

**What's Wrong with Advancement Services?**  
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Quite often, I am hired to go in and “fix” an Advancement Services department. I am typically hired by the fundraising office who thinks Advancement Services – only rarely by the Advancement Services unit proper. What I find is that it is not the department that is broken, but how an organization has – or has not – allocated resources and made use of that department. In addition, it is not always about not spending enough money on the “back office,” although that frequently is the case particularly when it comes to salaries. More often than not, the core issue is not elevating the stature of Advancement Services to being on a par with the fundraising/development department. Here are some common problems to look for when hearing that Advancement Services is broken:

1. Advancement Services has been scattered to the wind. In other words, units that commonly comprise advancement services are in bits and pieces spread throughout the organization – and not necessarily even within the Advancement division. If you see that IT is totally centralized – with no separate Advancement IT group (*not* just report writers), or that the gift processing function is over in Finance, or gift processing and bio and in completely different departments, expect major issues. A single Advancement Services unit should encompass all of the Advancement support functions. While it can vary, at the very least this department should house: Gift Processing; Biographical Data Entry/Integrity; Information Services (report writers & programmer/analysts); Prospect Research & Management. More often than not, this department also includes: Development Communications; Donor Relations & Stewardship; Events; Divisional Finance & HR.
2. The leader of the Advancement Services unit does not report to the Vice President/Chancellor for Advancement, nor do they have the same title as the other senior direct reports to that office. Moreover, frankly, that “leader” really is not so much a leader but a follower because of their low relative status. So often Advancement Services is treated like “the back office.” While they are not out “front” raising money, their role is equally as important. They need to be at the table with all of the other direct reports, particularly as strategies and budgets are being developed.
3. The Advancement Services organization has a “We’ve always done it that way” attitude. When I go in to conduct a review, it is amazing the extent to which unnecessary functions are layered on top of each other. Look for things like manual incoming check/gift logs; photocopying of checks; limiting bio data updates to only one group; batching gifts based on the type or size of gift, or department receiving the gift; entering “gift dates” based on postmarks; etc. These are “old school” ways of doing things. They would likely have gone away years ago if the staff still performing these tasks had benefited from Advancement Services professional development. Make sure you compare their PD

budget to those of the fundraising staff – and not just budgets but actual attendance at conferences.

4. Not letting the system work for you. Rather, you working for the system. Many of the silly tasks listed above come about because no one was given the opportunity to sit down and figure out a way to let the development system automate manual functions. This is why it is imperative that the IS shop be within Advancement Services. These “fixes” are not as easy if there is not a high-caliber technology staff on board. If not, then there should be funding every 2-3 years to bring in a technology assist from the vendor to fine-tune the system.

If you can get the organization to address these common problems, what is “broken” will get fixed in a short period without spending a ton of money.