

# Building Partnerships within your organization

Development & Finance

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# Misperceptions, vague judgements and lack of understanding

- ▶ Fundraising is all about parties and lunches while Finance is just a bunch of worker bees who don't care about relationship building.
- ▶ Finance hoards the money, Development spends it.
- ▶ Neither department has time to care about the success of the other.
- ▶ The other department should just stay in their own lane, they don't understand/value what we do.

What are things you've noticed or felt?

# Why does a strong interdepartmental relationship matter?

- ▶ It makes for a more efficient working environment.
- ▶ Furthers the mission through collaboration.
- ▶ Builds staff satisfaction, good working relationships equal happier more productive staff.
- ▶ Reduces risk; fewer things fall through the cracks when everyone is clear on their role in the process.
- ▶ Provides reassurance and a cohesive representation for donors/stakeholders when donations are accounted for and well stewarded.

# Contributions of each department

# Let's talk about the language for each department.

- ▶ What is shared and what is unique? How does it affect communication?
- ▶ Discuss what is meant when referring to account codes and what is meant when referring to fund IDs. What does a verbal pledge mean to Development as opposed to Finance?
- ▶ Give a high level overview of the term each department uses within context of fundraising and financial accountability.
- ▶ Talk about the difference between attainment and income, especially when it comes to multiyear pledges.
- ▶ Review how fundraising goals affect budget items and how each can be structured to provide reliable forecasting; discuss how this can set the tone for both departments moving forward. Include discussion on how gift tables function for planning.

# Roles between both departments as they pertain to the lifecycle of a gift

- ▶ Assess and document current practice - Who receives gifts? What information do they capture? Where does it go next? What is the timeline for deposit and acknowledgement? How is the gift accounted for and verified? Do you reconcile on a regular basis? If so, who is responsible for that process? Who manages invoices?
- ▶ Establish the needs for both departments when it comes to pledge, payment and donation forms; then build templates that reflect those needs. Do this for online forms as well as mailed solicitations.
- ▶ Once current practice is documented, work together to find efficiencies for both departments. Share the burden rather than waiting for “someone to do their job”.
- ▶ Build a schedule for regular reconciliation (monthly is recommended). Work together on how to efficiently use fundraising/ accounting software toward making this process reliable.
- ▶ Meet quarterly to discuss pledge statuses and other money management items such as peak expense times (esp. around event spending) and peak income times (year end, event deadlines, Board payments due).

# 990s, audits and record keeping - roles, needs and wants

- ▶ Prior to audits, review record keeping practices for both departments. Who maintains original pledge documentation? Are you able to show continuity among documents held in both departments? Exe: if donor intent changed on a gift after it was deposited, how does each department reflect that change?
- ▶ If possible, work with auditors to get a list of items that may be prepared prior to onsite work. Review previous audits to get an idea of what was need and who may have provided that information
- ▶ Meet in person to discuss who in each department can take specific items and add to a shared folder; include deadlines to curb last minute scrambling
- ▶ Use a shared network folder(s) or dropbox so that everyone is able to add materials as they come in then be sure the naming conventions for the documents are clear. Once you have final materials, label them accordingly and archive previous versions within that folder.
- ▶ Have a post mortem for audits to review what challenges may have occurred or what process really helped make things go smoothly
- ▶ Create and maintain accounting/fundraising manuals at a high level. Use these to capture the logic behind coding structures and reconciliation between the departments

What next?



# Steps for relationship building

- ▶ Share what you do in your role, listen and discuss how that may impact the work of others. Don't assume what you or they do is obvious or unimportant.
- ▶ Don't play the blame game! Establish a process, clearly communicate it then stick with it. When a misstep happens, explore solutions for improving the process then do it and move on.
- ▶ Recognize that the busy times of one department may differ from the other and when they overlap. i.e. year end is crunch time for ALL of us so let's try to prepare wisely.
- ▶ Check in during "downtimes" to build a stronger relationship during busy times (year end, events, major gift campaigns)
- ▶ Talk to each other! Give each other grace in stressful times and celebrate your successes.

Let's talk!

# Experience sharing (audience participation)/ Q&A

- ▶ Discuss a time that you really saw the impact of poor communication.
- ▶ Discuss a process that you've found really helped bridge the needs of both departments.
- ▶ What misconceptions have you held about the other department and how were they dispelled?
- ▶ Think of ways that your departments can engage outside of peak times.

Thank you for listening and sharing!

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