

Track: Fundraiser / Development Officer

# What's Working (and What's Not!) in Annual Giving:

## A Community-Led Deep Dive

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### SPEAKERS

**Kushal Dasgupta**

Kindsight

**Adam Compton**

North Carolina State  
University

**Yoon Y. Van Hout**

University of Florida  
Advancement

**Mandy Ray**

Washington University in St.  
Louis

# Annual Giving is Becoming More Connected and Complex

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**01** Moves beyond a stand-alone calendar of appeals.

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**02** Requires earlier, stronger cross-functional partnerships.

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**03** Depends heavily on shared data, systems, and workflows.

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# How Does Your Work Intersect With Annual Giving?

Select all that apply

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☐ Advancement services or operations

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☐ CRM, data, or governance

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☐ Reporting or analytics

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☐ Gift administration

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☐ Technology or integrations

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☐ Communications or marketing

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☐ Annual giving or frontline fundraising

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☐ Other



# Meet the Moderator



## Kushal Dasgupta

VP, Delivery Strategy & Enablement at  
Kindsight

Focus Area

Delivery strategy and enablement



# Meet the Panelist

## Adam Compton

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**Role:** Executive Director of Annual Giving

**Institution:** North Carolina State University



# Meet the Panelist

## Yoon Y. Van Hout

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**Role:** Executive Director of Annual Giving & Donor Experience

**Institution:** University of Florida



# Meet the Panelist: Mandy Ray

## Mandy Ray

### Role

Executive Director, Annual Giving Programs

### Institution

Washington University in St. Louis



**What has changed most significantly in annual giving during the past three years, and how has its role within advancement changed?**



**Which data sources and integrations have moved from nice to have to essential for annual giving? What becomes difficult when they are not connected?**



**Where have you seen  
segmentation, personalization, or  
AI create meaningful value? Where  
has the complexity outweighed the  
benefit?**



**What institutional capability, not simply another tool, should organizations begin building now to prepare for the future of annual giving?**



**What does it look like when advancement services moves beyond fulfilling requests and helps shape annual giving strategy from the beginning?**



# Progressing From Broad Segments to Individualized Engagement

## The Personalization Path



### Live Poll

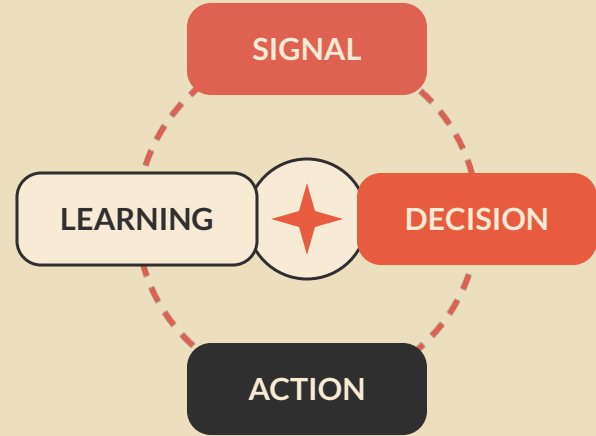
What is the biggest barrier to more responsive and personalized annual giving at your institution?



# Build Institutional Capabilities, Not Just Another Tool

The Capability Loop: Signal → Decision → Action  
→ Learning

- ✦ Turn donor signals into coordinated action quickly.
- ✦ Connect data to shared definitions.
- ✦ Establish reusable workflows and clear ownership.



# Advancement Services Must Become a Strategic Partner

## Phase 01

### Request Fulfillment

Driven primarily by incoming fundraising needs.

Focus is placed on reactive execution and transactional task fulfillment.



## Phase 02

### Collaborative Planning

Characterized by proactive, mutual shared planning.

Connect technical investments directly to high-priority fundraising use cases.



## Phase 03

### Strategic Partnership

Co-designing a robust, repeatable, and **scalable solution**.

Fostering institutional growth and continuous **learning** as a true organizational ally.

# Start With the Partnership, Not the Platform.

Success depends on flexible infrastructure, reusable processes, clear governance, and shared learning.

**Reflection:** What is one system, structure, or partnership improvement your institution should begin working on now?