off.
12. Participation in the Pipeline and Prospect Planning Meetings are very helpful to be kept informed on current MG prospects. Weekly meetings w/Frontline Fundraiser to review & update steps on MG Prospect plans. Meetings with physicians and donors on Outlook Calendar – prompt staff member to update MG prospect plans and request contact reports
13. Gift documentation (endowment MOUs, pledge documentation). Often, fundraisers will consult with development services as they negotiate the gift. Endowment updates. Fundraisers are the main contact for most of our academic units. They work with departments to get updates that development services works into the donor updates. Fund information. Development Services provided consolidated fund reports (we have four foundations) for each academic unit, and the fundraisers help us distribute information about the fund balances to the departments.
14. Two of our frontline fundraisers have a varied background where they have done some database work, so while that is not their thing, they have an appreciation for it and a sense of how much work, for example, creating a report, requires. This greatly helps how we work together. The other frontline fundraisers are out of the office a lot and barely go in the database, while they rarely have requests, when they do it, they want it

asap. I will say our prospect management team is very involved in the database and we work together a lot; they have a lot of requests that usually end up in the hands of the MGOs. We also have a "Reports Group" that meets every two weeks that consists of an MGO, a Corporate/Fdn fundraiser, Director of Prospect Management, and Ops staff - this has been helpful in allowing us to talk through new reports so that they are useful to multiple users, rather than specific to one user.

15. With a one person shop, they get along beautifully.
16. Frontline fundraisers know the database well enough to be able to communicate effectively.
17. Monthly rotating training sessions and open drop-in times for questions related to technology and services.
18. Open communication is key. We are implementing moves and portfolio management which should help with metrics we are developing. It's a team effort.
19. We have one main "gift processor" and she works for Frontline fundraisers and with us on the Advancement services staff. We are one cohesive team. I think that is one reason we work well together.
20. We are included in every general/planning meeting at the onset of any mailing, event, or project
21. Prospect management, data used in analysis
22. We recently started meeting before a big solicit to make sure all data needs are clear
23. Good relationship regarding matching gifts
24. Engagement in the process of report development, not just a request and result.
25. Advancement Services provides quick responses to questions, issues.
26. Feel there is good rapport, open communication & a willingness to work together to accomplish all goals.
27. Fairly good communication. Recognition that the team has a common goal. Frontline uses the helpline to make requests. Frontline uses the built in email alerts in the database.
28. Providing us a calendar of mailings Passing along biographical data
29. A small office with a database in dire need of attention and a lot of information warehoused outside of the database (read: in people's heads) forces both groups to work together to get the job done.
30. It really depends on the individuals. Certain folks are really easy to work with and communicate with. Others are not. It seems to be more about personal work styles than "Advancement vs. Development."
31. Discussions about needs and limits of the systems and manpower
32. Communicating information ie donor intent or requests.
33. We bend over backwards for them
34. Collaborate on gift & pledge agreements, fundraiser drafts the agreement, Fund Adm cleans it up & finalizes.
35. Good communication.
36. Very collaborative on discussion and creation of donor designations. Timely notification of receipt of major gifts, whether in the services group or the MG group. Often hold discussions of details of particularly complex gifts before the solicitation has formally been made to make sure all groups are on the same page. Adv Services, MG, and PM&R staff often meet about projects together in the formative stage
37. Prospect strategy, developing policies and procedures, documentation, database application development
38. Creating reports; optimizing the database; creating research profiles and stewardship reports
39. Good communication skills, valuable contributions to each others' departments & respect expertise of both.
40. Form a non-partisan committee to discuss organizational and departmental prioritization of projects.
41. Good communication and feedback. Advancement services is always makes herself available and answers all questions in a teaching method so that we can become more self sufficient.
42. Head of programming team is proactive in talking with fundraisers, going to lunch, hearing their frustrations etc. Head of research team does lots of 1:1 training, re-training of fundraisers on prospect management system, contact reports, etc. Head of advancement services networks well with fundraisers, understands their needs. The right people are (eventually) included in meetings to address new initiatives etc.
43. Pledge communication and acknowledgements work well
44. Information exchange..data updates...Prospect management
45. Constant communications.
46. through education of what AS needs to have great data we continue to help them understand our needs and then we are able to provide for their needs

9. What are some of the challenges that exist between these two areas in your development office?

Answered: 50, Skipped: 2

1. Lack of proper communication
2. Balancing gift processing urgency with frontline fundraising needs.
3. Timing. All of the sudden a mailing needs to go out and they forgot to request a list. In some cases, the fundraiser wants to try it him/herself and forget to loop my office in. There is also a disconnect on what it takes to complete a request. If I have questions, then it's going to take more time.
4. Not enough advanced notice for too many priority projects, different skill levels of advancement staff, overall comprehension of frontline staff is sometimes limited
5. Speed! Frontliners need everything QUICK -The services people are much more detail oriented and the frontliners are more relationship oriented. Some clashes there.
6. There is still the tendency for development officers to keep their notes and call reports out of the system. We recently found our foundation person has an entire spreadsheet of potential foundations. NONE of them were added to the system. When that happens, they don't seem to realize what a challenge it is to then report the effectiveness of our fundraising efforts. When a donor only gets into the database when they make a gift, that falsely inflates your response rate.
7. Making sure that I am remembered at the beginning of a project. Forgetting that I have a schedule or plan and that I have projects that are not just for the fundraisers but for the institution (VSE survey, database management, etc)
8. Some are adverse to change and having to document everything where others are gung-ho and ready to take the next step. Hard to please all levels of buy-in.
9. Lack of understanding each others areas; difference of opinion when it comes to prospect management
10. I've found over the past decade that where there used to be more distinctive lines of demarcation between fundraisers and development support staff that now there is much more overlap and less real distinction based on our use of technology. While there are still those whose primary responsibilities remain focused on asking constituents for funding and other support, in point of fact other fundraising areas which deal with some of the bulk fundraising efforts (as with online giving, matching gifts processes and - in some cases - even the annual giving area) are managed through the advancement services area. If I had to come up with a challenge, it might be that even in our heavily technology supported/driven times there are still occasions where managing fundraisers' expectations for turnaround time of report production and some related information management requests can be problematic - if we've done our jobs and enabled fundraisers to be as independent as possible then the challenges tend to be fewer and further between
11. Gift officer and VP orchestrating the work that is to be accomplished on the services side – essentially treating staff like secretaries; wanting to manage the ‘entire’ project and leave the menial tasks to services; lack of support for created processes and procedures for standard duties, projects and events.
12.
 - a. Based on the experiences that Frontline Fundraisers bring with them to the job, they generally have the belief that Advancement Services are a necessary evil that is problematically bureaucratic rather than believing that we are their best champions and part of the solution to their problems. This is a culture that we trying to change.
 - b. Logistically, the Frontline Fundraisers are located in various units throughout campus while some Advancement Services are located off campus due to lack of facilities
13. Following up & verify completion of “next steps” for MG prospect plans
14. Fundraisers often circumvent processes and work around development services. When they later come to development services for information, we don't have it because we were not included. This results in a great deal of frustration, more work for development services and bad feeling between the two offices.

15. So much work that Ops does is behind the scenes, so some staff do not have any idea of how busy we are and so when they have a request, they think it can be done in a day or two. And people always complain about the database; they don't realize that issues and bugs are going to pop up wherever you work, with whatever database you're using. The grass is always greener...
16. Not enough staff to achieve development goals.
17. Lack of time to integrate some of the processes we want to put into place.
18. Staff turnover in the fundraising arena; understanding the needs we have are primarily IRS needs (not our personal wants) - ie. documentation of pledges;
19. Ensuring that contact reports are completed and information gleaned is communicated so the database can be kept up to date.
20. None - our main problem is the working with Finance. They are the ones that we have much more challenge working with.
21. Getting them to define what they need better. Getting them to plan further ahead so there are less last minute requests
22. Frontline staff doesn't plan well and requests are generally last minute
23. ASAP last minute projects that are requested with no forethought so there are many reruns of the data adding more criteria since it wasn't thought through at the beginning. Lack of planning in many areas such as not asking for a solicit or a fund code to be set up in advance. Not including Adv Svcs in the advance planning so we can have input in such things as QPQ appeals, etc.
24. Reclusive gift processing and advancement services staff. Frontline staff complain they don't know them nor understand who does what
25. Short timeline, emergency requests due to lack of planning.
26. We are working on documenting processes, data standards.
27. As a single staff member with responsibilities for prospect research, stewardship and database processes, the challenge is to provide support for an expanding staff of frontline fundraisers.
28. Advancement Services needs the frontline and/or their support staff to run reports and mailing lists that are set up in the database. The central office is not staffed to handle all the requests that the end users should be able to do. Training is readily available.
29. Last minute requests. Not passing along data as they receive it see above. Also there is often the assumption that because one person knows something, everyone knows it, even when that is often not the case. It is hard to un-silo information.
30. None
31. When the DO's put together actions plans without consulting on how those plans will affect Advancement (add more work to an already overflowing plate). The DO's would say they have the most difficult time with our reporting and not understanding it - and I would have to agree based on the current personnel that we have working in that area. We have communication issues a lot because the DO's don't understand how to ask for what they want, and our current Adv Director doesn't understand the inner workings of Development enough to know how to help.
32. Speaking the same language; effective communication
33. Understanding each other's needs and challenges
34. There is a lot of tracking of donor contact on personal spreadsheets that isn't entered into our database until months after it happens. It can create issues if someone else talks to that donor and doesn't know the history.
35. DO's think they are done with a gift the moment the gift agreement is signed, that it will automatically show up on reports and boost their metrics. That there are annoying little gremlins that have to enter the gift and they need information in order to do that correctly is just a frustrating hurdle in the way of making the numbers look better. If they would just spend a few minutes to think about what fund the gift is going to and communicate that or start the process of setting up a new fund, things would go a lot smoother and faster.

36. Only including Advancement at the end of a process so communication can be an issue. Development not realizing that Advancement is here to assist. Advancement services is not trying to usurp any stewardship or communication but sometimes it makes more sense for Advancement to reach out to the donor to ask questions rather than wait for the fundraiser to make the call.
37. Front line fundraisers may be too dependent on AS staff to run queries and reports in the database.
38. Frustration on the part of frontline fundraisers by asking for something on too short of a timeframe which can't be delivered. One thing I've learned in Advancement Services over the years is that our job is a huge balancing act, or, maybe, more accurately explained, a huge juggling act: too many requests/special projects for the staff available to work on such tasks.
39. Some donor and prospect information is still maintained outside the system. No policy of measurement for making sure all MG info is entered into the system. MG officers are not inclined to enter the info. Have people to meet. Fundraisers have expectations of ease-of-reporting that the system cannot provide. Working spaces of Ops and MG staff are physically separated. MG staff seldom visit Ops area (unless there is food in the Ops area.)
40. Time and staffing constraints; prioritizing tasks
41. We need more frontline fundraisers to make a lot of our systems actually work well
42. Sometimes advancement services confuses front line fundraisers by speaking and thinking above the knowledge level of the front line fundraisers. In other words, we have no idea what they are talking about sometimes or why a request is more difficult to handle than others.
43. There is a huge gap in communication
44. No challenges about working together, just volume of work that needs to be accomplished and having one advancement services person.
45. Huge amount of systems projects and reports without opportunities for prioritization, or "should we be doing this?" Fundraisers are burdened with lots of tracking/reporting, frustrated about the time involved, less time to raise money; programming staff is burdened with constant new programming, new data fields, etc. Some fundraisers are very low tech, needs lots of repeated hand-holding.
46. Many times the development members will send out a solicitation without a complete pledge/gift card. Missing Constituent ID or appeal code. There are times when we don't know these mailings have gone out until we receive the card to process the money.
47. Timeliness of information...not all DO's are as cooperative as others.
48. We, honestly, do not have any. Probably because there are just two of us.
49. FF don't always understand the importance of gifting regulations, and the importance of written documentation