

Optimizing Your Major Gift Team to Meet Your Fundraising Vision

BY JOY POHLAND JANSSEN



Introduction

You've mapped out your vision for the organization. You know where you want to go. Now you need to figure out the best way to get there.

Let's start with your development team.

Before beginning work on a job description for the new hires you'll need to achieve your vision, let's take a closer look at your team.

- Are you hiring because your current staff is not effective?
- Could you raise more money if you retained experienced gift officers? If salary is the issue, can you address it?
- Are gift officers the only staff you can hire to increase revenue?
- What are you doing to be competitive within the talent market?

There are a lot of factors that can prompt a closer look at staffing. Maybe you're new to the organization, you're ready to try something new, or a campaign is looming. No matter what is behind your motivation, careful staffing decisions are key.

Increasing your staff size may not always result in more dollars in the door. ”

In the coming pages, I will walk through the steps to assess your current program and identify the opportunity that may already exist. Then, let's explore the justification you may need to advocate for additional resources or new resources altogether!

In the end, you'll know whether to hire or not to hire.

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Evaluating Your Current Team

Any strategic planning process should begin with a thoughtful assessment of your program's current state.

If you already have gift officers:

- How is gift officer success being measured?
- How many visits or meaningful contacts are your current officers making?
- How many solicitations are they making?
- How many of those solicitations are resulting in granted dollars?

If you are considering hiring gift officers for the first time:

- What are your program goals?
- How have your goals changed or grown?
- What is prompting the need for gift officers?
- Do you have enough potential major gift prospects to warrant a full-time position?

These are all questions that are important to ask, and answer, when determining how many officers you need to reach your fundraising goals. [See how technology can help.](#)

You do not want to hire a new officer just to make up for the work your current staff is not doing.

Most fundraising leaders and managers agree that full-time fundraisers should be making at least 120 visits per year, or about 10-12 visits per month. Some officers strive for even more, stating targets of 15-20 visits per month, equating to roughly 1 visit per working day of each month. But the numbers show that officers often fail to hit even the more conservative targets. An analysis of Blackbaud customers showed that in 2019, the average number of visits by a gift officer was just 83. This shakes out to be only about 7 visits per month. And it isn't that there aren't prospects to visit – according to that same 2019 Blackbaud research, 56% of all assigned prospects did not receive a visit.

Regardless of the number of assigned prospects (more on that later), the percentage of prospects assigned without a visit—or in some cases even without a contact—is concerning, and certainly needs to be addressed before hiring new officers. You do not want to hire a new officer just to make up for the work your current staff is not doing. Expansion of your major gift team should be aimed at pursuing unrealized potential to increase dollars and donors to your program – not to make up for the shortcomings of the current team.

A careful evaluation of the current program performance is going to be the first place to start as you decide what your program is capable of and if your current staff has capacity to do more. If they are exceeding all goals and expectations and there are still dollars to reach, it may be time to post a position. If there is room for improvement – either a little or a lot – it may be best to start by working with your current staff and reevaluating your need for new staff in 6 – 12 months, or after goals are being met by your current staff.



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Retaining Talent as an Expansion Strategy

Speaking of current staff, part of expanding your major gift team is maintaining consistency in your current team. If your current team is a revolving door of departures, your hiring efforts will be spent on replacement rather than expansion.

Blackbaud research shows that the average gift officer tenure is just shy of three years. And the stakes are high – losing a current gift officer impacts the relationships the departing officer has built with current prospects, and you need to consider the length of time it will take for a new gift officer to be ramped up and ready to make solicitations.

One of the keys to growing your shop will be ensuring that you can boost the performance of your current officers and maintain staff for as long as possible. Consider the onboarding process, ongoing training and professional development, work habits, and the culture of the organization as critical components of the retention strategy. When thinking about your current staff, having a retention strategy for high performing fundraisers in place will be just as important as having a case for new fundraisers.

Consider why employees leave:

- Are they experiencing success?
- Are they not feeling recognized for their performance?
- Is their compensation wrong for their position or the work that they do?
- Do they have opportunities to grow with career paths identified?

Understanding why your previous high performers have left may help you build a strategy for retaining talent for the future. What areas do you as the hiring manager have the most control over? If they are struggling, can you put them on the path to success? If you cannot increase compensation and that is the top reason for officer departures, what other value can you provide?

CALCULATE THE COST OF REPLACING AN EXPERIENCED GIFT OFFICER

Measure the length of time between the hire date and the date of first solicitation delivered (use proposal ask date) for a previous hire.

Calculate the gift amount your departing officer was bringing in using the length of time you identified above for any point in the year. Remember that for a more senior officer or during a campaign this could be even larger.

Let's say you determined it takes six months to fill a position and your departing gift officer closed an average of five \$25,000 gifts in a six-month period.

Can your organization afford to be down over \$250,000 before a new officer is up to speed?

Can you offer a more flexible work schedule or better technology? Is there room in the budget for officers to attend conferences or earn certificates relevant to their work?

Finally, consider the bottom line on the compensation loss of a high-performing gift officer. Will you have to increase the salary of the position to replace this person anyway? Has the market and salary demand changed since the last time you posted a position? If the salary range is higher than it used to be, can you advocate for that new salary for your existing staff?

Ultimately, you are making a decision on whether it is best for the organization to retain current staff or hire new.

Building the Case to Add Staff

When considering growing your major giving team or building one from the ground up, it is important to identify what is being left on the table—either because your current staff needs help getting to all the potential (hire!), or they need help figuring out what to do with the potential (intervene!), or because there isn't anyone doing it at all (hire!).

Blackbaud research shows that on average, 66% of high-value prospects are currently unassigned, or not in a portfolio. This would of course be much higher if you don't yet have any portfolios at all! Based on that percentage, we know that there are hundreds—or thousands—of people who could fill portfolios. And a significant amount of effort will be needed to turn those newly assigned prospects into major gift donors.

When determining the number of prospects that are high value (using predictive modeling, for example), you cannot simply take the number of high-value prospects and divide it by the ideal portfolio size (typically less than 120 households) to determine the ideal number of new gift officers. There are a few things to consider first:

- Do we have more prospects than we know what to do with or prospects that have never had a direct staff contact?
- Do my current officers have quality prospects? Or do we need to clean out existing portfolios to make way for new, high value prospects? Is there room for churn?
- What is the average amount of time it takes my organization to turn a prospect into a major gift donor? According to Blackbaud research, for most organizations it will take 4 years.
- You cannot assign all of your high value prospects at once – doing so could dry up your pipeline for the future and assigning all of those people doesn't guarantee that they will get contacted since we know a larger percentage of assigned people aren't getting contacted. You would be better served to assign small handfuls at a time and properly churning portfolios,



Learn the secrets to the perfect gift officer portfolio.

[Get the secrets](#)

rather than dumping every potential prospect into a portfolio for them to only be contacted at the wrong time or missed altogether.

- Consider the new opportunity that gets identified every single year – newly-identified prospects, existing prospects that have a change in financial capacity, and repeat major donors all need to be considered for the future. Where will they fit into portfolios?

Thinking of the portfolio as the people (or in some cases corporations and foundations) that will be solicited in the current fiscal year, consider a realistic number for assignments based on your officer's current activity (contacts, visits, solicitations). The information you've compiled should offer an answer—and excellent data you can use to create a case either for making changes with your current staff or hiring new staff.

Proposals, or documented opportunities, can help you forecast for the future and make a case for additional staff. Using submitted proposals, you can project dollars coming in this quarter, next quarter, and by the end of the fiscal year. Will you reach your fundraising goals with what is in the current pipeline? Do you have more activity than your existing officers can handle? Proposals can help answer these questions.

However, this information is contingent on having consistent practices of entering proposal data (ideally at the time of the plan) and following a prescribed process unique to your organization. Make sure your process includes making updates when the proposal is asked, when the gift is expected to come in, and when it is granted. With the right software, it is easy for officers to follow your process, even from the field.

Without proposal compliance and adherence to best practices across the organization, evaluating the performance of current and future officers becomes difficult. Getting your process and practices defined before you make a hiring decision might seem tedious or like wasted time but doing so will enable you to build a case for hiring more officers, and also help with the ongoing evaluation of current staff.

Looking Beyond Gift Officers

A recent survey of Blackbaud customers ranked “shaping a sustainable pipeline of donors” as the top fundraising priority. To do that, you should consider the entirety of a donor’s lifecycle when making hiring decisions.

Before you immediately hire (or rehire) any position, make sure you are filling the right places on your team. Who will do the hand off from the bottom to the middle, to the top, and beyond? When thinking about who to hire, is there a need in the middle to shepherd people from mass marketing to major giving? Does an investment in a leadership annual gift officer need to be made? If you have that part covered, is your team equipped to make the mega-asks or do you need to consider hiring someone with principal gift experience? Finally, what does stewardship look like at your organization? Can you properly steward your donors in a way that puts them back into the solicitation cycle?

Making sure you are properly staffed at all levels—not just at the major gift level—is an important consideration. If you put too many officers at the top, you might not have enough resources at the bottom and middle to identify and cultivate prospects. Invest in too many resources at the bottom, and opportunity may be squandered and prospects who are ready to give might not get an ask in a reasonable amount of time.



Conclusion: To Hire or Not to Hire

So, do you need a bigger team to achieve your fundraising vision?

If you have a high-performing staff without an immediate departure threat, identified opportunity to pursue, and goals to reach, then hopefully your answer is a resounding “yes!”

If you have prospects ready to make a gift and you need officers who are going to help those prospects become major gift donors, then your answer is also, “yes!”

If those factors are not as clear-cut or the answers to those questions are “no,” hopefully you have some ideas for investing in your current staff and/or processes before posting that job description.

Of course, if throughout your evaluation process you discover you don’t need to hire just yet, or your request for hiring gets denied, remember that spending time on process and retention of quality officers isn’t worst case scenario. By doing the things necessary to keep quality talent and best practice processes – documentation of proposals, keeping portfolios clean and efficient, and defining handoff for prospects at different stages of giving – you can be even more prepared to make a hiring decision in the future.

See how you can partner with Blackbaud to get the data and insight you need to make strategic staffing decisions.

[Learn more](#)

About the Author

Joy Pohland Janssen joined Blackbaud by way of the Reeher acquisition in 2018 after spending over 2 years with the Reeher team. Joy brings nearly a decade of frontline fundraising experience and 5 years of consulting experience to the team. From phonathon to leadership annual giving and direct fundraising, Joy has a broad understanding of the fundraising machine and how data can be used to drive toward best practice and optimal results. As a strategic consultant, Joy especially enjoys working on proposal research and using plans as part of the fundraising process to drive more predictable and measurable results, providing accountability and motivation for fundraisers. Joy holds a bachelor’s degree from the College of Saint Benedict.

