



3 Steps to Greater Fundraising Productivity and Professional Growth in 2019 and Beyond

By Karl Miller, Managing Associate and Bond T. Lammey, Managing Associate

As with any professional position, it is important to regularly assess your personal development plan. As gift officers, your success is dependent on regularly taking stock of progress against your goals, reviewing donor portfolio strategies and management, and determining professional development goals for the next year. For those on a typical July 1–June 30 fiscal year, December 31 marks the halfway point of the year, but are you 50 percent of your way to achieving your activity and productivity goals?

No matter your fiscal year schedule, now is a logical time to review your accomplishments and create a plan to complete your outstanding goals. The following suggestions will help you make the next year a productive and prosperous one.

Progress to Goal

Look at the past 6 months of activity and review your progress each month on both activity metrics and productivity metrics.

For activity metrics, we typically review the following:

- Visits are defined as planned and face-to-face with someone in your portfolio. Questions to ask yourself include:
 - *How consistent was I month to month?*
 - *What created any spikes in activity?*
 - *Were my visits strategic and following a plan?*
 - *Are there any prospects in my portfolio I have not contacted to arrange a visit?* Discovery visits among new prospects may yield some good options.
 - *Can I be more proactive or strategic in the way I manage my calendar and schedule visits?*

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- Moves are defined as activities that help move a prospective donor closer to solicitation. Questions to ask yourself include:
 - *Am I able to qualify prospects in one visit? If not, what can I do to make my assessment visits more effective and efficient? Perhaps I'm not asking the right questions? Can my prospect development liaison/team help suggest some questions for me to ask?*
 - *How long am I keeping people in cultivation?*
 - *What existing funding opportunities are my prospects in cultivation interested in? For how many of my prospects in cultivation do I know this information?*
 - *Is there a way to shorten the cultivation cycle for my top 20 prospective donors during the next 6 months?*
- Proposals delivered/solicitations made are defined as personalized solicitations of a gift requiring a yes/no/maybe response from the prospective donor. Questions to ask yourself include:
 - *Did we ask for the gift or did the prospect offer the gift?*
 - *How long am I keeping prospective donors in the solicitation stage?*
In most cases, it should take no more than 12 months (6–7 visits) to get to the ask.
 - *Did we get the gift we wanted?*
 - *How accurate are my prospect solicitation strategy timelines?*
 - *Am I making solicitations at the right time?*
 - *Am I including the right people?* Sometimes including more individuals at your organization will result in a delayed timeline, but a larger overall gift.

For productivity metrics, we recommend tracking the following aspects of your work:

- Assessments made.
 - *How many new prospective donors did I qualify this year? We recommend major gift officers make at least 5 assessments per month. For newer fundraisers or those with a less mature portfolio, this number might be as high as 10–15 assessments per month.*
- Awards realized to solicitations made.
 - *What percentage of my solicitations were accepted? Depending on the maturity of the portfolio and the experience of the gift officer, this should be a range of 45–70 percent.*
- Award amount to solicitation amount.
 - *What percentage of my accepted/awarded solicitations resulted in a gift at (or above) the amount we requested? Depending on the maturity of the portfolio and the experience of the gift officer, this should be a range of 60–80 percent.*

■ Solicitations to gift capacity:

- *What percentage of my solicitations resulted in a gift at (or above) the gift capacity we believed the donor could do?*

The idea here is that we are inspiring the donor to make their largest gifts to our institution. We want to place our institutions as one of their top philanthropic choices. Part of our job is to create a relationship with our institution that inspires them to invest as close to 100 percent of their gift capacity with us. We do that through personalized, inspiring, and strategic cultivation and stewardship over time.

Work with your prospect development liaison/team to make sure capacity ratings are accurate and up-to-date while your prospects are in the cultivation stage to ensure your metrics are setting you up for success. Many prospect development teams orient their metrics towards this goal as well, so working together results in a win for everyone.

Portfolio Strategies and Management

Your Portfolio is a Diverse Garden Needing Constant, Personalized Care

A prospective donor portfolio needs constant management. If you think of a typical 125-person portfolio as a garden, you have 125 different flowers to cultivate and grow. They each require different amounts of feeding, watering, weeding, and care. If you don't have a written plan for the daily activities you need to make to keep up with your diverse garden, many of your flowers will die and others will never flourish and grow to their most beautiful and bountiful capacity. In the same way, you must have a personalized plan for every individual name in your portfolio listing the actions you will take every day to ensure they become an active, lifelong philanthropic supporter of your institution.

Individual Strategies

The first few weeks back in the office after the holiday break is the time to go through every name in your portfolio and either create a plan or review and enhance the plan you already have. Ideally, that plan should lead to a solicitation within the next 12–24 months for at least 50 percent of your list. The other 50 percent may either be in assessment or stewardship phases, and a solicitation could be planned for up to 36 months out. Regardless of timeline, every individual should be assigned a plan including daily, monthly, and quarterly activities designed to guide individuals in making the largest possible contribution to your institution. The following graphic may be helpful in determining how best to think about organizing your work, prospect-by-prospect.



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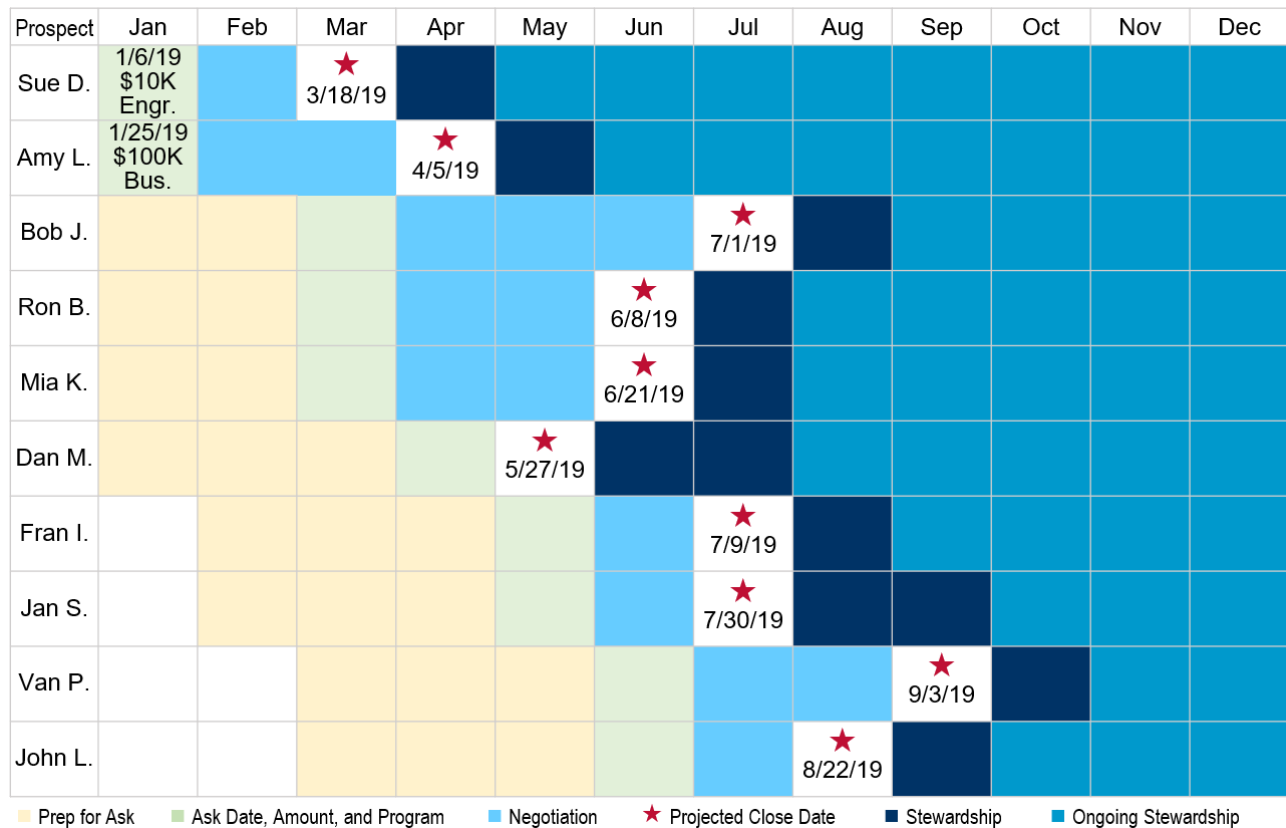


Figure 1. Portfolio Tracking Example

Portfolio Management

You’ve heard the saying, “Plan the work and work the plan.” Once you have a plan in place for each name in your portfolio, you begin to implement the plan. And once you implement the plan, you must make time to review the plan. We recommend doing that in daily, weekly, monthly, quarterly, and annual timeframes.

- **Daily.** Take time each morning to review your activities for the day. For most days of the week, that should be preparing for the day’s visits. One of my supervisors gave us a sign to place on our desk that said, “If I can read this, I’m not out meeting with prospective donors.” It was his not-so-subtle way to remind us that our job was out making visits. On the few days you are in the office, however, you should review and update the plan with the activities taken that day/week.

- **Weekly.** Take time each Friday to review your top 20–30 prospective donors. These are the 20–30 people you plan to solicit within this fiscal year. Have you taken the steps necessary to inspire them to make a significant gift? Have you involved the right people from across the organization? Are you ensuring you can make the ask by the right person(s), at the right time, for the right amount, and for the right project? Ask yourself if there’s any information on each prospect that, if you knew it, would help you advance your relationship with him/her. If the answer is yes, contact your prospect development liaison/team to see if they can help you locate more details. Asking a specific question (Did Jim Smith change jobs? How much has Beth Tucker given to other organizations or is she on any boards?) can help, or you can ask a broader question (Can you confirm Melanie Jones’ capacity? What’s the earnings trajectory for first-year analysts at Amazon?) and see how they might be able to help.

- **Monthly.** Go through all the names in your portfolio and review their plans. Is it still accurate? What needs updating? Are there places you can be more efficient? Are there others that need extending? Have you communicated the plan and any proposed changes with everyone internally and with your external volunteers who should be involved in each plan?
- **Quarterly.** Review your activity for the past three months. Ensure the plan is updated accordingly with clear next steps. How are you progressing on assessment visits? Do you need new names added to your portfolio? If your monthly or quarterly updates result in removing names or needing additional names in your portfolio, contact your prospect development liaison/team with your specific updates. You may even want to involve them in your monthly portfolio review.
- **Annually.** Conduct a deep dive into your portfolio, as described in this article—critically evaluate and supplement your activity, productivity, and professional development plans.

Professional and Personal Development

Beyond raising the funds and taking care of your donors and prospective donors, in order to do your best work you must also take care of yourself. In the same way that you have a plan for every donor in your portfolio, you should make and regularly review an annual plan for yourself. We all know that if we don't schedule it, it doesn't happen. Take some time to put some professional and personal goals on the calendar.

- Find a few conferences to attend in the next year. Conferences are a great way to not only keep you informed and find new ideas, but also to expand your network and even reinvigorate you. CASE and AFP offer great options year-round, and you can search the web or ask your colleagues for other options. The best way to grow professionally is to submit an idea to present at a conference, not just to attend. Did you try a new discovery strategy that really worked (or really failed)? That's a great session idea! Did you partner with multiple individuals

(deans, senior leadership, other fundraisers) on a solicitation approach? That's also a great session idea! Did you work with your prospect development liaison/team to assess your portfolio and further refine solicitation timelines and strategies as a result? Another great session idea!

- Create new ways to learn and collaborate. Tools like Audible and Scribd enable you to use your commute and other travel time as learning opportunities. Start a book club with your teammates, colleagues, dean, and/or volunteers. Apra has started a virtual book club, and some local AFP chapters host book clubs in their communities—if you are part of these organizations, you can inquire directly with them to participate. Create an accountability and support group with your teammates to help you stay focused on your goals by using an accountability app such as StickK, Beeminder, Pact, Coach.me, or Pavlok.
- Plan your personal time. A 2018 *Forbes* article called the United States the “No-Vacation Nation,” referring to the staggering amount of vacation days we leave unused annually. Plan your next vacation and put it on the calendar now. Plan a monthly or quarterly outing with your colleagues and put them on the calendar now. If you have the days, plan a 3-day weekend once a quarter or more and put it on the calendar now. And when you're away on vacation, plan on staying away—communicate to your office that you will be out and take the time to unplug.

If you can accomplish these steps throughout the year, you will ensure a successful future in your role. With these routine steps, you will achieve more (and hopefully, be happier doing it!) These plans require nuance and strategy—if you have any questions about development officer training or coaching, strategic planning, or portfolio management feel free to contact Bond Lammey at blammey@bwf.com or Karl Miller at kmiller@bwf.com. ■