Metrics have become a cornerstone in development office strategy. Our 2010 Points of Practice entitled, “Metrics that Matter” (http://bit.ly/1FofVKe) reinforced the idea that metrics need to extend beyond superficial measurement. In 2014 we surveyed fundraisers on metrics, this time on integrating other elements of engagement, competition, and performance.

We stepped away from defining the “art and science” of fundraising for an individual and thought more strategically about how institutions relate to those individuals and set them up for success, seeking to understand other factors that influence and inspire fundraiser performance. In the 2014 survey of 660 frontline fundraisers we found that:

- Metrics remain diverse across institutions.
- There is great opportunity for fundraiser growth and improvement.
- Competition for and retention of fundraisers will continue to be challenging.

### Metrics Remain Diverse Across Institutions

In 2005 and 2009, BWF completed intensive surveys of frontline fundraisers on metrics and performance. What we found then was that institution size and type made a great deal of difference in which metrics were tracked and how goals were set. Now we see that this diversity is still very much present across the development world; but there are several key metrics that are fairly consistently tracked:

- Total dollars raised.
- Total number of face-to-face visits.
- Total number of solicitations.
Past Common Metrics (2005 and 2009)

Current Common Metrics (2014)

**2014 Metrics**

Dollars, visits, and asks represent the core of where frontline performance is most visible: successful solicitations and meetings with donors. In the past 10 years, the most notable shift on a macro level has been a de-emphasis of “moves” as a primary metric, placing a higher value on face-to-face visits and solicitation. Two-thirds of fundraisers are expected to make at least 40 solicitations in a year (3+ each month), out of 8+ visits each month. These two numbers help create a big picture of typical fundraiser activities, but don’t necessarily communicate or reflect strategy in fundraising. On a micro level, however, we have witnessed many institutions elevating the complexity of metrics in order to seek to capture strategy as well as behavior. Some of the new metrics emerging include:

- Average timing between first visit and solicitation.
- Percentage of portfolio assignments visited.
- Proximity of solicitation amount to wealth screening capacity.

However, none of these trends illuminate the perceptions of metrics and goals by fundraisers. Effective goal setting is only partially about the appropriateness of the goals themselves; goals must be accepted and owned by team members to be effective. Over 50% of surveyed fundraisers believe that their goals (for individuals, teams, or both) are inappropriate, while 40% believe their goals are appropriate. Similarly over 42% of fundraisers view their metrics as detrimental at worst or ineffective at best in reflecting important behaviors.
Perceptions of Goals and Metrics

The root cause of why 60% of fundraisers find these goals inappropriate is unknown. Those who are dissatisfied might have weaker types of goals and metrics at their institutions. Or it’s possible that low performers are those who feel the most at odds with goals and metrics. Ultimately, however, the lack of fundraiser satisfaction with goals and metrics is a result of a disconnect between what team members and management/leadership believe to be prioritized activities and capacity of individual time spent.

There is Great Opportunity for Fundraiser Growth and Improvement

The gap between manager-set goals and fundraiser perceptions can be filled at least partially through goal revision, but our data points to another, more preferable option. Rather than adjusting or lowering goals, institutions can rethink and improve how fundraisers spend their time and the tools they have to maximize their results.

Time Management and Fundraising Success

The first evidence of this opportunity for growth is the disparity in time management we found in our study. Fundraisers in reality are simply not matching the expectations of time spent on major gifts set out for them.
Looking at the chart on the bottom of the previous page, one can see that while 55% of fundraisers are expected to spend over three-quarters of their time on major gifts, only 36% actually come close. Less than one-third of those expected to spend all their time on major gifts are able to do so.

What gets in the way of fundraisers spending more time on major giving? Other office and administrative responsibilities. The top response for where time was spent outside of major gift work was administrative (70%), with a second tier of non-major gift activities consisting of team and program management (52%), events (46%), and support to deans/units/programs (43%).

Development and major gift officers do provide extra bodies in already stretched offices, this is true. But considering that every hour not spent on major gifts can have an opportunity cost of $1,000+ (based on a giving income goal size of 1M+), utilizing fundraisers in administrative functions is a costly temptation. Especially in decentralized programs—where fundraisers are located in units that may or may not heavily prioritize development—development officers are likely to receive conflicting priorities for their time between the central fundraising program and deans, division chairs, or program officers.

Professional Development and Strategic Growth

BWF has conducted a decent amount of research into the performance curve of frontline fundraisers, finding that high performers are both scarce and well beyond their peers in outcomes. The differences in institutional metrics and goals of high performers and their peers are not significant; the ratio of high performers is fairly consistent across large programs.

To think about growing capacity, then, development managers have to build strategy to move all levels of performers up along the bell curve.

The good news is that fundraisers across the board and across number of years of experience want and value professional development (see Professional Development Opportunities chart below).

For many, however, professional development must extend beyond conference attendance and occasional sessions. The top three areas fundraisers identified for desired professional development were:

- Team management and leadership skills (58%).
- Planned giving and GIK (43%).
- Portfolio management and prioritization (42%).

There are generally three tiers of professional development: skill building, strategic thinking and activities, and individual leadership and initiative. Technical knowledge (planned giving and GIK) can be improved and grown through classroom experiences; but the other two areas (team management and leadership skills and portfolio management and prioritization) require an ownership of the development of both thought and behavior by team members and their managers. Institutions thus face a heavier burden of providing professional development experiences that reach this desired higher level of growth. Investing in your team is worthwhile, as the development talent pool continues to be shallow and highly competitive for employers.
Competition for and Retention of Frontline Fundraisers Will Continue to Be Challenging

Our research also partly confirmed something we already knew all too well: talent continues to be a top challenge for development programs of all shapes and sizes.

Why Is Finding and Keeping Fundraising Talent a Challenge? What is notable is that the most common factors thought about in recruitment and retention are not the driving forces behind the competition. Most fundraisers, regardless of years of experience, view their salaries and/or overall packages as competitive. Similarly, a majority (57%) of fundraisers are looking to stay at their institutions at least in the short term. Few report that they are passively open to new opportunities; even fewer consider themselves actively searching.

So if it’s not uncompetitive compensation and it’s not a large portion of ambitious individuals actively seeking new jobs, what is driving retention and recruitment challenges? Simply, overly high demand. Development shops have been growing rapidly, but the talent pool has not been subject to similar growth. All fundraisers, regardless of level of experience or length at an institution are being recruited. As a result turnover draws from not only the 10% of fundraisers actively searching for new positions, but also the 21% passively open to recruitment, and even those reporting they are looking to stay at an institution but do not see advancement opportunities internally.
Why Do Fundraisers Leave?
How do institutions retain their fundraisers in the face of this reality? BWF research also sought to unravel strategy by looking at both drivers of engagement and factors that might cause fundraisers to leave. What we found was that approximately 80% of fundraisers consider themselves to be satisfied in their job. Their rationale for satisfaction was consistent with previous assumptions and evidence of what motivates fundraisers: mission, community, and office culture.

If you look at the 20% of fundraisers who were dissatisfied, there are glimpses of different drivers and factors in retention. Office culture is again a top factor, but the issue that far exceeds all others in dissatisfied employees is leadership. Fundraisers may love an institution, but if they do not feel supported or heard by leadership, particularly their direct managers, the love of an institution will not be enough to stay.

A development shop’s objective then must be to build the relationship between manager and direct report, between leaders and teams. This will require strengthening in communications, elevated expectations of management, and increased collaboration on goal setting and metrics.

Conclusion
A decade of studying metrics across non-profit institutions has shown consistently that, while metrics matter, they do not alone drive success. Performance in particular relies heavily on strategic talent management and development behind meaningful metrics and goals.

BWF research points to several challenges faced by development programs, but there are a few upsides as well. Perceptions of metrics and goals are mixed but there is opportunity and will to optimize time on and elevate tools for the frontline. Fundraisers are generally satisfied in their positions, and there is not a huge contingent of professionals looking to leave their institutions. Fundraisers continue to be motivated by the cause and culture of the organization, connecting with donors on that interest and passion. Moreover, the areas of weakness that increase turnover (leadership and management) are the very areas that professionals on the frontline want to develop.

Development shops cannot be passive in talent. Metrics should be a tool for structuring performance and growth, not a lowest common denominator to meet for each year. Time for fundraising should be protected, but institutions also must use new tools and strategies to capitalize on that time. Professional development is needed and wanted for performers along the frontline, but it must be matched in growth in management and leadership competence to retain those performers. BWF’s TalentED practice partners with non-profits to build success in each of these critical areas.

Top Drivers of Satisfaction/Dissatisfaction

<table>
<thead>
<tr>
<th>Very Satisfied</th>
<th>31%</th>
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<tbody>
<tr>
<td>Somewhat Satisfied</td>
<td>49%</td>
</tr>
<tr>
<td>Somewhat Unsatisfied</td>
<td>16%</td>
</tr>
<tr>
<td>Very Unsatisfied</td>
<td>5%</td>
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</tbody>
</table>

- Mission and values of the institution (76%)
- Location and community (65%)
- High job flexibility and benefits (62%)
- Office culture (49%)
- Poor development leadership (71%)
- Unrealistic expectations (60%)
- Office culture (55%)
- Poor direct team management (53%)

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Bentz Whaley Flessner reveals in-depth findings from its most recent fundraising metrics survey, including elements of engagement, competition, and performance.

We sought to step away from defining the “art and science” of fundraising for an individual to think more strategically about how institutions relate to those individuals and set them up for success utilizing metrics; but we also sought to understand other factors that influence and inspire fundraiser performance.

INSIDE: Optimizing Fundraiser Performance

Bentz Whaley Flessner’s TalentED practice partners with clients to drive strategic thinking, build new skills, and find and retain your fundraising superstars. We offer customized intensive trainings, workshops, one-on-one coaching, and talent management counsel. Contact us at training@bwf.com for more information.

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