EAB

Making Meaning of Metrics

Leveraging Accountability and Analytics to Enhance Fundraiser Productivity

Advancement Forum

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Supporting Members in Best Practice Implementation

Resources Available Within Your Membership

This publication is only the beginning of our work to assist members in creating a comprehensive performance management plan for frontline fundraisers. Recognizing that ideas seldom speak for themselves, our ambition is to work actively with members of the Advancement Forum to decide which practices are most relevant for your organization, to accelerate consensus among key constituencies, and to save implementation time.

For additional information about any of the services below—or for an electronic version of this publication—please visit our website (eab.com/AdvancementForum), email your organization's dedicated advisor, or email research@eab.com with "Advancement Forum 'Making Meaning of Metrics' Request" in the subject line.

Advancement Dashboards

A companion research brief on creating actionable advancement dashboards for strategic and managerial reporting is available at eab.com. This publication features a host of sample dashboards for MGOs and managers and discusses considerations in choosing some variables for display over others.

Recorded and Private-Label Webconference Sessions

Our website includes recordings of webconferences walking through the practices highlighted in this publication. Forum experts are also available to conduct private webconferences with your team.

Unlimited Expert Troubleshooting

Members may contact the consultants who worked on any report to discuss the research, troubleshoot obstacles to implementation, or run deep on unique issues. Our staff conducts hundreds of telephone consultations every year.

Facilitated Onsite Presentations

Our experts regularly visit campuses to lead half-day to day-long sessions focused on highlighting key insights for senior leaders or helping internal project teams select the most relevant practices and determine next steps.

All Advancement Forum resources are available to members in unlimited quantity.

To order additional copies of this book, or to learn about our other services, please visit us at eab.com or contact us at 202-266-6400.

Executive Summary

After researching the pre-hire aspects of MGO talent management in 2014—namely, recruitment and interviewing of frontline fundraiser candidates—our research team was directed by our members in 2015 to investigate how to enhance MGO performance management through the strategic application of metrics.

While this publication will frequently reference "metrics," its breadth encompasses the entirety of major gift officer performance management.

Metrics, of course, are the first building block of performance management. After all, how can you improve performance if you don't even measure and track it? Thus, in part one of this book we will review sample metrics from high-performing advancement shops and outline how you can tailor your MGO goals to everything from MGO tenure to portfolio composition to academic unit affiliation. We will also discuss how to utilize a more holistic approach to MGO metrics, including recommendations to incorporate analytical rigor into goal setting, meaningfully embed metrics into the MGO recruitment process, adopt easily comprehensible scorecards, and leverage a "less is more" tactic to lower unrealistic goals and reduce portfolio sizes. Finally, since securing buy in from MGOs on metrics is critically important, ideas for achieving consensus from frontline fundraisers on metrics will be profiled.

While a robust set of formal expectations is important, given what we know about human behavior, metrics aren't very useful unless they have "teeth." To this end, part two of this publication will cover how to connect the dots between goals and consequences. Specifically, how can you motivate MGOs to care about their metrics, using both carrots and sticks? From quarterly performance reviews to incentive compensation to career ladders, institutions across North America have successfully tested innovative ways to instill accountability into their advancement shops.

Finally, once you have designed a rigorous metrics system with a clear relationship to consequences, part three of this publication details how to utilize data and analytics on MGO behavior in order to guide day-to-day decision making related to time allocation and prospect prioritization. In turn, the improved data quality in your constituent relationship management system will enable you to make a more compelling case for additional investments in advancement and arm you with information to encourage deans to allocate more MGO time to frontline fundraising activities.

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Why Focus on MGO Performance Management?

INTRODUCTION

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CAOs Need to Prove ROI

Chief advancement officers (CAOs) are under significant pressure to demonstrate a return on the substantial investments being made in fundraising, alumni affairs, advancement services, and marketing and communications. This pressure is coming from presidents and governing boards, and also increasingly from prospective donors.

What has compounded this pressure for *public* institutions has been the drop in state support of higher education. Many CAOs we interviewed expressed a sense of nostalgia for the "good old days" when philanthropic dollars were a "nice to have" and didn't come with the kind of strings to which they are now attached.

But this is a critical opportunity for advancement, as provosts, chief business officers, and presidents increasingly look to the CAO for support of causes essential to the character of the institution. One CAO we spoke with from a liberal arts college spoke of the "small margin of excellence" that advancement used to support, and that it has since transitioned to being one of the key revenue streams for most universities. In this new environment, a focus on MGO productivity is second to no other issue.

Bridging the Funding Gap

Pressure from Our Major Gift Donors...

> "Our entrepreneurial background influences our approach to philanthropy…to make our giving more effective, scalable and sustainable. The return on this investment is stronger, more resilient communities."
>
> *Paul Orfalea*
> *Founder, Kinko's*
> *(now FedEx Office)*

...and University Leadership as Well

> "The university could invest more in faculty and students. If it's going to put more money in advancement, we have to be able to show what we're doing with that investment, and this has become especially acute in the post-2008 recessionary period."
>
> *Matt Ter Molen*
> *Chief Advancement Officer*
> *Syracuse University*

Public Universities Increasingly Reliant on Advancement

Revenue by Source (2008–2013)[1]

Growth in voluntary support compensating for declines in public funding

Public Funding, in Billions

Voluntary Support in Billions

Legend: Public Funding — Voluntary Support
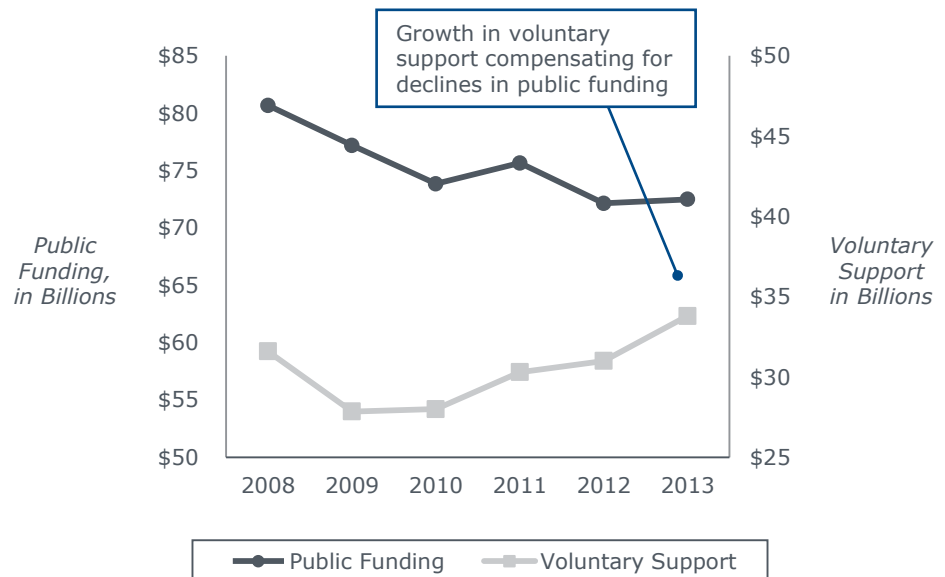
1) In real 2013 billions of dollars.

eab.com

Disproportionate Dollars on Development Officers

A quick glance across the advancement division—from fundraising to alumni affairs to advancement services—reveals that development is the area that generates the most expenses.

In particular, it is the human capital costs borne by advancement shops that are so substantial. The major gift officer, specifically, has witnessed a significant rise in compensation as the talent landscape for top performers evolves into a seller's market. Indeed, much of EAB's 2014 research on MGO recruitment indicated that institutions are engaged in an arms race as they compete for top MGOs.

Given that MGO salaries comprise such a significant portion of advancement budgets, it is incumbent upon CAOs to ask difficult questions about their returns on fundraiser compensation.

MGOs Account for Increasingly Large Share of Budget

Advancement Department Expenditures at Research Universities

Council for Aid to Education Data, FY2014

n=36

37%

63%

- ■ Fundraising/Development Salaries and Benefits
- ■ All Other Expenses
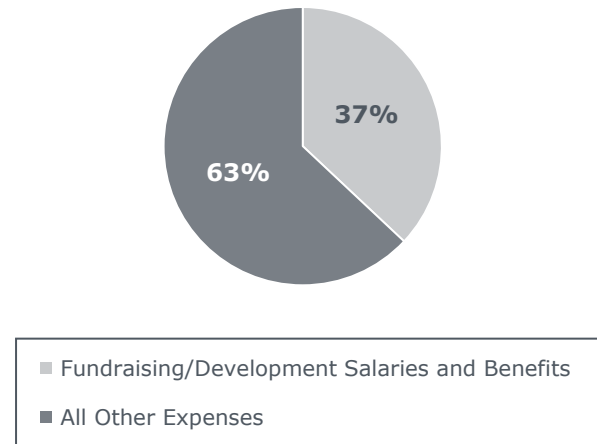
Average MGO Salaries

Association of Fundraising Professionals Data, 2009–2013

$100,000

$95,000

$90,000

$85,000

Salary

$80,000

$75,000

$70,000

$65,000

$85K

$97K

$72K

$82K

2009   2010   2011   2012   2013

- ━●━ MGO Average   ━■━ Top 25 Percentile

The Efficiency Imperative

The value of metrics becomes even clearer when considering the importance of efficiency.

Even the best-resourced universities are having a tough time finding budget dollars to increase the number of MGOs they have on staff, even in the face of ever-increasing campaign goals.

However, even if you have recently started seeing budget increases, the reality of the prospect landscape is that you will probably never have enough boots on the ground to cultivate relationships with every prospective major gift donor.

It doesn't take much more than a simple thought experiment to prove this assertion. Assuming your university counts 180,000 alumni among its ranks (a typical figure for public research institutions), only about 12%—or 20,000—of these individuals would be considered major gift prospects. Since the average MGO portfolio size is 110 prospects, your advancement shop would need *200 MGOs* to cultivate and solicit these major gift prospects.

Even if you manage a large advancement operation, it is highly unlikely that you could hire this number of MGOs due to fiscal and political challenges.

"Doing More with Less" Has Become Advancement's Mantra

No Relief in Sight
No Increase in Staffing Levels After Great Recession

Advancement Headcount Averages at Four-Year Institutions[1]

	FY12	FY13	FY14
Total	88	87	91
Communicators	10	10	11
Development	18	18	18
Advancement Services	36	37	39
Alumni Relations	24	22	23

Legend: Alumni Relations, Development, Advancement Services, Communicators
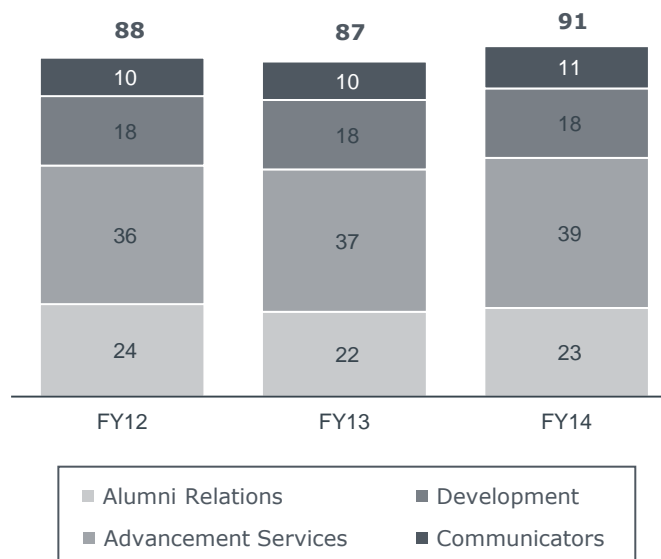
Wealth Screen Too Porous
Full Prospect Coverage Requires an Army

In a perfect world...

181K Average solicitable alumni[2]

12% Defined as major gift prospects through internal or external analysis

110 Average gift officer portfolio

198 Ideal number of FTE MGOs

Is That a Gift Pyramid Or the Space Needle?

Higher education fundraising gift pyramids have become incredibly narrow over the past 15 years. Compared to 2006, when the top 1% of donors accounted for 64% of campaign funds, in 2011 that figure stood at 77%. Our research interviews suggest that this figure has only increased since 2011.

The graphic at right represents an anonymized private research university. An extreme example of the 80/20 rule, 85% of its support came from just over 100 gifts.

Given this increased focus on major and principal gifts, improving MGO productivity by even a marginal amount could mean a difference of millions of dollars in fundraising revenue.

But while many CAOs have observed the increasing narrowness in gift pyramids, only a few have noticed a similar trend in terms of the "talent pyramid." Our interviews and findings from EAB's 2014 MGO survey of 1,200+ fundraisers suggest that there is a small group of fundraisers who are extraordinarily productive. This is why focusing on MGO productivity has such a strong ROI—even marginal increases in MGO productivity can reap substantial dividends.

The Pareto Principle on Steroids

Percentage of Total Campaign Dollars Provided by Top Donors

	2006	2011
Top 1%	64%	77%
Top 10%	87%	95%
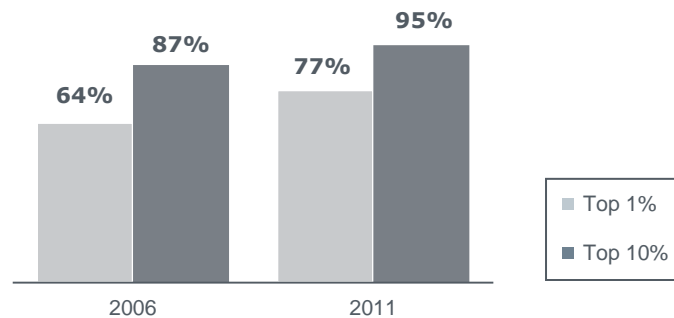
Number of Gifts and Percentage of Total Funds at Each Level: Hazel University[1]

- $1M–$10M+ — 22 Gifts (65%)
- $100K–$999K — 81 Gifts (20%)
- <$100K — 21,800 Gifts (15%)
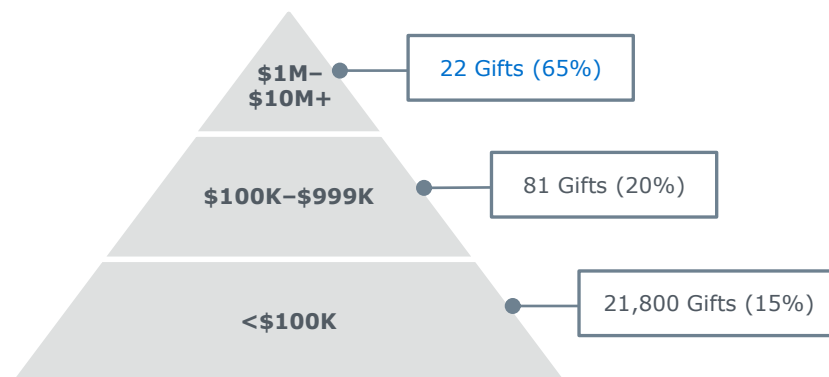
> "We talk often of the fundraising gift pyramid, but I think there's a similar talent pyramid—one in which the top 10% of our MGOs are responsible for disproportionately high fundraising totals. If we accept this premise, we have to remain focused on measuring and increasing the productivity of our major gift officers."
>
> *VP, Advancement*
> *Public Master's University*

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1) Anonymized private research university.

What Are Your MGOs Doing with Their Time?

At right are the results of a question on the 2014 EAB MGO survey. We asked MGOs to tell us what proportion of their time was spent on frontline fundraising. The average was close to 70%.

There are certainly instances in which it makes sense for a frontline fundraiser to be engaged in activities not directly related to prospects. MGOs must meet with their deans to build an understanding of the academic unit they serve or with faculty to better comprehend cutting-edge research being conducted at the university. But we can all agree that they shouldn't be picking out napkin colors for an event, as one CAO said his MGOs used to do.

Even though many top MGOs—Curious Chameleons[1] as they are—are skilled at writing newsletter articles or organizing events, their time and skill set are so valuable that the opportunity cost of not focusing their time on fundraising is far too high to ignore.

Survey Reveals Substantial Time Allocation to Non-fundraising Activities

Approximately what percentage of your time is spent on fundraising versus other responsibilities?[2]
n=1,217

36% of MGOs spend ≤60% of their time on fundraising

13%
30%
23%
34%

■ Less than 50% of time   ■ 70%–80%
■ 50%–60%   ■ 90%–100%
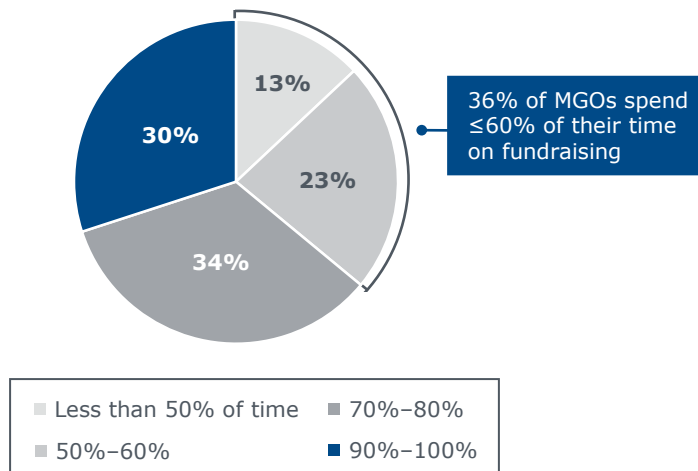
> "No hiring process is perfect, but I am surprised that we sometimes hire people as major gift officers who are often threatened by the idea of going out and visiting with people. The whole thing is illogical to me. But in our environment there are so many external opportunities that might capture a major gift officer's attention but are, in fact, tangential to actual major gift work. So it takes a real discipline on everyone's part—supervisors, deans, and MGOs—to stay focused on what is important."

Niles Sorensen
Vice Chancellor for Advancement
University of North Carolina at Charlotte

1) This term refers to the results of EAB's 2014 Gifted & Talented research study. For more information, please visit http://www.eab.com/af/curiouschameleon.
2) Other responsibilities defined as organizing events or writing articles for university publications, etc.

Source: EAB interviews and analysis.

From Data Deluge to Distillation

Another reason we decided to focus this publication on fundraiser performance management is that we're now living in the era of big data. Your advancement services staff have access to millions of data points, but the key question is how to distill and display this information in a way that guides decision making for frontline staff.

An increasing proportion of your MGO staff is comprised of millennials, who have a very different relationship with technology than do baby boomers and even generation Xers. And as author James Gleick explains, "When information is cheap, attention becomes expensive."

To this end, the final portion of this publication will review innovations in using data to inform day-to-day decision making for MGOs.

In Era of Big Data, MGOs Need Quick Access to Salient Information

Day-to-Day Digital Overload

23%
Increase in number of business emails sent/received by average users between 2011 and 2015[1]

1.72
Hours spent per person each day on social media in 2014

65.3
Mobile app notifications received per person each day in 2014

No Time to Drill Down

"To use that massive Cadillac database to figure out how many visits you have this year versus last year…at the end of the day a frontline fundraiser might want to know that, but it's not critical, so they'll never find that data themselves."

Missy Ryan,
Senior Director of University Development
Clemson University

1) Excluding spam emails.

Source: Church K, "An In-Situ Study of Mobile Phone Notifications," Telefonica Research, http://www.ic.unicamp.br/~oliveira/doc/MHCI2014_An-in-situ-study-of-mobile-phone-notifications.pdf; Mander J, "Daily Time Spent on Social Networks Rises to 1.72 hours," globalwebindex, January 26, 2015, http://www.globalwebindex.net/blog/daily-time-spent-on-social-networks-rises-to-1-72-hours; EAB interviews and analysis.

EAB

Laying the Foundation

Setting Expectations and Securing Buy in

1

Why Is Intermediate Goal Setting So Important?

No substantive discussion of MGO performance management can begin without first addressing the topic of metrics.

Some CAOs we interviewed shared that it's a bad idea to strictly set metrics based on an annual dollar amount because this allows MGOs to neglect pipeline cultivation activities and fails to take advantage of opportunities to course correct in the middle of the year. While we wholeheartedly agree with these points, there's a second reason why it's best not to simply set annual dollar goals.

Scientists have known for some time that the brain "feel-good" chemical, dopamine, causes pleasure when released. Additionally, we know that with each success on the road to achieving a goal, dopamine is also released. This has important implications for productivity, as the release of dopamine increases motivation. So instead of merely setting a few annual goals for MGOs, we advocate setting a whole host of intermediate goals such as on a weekly, monthly, or quarterly basis.

Another way to think about metrics is to ask what happens in their absence. As is detailed in the table to the right, a world without metrics is one rife with challenges, which collectively lead to lower productivity.

Defining Success in Clear Terms Is Critical for MGOs

MGO receives
short-term goal

Productivity
spikes

**The Goal-
Dopamine Cycle**

MGO
achieves goal

Dopamine release;
motivation level
increases
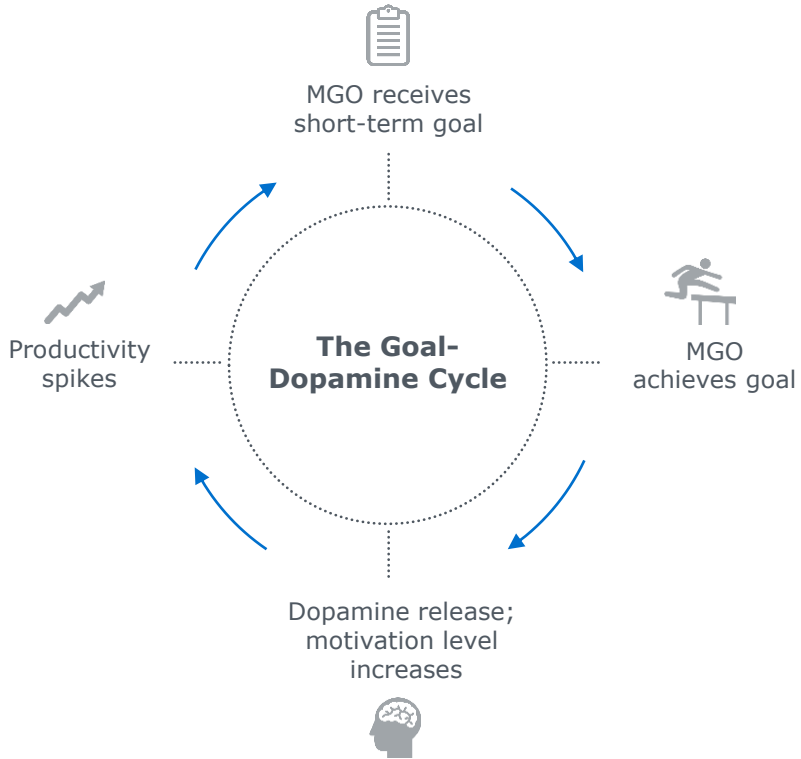
Problem Without Metrics	Example
No job definition	New MGOs uncertain of job expectations
No rank for prioritizing time	MGO unfocused, does not know best activity to perform
No guidance for reaching goal	Large financial target paralyzing without next steps
No timely success measure	Outcomes revealed long after efforts made
No basis for evaluation	Multiple MGOs' performance difficult to judge fairly

Weighing in on Individual and Team Goals

A clear conclusion of this study is that there is no such thing as "magic metrics," or an ideal set of performance goals that will enhance productivity. Indeed, metrics need to be selected with careful attention given to your advancement shop's culture, campaign stage, prospect base, and a host of other variables. For example, advancement shops in the early stages of a campaign might prefer to more heavily emphasize activity-based goals such as visits, rather than more outcome-focused goals like gifts and dollars raised.

Beyond the difference between activity- and outcome-based goals, another important distinction to make is between individual and team goals. You'll find at right some considerations you should take into account when deciding which might be more appropriate for your MGOs given the culture of your advancement shop.

Which is Right For Your Advancement Shop?

Individual Goals

Pros	Cons
• Roles more clearly defined • Sense of control over own performance • Useful as a guide to plan time • Awareness of appropriate performance level • Awareness of success • Sense of fair evaluation • Ability to refuse non-MGO work	• Reduced flexibility • Risk that goals will be hit in dysfunctional manner • Short-term view promoted at expense of long-term horizon • Target levels may be difficult to set correctly • Target levels may become ceiling instead of floor

▶ Considerations

- Goal implementation typically leads to debates about definition and credit
- Goals can promote negative behaviors
- Fewer goals better than more goals
- Goals should not be changed often

Team Goals

Pros	Cons
• Collaboration always prominent • Information sharing constant • Activity of supporting staff increased • Office culture highly positive • Donor interests always of paramount importance	• Jobs tend to become ill-defined • Staff has difficulty prioritizing activities • Little incentive for individuals to outperform • Individual accountability difficult to measure • Underperformers can hurt team's morale

▶ Considerations

- Consistent managerial oversight necessary
- Managerial span of control limited
- Employees must embrace spirit of collaboration
- More staff will have personal stake in outcome of MGO candidate interviews

Source: Philanthropy Leadership Council interviews and analysis, The Advisory Board Company; EAB interviews and analysis.

How to Choose Relevant Targets

A Three-Tiered Process for Finding the Answer for Your MGOs

Tailor Goals (Type and Level) Based On:

Step 1: Advancement Department Characteristics

- Campaign stage
- Fundraising maturity

Step 2: MGO Characteristics

- Tenure
- Title/role/compensation
- Percent time fundraising
- Academic unit affiliation

Step 3: Portfolio Characteristics

- Number of prospects
- Capacity ratings
- Affinity ratings
- Prospect stage distribution

While "magic metrics" do not exist, there are a number of ways CAOs can tailor metrics to the specific circumstances an institution faces. Goals need to take into account the characteristics of your advancement division – for example, goal levels might be different in the silent phase of a campaign than they are down the home stretch. You might have much more identification and qualification to do in the former and much more solicitation to do in the latter. An advancement shop on its fifth comprehensive campaign is also in a very different place than a university starting its first mini-campaign.

The characteristics of an MGO are also important. How long has this person been in seat? Does she have prior experience in fundraising? What is the academic unit affiliation? We all know that a million dollars raised by an education school fundraiser is not the same as a

million dollars raised by a business school fundraiser, after all, so why wouldn't we take this into account when setting goals?

Finally, an MGO's portfolio should factor into her goals insofar as each portfolio has a different aggregate capacity and affinity rating and, even more fundamental than that, a different number of prospects.

Metrics lose credibility with MGOs when they aren't adjusted on the basis of at least some of these characteristics. At the same time, a thorough, highly tailored system of metrics can take you a long way toward establishing a robust performance management program.

Source: EAB interviews and analysis.

Be Careful What You Measure

Knee-Jerk Metrics Cause Confusion and Lower MGO Productivity

1 VP sees MGOs in the office too much

2 Metric added: Face-to-face visits

3 MGOs visiting the same prospects

4 Metric added: Number of unique visits

8 Metric added: Number of gifts closed

7 MGOs are asking too soon and alienating prospects

6 Metric added: Number of solicitations

5 Visits are friendly but not substantial

9 MGOs are asking too low

10 Metric added: Specific dollar goal

∞

One area where we've seen a few CAOs stumble is in what we call reflexive metrics. Instead of taking a well-planned, holistic, and comprehensive approach to performance management, they implement metrics in a haphazard, knee-jerk fashion in response to specific conditions they see in their shop.

For example, you might notice that MGOs are spending far too much time in the office. So you set a visit goal.

So MGOs start visiting prospects more frequently, but they're simply choosing the same prospects to visit over and over. So then you implement a "number of unique visits" metric. MGOs respond by expanding their pool coverage, but their visits are those a "friendraiser" might make and thus not very substantial.

So then you add an "ask" goal. But this leads to MGOs shortening their cultivation cycles and soliciting

prospects too quickly, resulting in a low yield rate on solicitations. In order to ensure you're receiving the number of gifts you need, you add "gifts closed" as a metric. But then MGOs start lowering their ask amounts because they're just focused on closing gifts. What incentive exists, they probably reason, to ask prospects for a $100,000 gift instead of a $25,000 gift? So you add a specific "dollars raised" goal.

You can imagine where this might lead. It's metrics ad nauseam, and it's not an optimal way to approach metrics.

To be sure, being flexible with metrics is not a bad thing. Indeed, a strong performance management strategy necessitates flexibility. But a critical component of this approach is starting from a strategic place with metrics to reduce the anxiety and confusion associated with change, while also aligning incentives with desired behaviors.

Source: EAB interviews and analysis.

Make Your Performance Data Work for You

How to Analyze Your Data to Uncover Ratios

Pool Coverage	Effective Use of Visits	Yield Rate	Accurate Ask Estimates
❄️	🤝	🎁	$
⬇️	⬇️	⬇️	⬇️

$$\frac{\text{\# Unique Visits}}{\text{\# Total Prospects}} \qquad \frac{\text{\# Total Visits}}{\text{\# Asks}} \qquad \frac{\text{\# Asks}}{\text{\# Major Gifts}} \qquad \frac{\text{Ask Amount}}{\text{Gift Amount}}$$
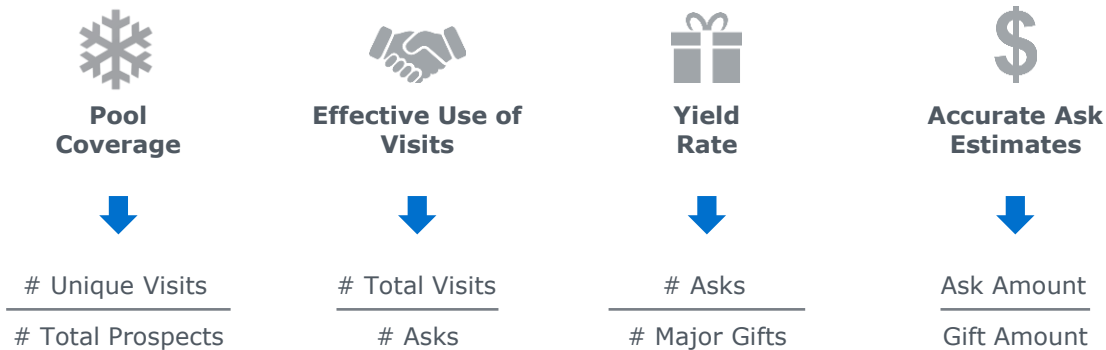
> ❞
>
> "We had a campaign consultant who told us to use a set of ratios for MGO goals. When I asked where he got these numbers from, he simply told me they were well-known in the industry. Maybe I'm just a data guy, but I'm not going to overhaul my performance management system based on figures that are not specific to my institution—or at least based on best practices. "
>
> *AVP, Development*
> *Public Master's University*

Instead of engaging in a "game" of reflexive metrics, you can design a system of metrics with more rigor. You can certainly use industry benchmarks to guide goal setting, and we'd recommend doing this if you're a small shop and/or don't have confidence in the quality of data in your database. But for those who prefer a more analytically rigorous approach, you'll need to use data gleaned from fundraiser historical activity to inform goal setting.

For example, looking at the number of unique visits tells you about pool coverage for an MGO. How much of an MGO's portfolio is lying fallow?

By calculating the number of visits divided by the number of proposals submitted, you can answer whether your MGOs are using their visits to appropriately move a prospect toward solicitation. By dividing proposals submitted by gifts closed, you can determine whether proposals are high in quality and tailored to the needs of a donor.

Finally, by dividing proposal dollar value by dollar value of gifts closed, you can learn quite a bit. A high percentage means that you are likely leaving money on the table and asking for too little, or that are prematurely soliciting a major gift prospect. A low percentage means you are not doing enough cultivation or discovery during your solicitation process to place winning proposals in front of prospects.

This kind of analysis can help you set appropriate goal levels for all types of metrics, including targets for unique visits, face-to-face visits, and solicitations.

Source: EAB interviews and analysis.

A More Rigorous Approach to Dollar Goal Setting

If analytical rigor is something you plan to incorporate into your MGO goal setting process, we recommend adopting a process utilized by Northern Arizona University. Nearly all CAOs ask their MGOs to complete annual plans for prospects. But we found that there is much room for improvement in the methodological rigor with which solicitation and gift closure rates, along with dollar goals, are estimated.

NAU has successfully piloted such an approach. Their decision to implement a dollar goal led them to seek a more informed way to determine specific targets for each MGO. Previously, they had based dollar goals on historical performance (while understanding that bequests and unexpected gifts could skew numbers of prior years).

Now, to establish dollar goals MGOs fill out a probability worksheet. The worksheet outlines a calculation that lists every prospect, how much the MGO will ask, the probability of the solicitation occurring within that fiscal year (on a scale of 0%-100%), and the probability of that solicitation closing within that fiscal year (also on a scale of 0%-100%).

In addition to providing more accurate forecasting and goal setting, the exercise of computing these data points can reveal much about an MGO and her approach to her portfolio.

NAU Incorporates Proposal Close Probability into Annual Planning

1 Probability of solicitation this fiscal year

X

> Low = 0%
> Medium = 50%
> High = 75%
> Certain[1] = 100%

2 Probability of gift closing this fiscal year

X

> Low = 25%
> Medium = 50%
> High = 75%
>
> If the gift comes in without a pledge, with little or no effort = 100%

3 Planned ask amount

=

4 Dollar goal for fiscal year

Sample Probability Calculation for NAU Director of Development

Prospect	Ask Amount	Solicitation Probability	Close Probability	Expected Amount
Prospect A	$1M	50%	50%	$250K
Prospect B	$80K	100%	75%	$60K
Prospect C	$80K	100%	75%	$60K
Prospect D	$200K	50%	25%	$25K
Prospect E	$150K	100%	50%	$75K
			Total Dollar Goal:	**$470K**

1) Solicitations made last year, but not closed, are also included in this category.

Source: EAB interviews and analysis.

Embedding Metrics into Job Descriptions

Now that we've discussed how to select appropriate metrics, let's move on to how CAOs can set appropriate expectations for MGOs from the get go.

A true commitment to metrics throughout the MGO life cycle requires starting before someone even joins the office.

We conducted an analysis of job listings for higher education MGO roles on the Association of Fundraising Professionals website. We were surprised to see that over 60% of job postings *did not* include the articulation of specific metrics. This is a very simple change you can make that will enhance candidate understanding of the role of metrics in your culture.

Many CAOs shared that simply including specific target levels for metrics eliminated candidates who didn't want to be judged on a formal system of metrics, which saved the office interviewing time. Additionally, it helped to send a message to metrics-focused fundraisers that the office culture was one that supported rigorous performance management.

Clear Expectations Start From Day Zero

Development Officer

Salary: $75,000

Minimum Qualifications: Five to seven years of frontline fundraising experience

Performance Expectations:

- 25 face-to-face visits per month
- 2 major gift proposals submitted per month
- $500,000 raised per year…

Specific target levels, rather than ranges, clearly articulated

All performance metrics included

Gauging Reactions to Performance Metrics

DePaul University has taken things one step further and incorporated performance metrics into its MGO interviews. In one-on-one interviews with candidates, the hiring manager shows them a copy of the performance metrics grid and then verbally walks them through it. She highlights the role they are interviewing for and where that position fits into the broader team. Afterwards, candidates are invited to ask questions and respond to the metrics.

DePaul indicated that candidates either respond with enthusiasm and compliment the system or visibly blanch in reaction to it.

DePaul's approach builds an explicit discussion of expectations and success directly into the interviewing process. It lets MGOs know up front what they will be expected to do and how they will be evaluated.

This tactic helps communicate institutional expectations and culture and thus eliminates the surprise factor around performance accountability later on. Through this process, candidates get information they need to make an informed decision if they receive an offer.

DePaul Reviews Metrics During MGO Interviews

1 Applicants travel to campus for interviews with advancement team

2 Candidates receive a walkthrough of divisional performance metrics as part of interview

3 Metrics include solicitation, contact, and dollar goals along with portfolio distribution

6 Interviewers also test candidates' ability to execute on metrics via a portfolio exercise

5 Interviewers assess candidates' reaction to the metrics as part of overall evaluation

4 Candidates invited to ask questions and respond to performance metrics

Source: EAB interviews and analysis.

Scoreboards Aren't Just for Stadiums

In addition to setting appropriate expectations during the recruitment and interviewing process, you should develop a comprehensive metrics system that is rigorously designed yet easily comprehensible. You may think that this is turning an art into something resembling an algorithm, but our interviews uncovered that MGOs found it helpful to operate within the confines of boundaries.

In particular, the use of scorecards, or point systems, is a great way to organize metrics into a comprehensible fashion. These systems distill a massive amount of information into a simple page and create a seamless connection to the university's formal performance review.

Additionally, scorecards allow you to weight different variables at various levels depending on your priorities in a given year or for a given role.

Progressive Advancement Shops Create Rigorously Designed Scorecards

Benefits of Using a Points System

More objective indicator of success than qualitative feedback

Easy to integrate into formal performance review

Distills massive amount of information into most relevant data points about performance

Agile enough to allow for weighting of activities or outcomes most valuable to your shop in a given period

Source: EAB interviews and analysis.

Adding It All Up

Freed-Hardeman University's Points-Based Metrics System

Average of the portfolio's production over last 5 years, throwing out highest and lowest years, +15%

Included in Total Contacts

Category	Goal	Percent Attainment	Points Possible	Points Earned
Cash	$1M	80%	50	40
Total Contacts	25 per week	100%	30	30
In-Person Contacts	5 per week	90%	10	9
Donor Retention	NA	80%	10	10
Bonus for Estate Gifts	NA	NA	5	3
			Total Points:	**92**

Based on a scale:
- ≥80% = 10
- 70%-79% = 5
- <70% = 0

Based on a scale:
- ≤$49,999 = 1
- $50,000-$149,999 = 2
- $150,000-$249,999 = 3
- $250,000-$499,999 = 4
- ≥$500,000 = 5

Freed-Hardeman University in Tennessee has been using a points system—adapted from use at a local TV station—for nearly eight years.

Fifty percent of a fundraiser's evaluation is a cash goal, which is determined by taking an average of her portfolio's production over the trailing five years (eliminating the single highest and lowest years) and adding 15% to this figure. This figure includes only gifts solicited by the MGO herself.

Forty percent of the evaluation is contacts, which includes in-person and other contacts.

The remaining points are allocated to goals related to donor retention—as a smaller school, Freed-Hardeman's MGOs also do annual fund work—and a bonus for estate gifts.

A critical aspect of this points system—which results in a score out of 100 possible points—is that it is directly tied to a specific outcome. A fundraiser's score enables him or her to earn a bonus of up to 10% of base compensation.

Points With a Twist

Montana State University Alumni Foundation tracks MGO performance on the basis of four metrics: personal visits, discovery visits, solicitations, and dollars raised.

While this set of metrics is common, the MSU Alumni Foundation has pioneered an innovative approach to metrics, which differs from Freed-Hardeman in that it allows for "overperformance" in certain categories.

The point system assigns a point value to each of the four metrics tracked according to the shop's priorities. The percentage of the goal achieved in each category is then multiplied by the possible points in that category. What distinguishes the foundation from others is its use of a "points cap."

MSU Alumni Foundation Institutes Innovative Points Cap

Montana State's Metrics

Personal visits

Discovery visits

Solicitations

Dollars raised ("solicitation gifts booked")

> "In our system, you earn points in each task category. These points are capped because I don't want over-performance in one category to mask lower performance in the other categories. For example, it's great to secure a $3M gift, but you still need to perform on the other metrics."
>
> *Chris Murray*
> *President and CEO*
> *Montana State University*
> *Alumni Foundation*

Points Cap

The maximum number of points an MGO can earn in one metric, including performance greater than 100% of goal.

✓ Allows room for recognition of over-performance relative to goal

✓ Serves to ensure that an MGO who greatly over-performs in one area remains motivated to perform in others

Source: EAB interviews and analysis.

The Points Cap: Recognition Within Reason

You can see the points cap in action at right. Let's use the dollar goal as an example. This goal is $1 million per MGO and is worth 30 points, with a points cap of 45.

If three MGOs perform at varying levels relative to this dollar goal, we can see how many points they'd earn.

MGO A was just short of $1M, raising $870,000. Since this represents 87% of his dollar goal of $1 million, he receives 26 out of 30 points.

MGO B raised $1.5 million, and since 150% of 30 is 45, he receives 45 total points for this metric.

MGO C, even though she raised $500,000 more than MGO B, only receives 45 points because of the points cap. The former exceeds goal by $500,000 and the latter by $1 million, but they both receive 45 points in the dollar category due to the points cap.

The points cap is a great way to recognize the hard work of fundraisers in one goal area without allowing it to hide poor performance in another or excessively reward fundraisers for gifts that come in over the transom.

MSU Alumni Foundation Prevents Success in One Area from Masking Low Performance in Another

$1M

Dollar Goal

30

Points Value

45

Points Cap

Points Earned for Dollar Goal Performance

MGO	Dollars Raised	Percentage of Dollar Goal Attained	Points Earned
MGO A	$870,000	87%	26
MGO B	$1,500,000	150%	45
MGO C	$2,000,000	200%	45

Although 200% of 30 points is 60, the points cap limits MGO C to 45 points

Emphasizing Individual Performance

While Montana State's Alumni Foundation features a points cap in its metrics system, Vanderbilt University's system features three other unique practices.

First, it features a team goal as part of its points system. This is worth 30 points out of a total of 300.

Over time, Vanderbilt has increased the number of points awarded on individual performance metrics, like gifts closed and dollars raised, which now comprise 195 out of 300 total points.

Most importantly, while there is a points cap in some categories, there is no cap on points awarded for dollars raised.

In this system, MGOs are unable to compensate for poor performance in dollars raised by beating the visit goal. But what about the opposite? What if someone exceeded dollar goals by 400%? Shouldn't the MGO be recognized for this achievement?

At right, you'll see how the math works. Let's say an MGO exceeds the highest goal—the reach goal—by 40%. He receives 105 points for hitting the threshold, target, and reach goals, and on top of that, since he exceeded the highest expectation by 40%, receives an additional 14 points (40% of 35), for a grand total of 119 points.

Recognizing Fundraisers Who Beat Ambitious Dollar Goals

A Partial Sampling of Metrics with Three-Tiered Goal System[1]

Metrics	Points Earned at **Threshold**	Points Earned at **Target**	Points Earned at **Reach**	**Maximum Points**
Dollars Raised by Team	10	10	10	**30**
Dollars Raised by Individual	35	35	35+	**105+**
Number of Solicitations Funded	30	30	30	**90**

Leadership changed the percentage of evaluation allotted to dollars raised by individual and closed gifts from 50% to 65%.

No Cap on Dollars Raised by Individual

For example:

If all three-tiered dollar goals are 35 points each and the development officer surpasses her reach dollar goal by 40%, she would earn:

$$(35 + 35 + 35)$$
$$+$$
$$40\% \text{ of } 35$$
$$=$$
$$\textbf{119 points}$$

Results of Metrics Implementation

33%
Increase in solicitations

80%
Increase in Leadership Annual Giving dollars

1) The full metrics system includes points for personal visits (30), solicitations made (30) and money raised by the university (15), for a total of 300+ points possible.

Source: EAB interviews and analysis.

Lower Pressure, Higher Quality

Our next two profiles come from institutions that have defied conventional wisdom in order to enhance productivity by adopting a "less is more" philosophy with regard to metrics.

Washington State University set up three goals, listed at right, during their most recent campaign. However, after analyzing their performance data, they discovered that only 24 major gift solicitations were necessary to meet the goal of 10 gift closures, and not the 36 solicitations they had originally set as a goal.

They lowered the goal to 24 from 36 and, without verbalizing the expectation of higher-quality solicitations, they increased production. As you can see at right, the gift yield rate—the proportion of proposals submitted that resulted in a gift—increased from 30% to 44%. Additionally, the size of gifts increased.

While counterintuitive, lowering goals increased production. Indeed, the lower goal created less pressure for low-quality proposals and actually led to more dollars.

Washington State Achieves Success with Lower Goals

Original WSU Targets

150 visits per year

36 major gift solicitations per year

10 closures per year

! **Low yield rates** caused WSU to conduct an internal analysis of its target levels

Analysis revealed that **only 24 solicitations were required** to close 10 gifts per year

Decrease in required solicitations

36
⬇
24

Increase in major gift yield rate

30%
⬇
44%

The size of gifts has also increased

❞

"You get what you measure. We wanted to shift the focus to quality versus quantity. Our major gift officers ended up taking the time necessary to find the sweet spot between donor desires and institutional needs. Metrics should be set appropriately to your organizational circumstance and revised accordingly."

Mark Hermanson
Executive Associate Vice President
Washington State University Foundation

Source: EAB interviews and analysis.

Dunbar and Development Don't Mix

Portfolios Have Become Large and Unmanageable

Dunbar's Number

150

Oxford anthropologist Robin Dunbar determined based on the size of an average human brain that we can maintain stable social relationships with 150 other people

"Approximately how many prospective donors are in your fundraising portfolio?"

2014 EAB MGO Survey

n=1,217

22%

13%

29%

31%

Over half of MGOs have 101+ prospects in their portfolios

- 0-50 individuals
- 51-100 individuals
- 101-150 individuals
- More than 150 individuals
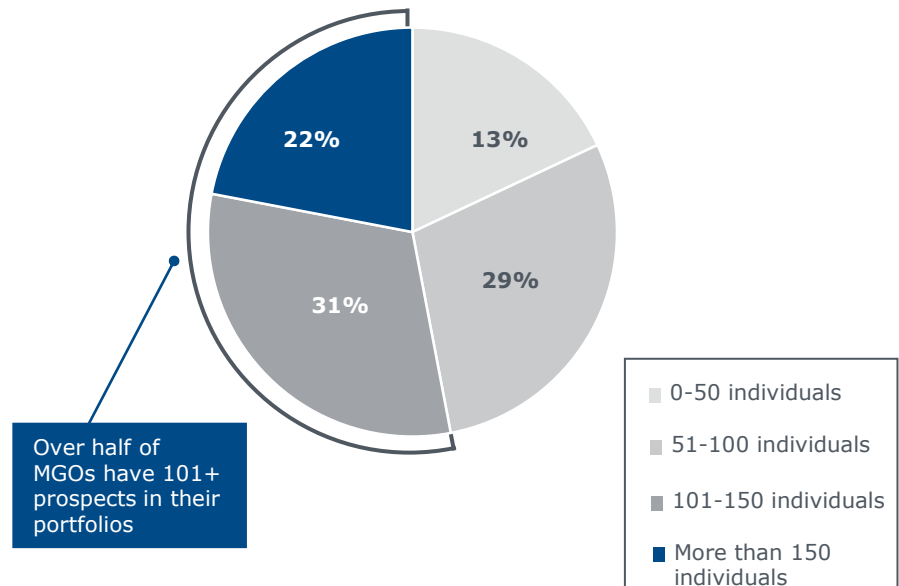
But it's not just lowering goals that we'd recommend. We also believe the industry needs to take a hard look at portfolio sizes.

We discovered after surveying more than 1,200 MGOs in 2014 that nearly 53% of them had more than 100 prospects in their portfolios. When we interviewed CAOs about portfolio sizes, the concept of "Dunbar's Number" was invoked to justify portfolios containing a large number of prospects.

Robin Dunbar is an Oxford anthropologist who determined based on the size of a human brain that the number of people the average person could have in her social group was 150. Anything beyond this figure would be too complicated to handle at optimal processing levels. Dunbar's number is often cited as

the reason why portfolios typically consist of 125 to 150 prospects.

After conducting analyses of optimal portfolio sizes, we have concluded that Dunbar and development don't mix. Most people forget that we already need to have about 50 to 100 stable social relationships in our personal lives. That leaves room for only 50 to 100 meaningful relationships in one's work life. When you consider all the other relationships an MGO needs to have (e.g., with colleagues in planned giving and stewardship, deans, and faculty), this leaves little remaining relationship bandwidth. It is unrealistic to expect that MGOs can maintain meaningful relationships with more than 50 to 75 prospects. Recognizing this reality, some universities have begun experimenting with smaller portfolio sizes.

Source: EAB interviews and analysis.

Wildcats Win with "Less Is More"

Portfolio Size Reduction Yields Manageable Prospect Pool

Northwestern University has pioneered an innovative strategy with regard to portfolio size reduction. The university recognized that too many prospects were lying fallow in MGO portfolios. After conducting portfolio penetration analysis of 17 MGOs in the central development department, leadership learned that 65% of the prospects in these portfolios had not been visited over the course of a full fiscal year. These prospects, identified as high affinity and high capacity, were effectively being excised from all fundraising touches, as they were not being visited, nor were they allowed to be touched by annual giving efforts.

Prior Portfolio Penetration

- 65% of portfolio was not visited within one fiscal year
- Locked in portfolio, prospects received no additional fundraising touches (e.g., annual giving)

Fallow Prospects

35%

- An average of 40 prospects received visits per fiscal year
- These were the only prospects in active fundraising stages

Active Prospects
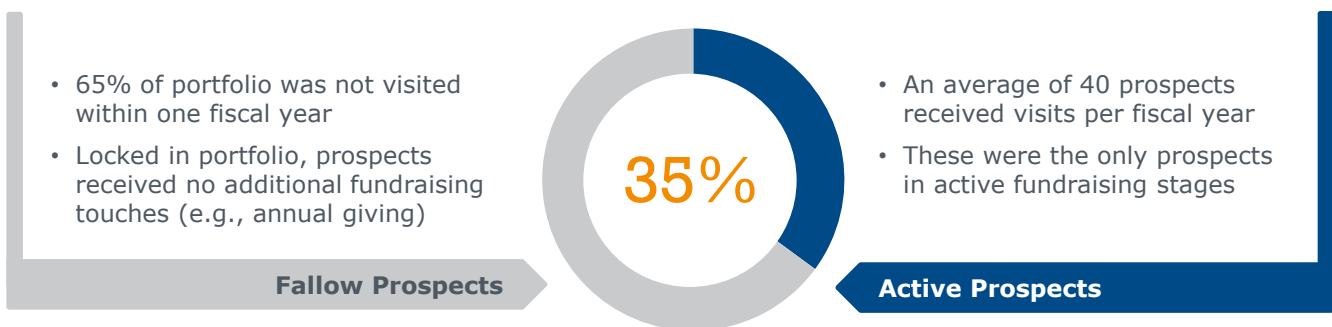
> "The whole concept of assignment seems to be flawed and strangely skewed towards having a large list of names assigned to you, versus, 'these are the 30 people that I'm planning to solicit over the next 24 to 36 months.' Shops have portfolios of 120-150 because some fundraising consultant 20 years ago told them to and they never second guessed it."
>
> *David Lively*
> *Associate Vice President, Alumni Relations and Development*
> *Northwestern University*

Source: EAB interviews and analysis.

Wildcats Win with "Less Is More" (cont'd)

Portfolio Size Reduction Yields Manageable Prospect Pool[1]

Old Portfolios

40 visited prospects

75 unvisited prospects

Suggested New Portfolios

30–40 total prospects

Now all prospects in a portfolio must have an **ask date, ask amount, expected gift close date, and gift design**

170% ↑
Increase in number of asks

211% ↑
Increase in number of gifts

595% ↑
Increase in dollars raised

Figures above refer to the *same fundraisers* compared over two-year period

Northwestern now allows portfolios to have as many as 50 prospects but prefers for them to contain 30 to 40 prospects.

To be in the portfolio there must be an ask date, ask amount, expected close date, and gift design in the system. In short, Northwestern is now tracking proposals rather than assignments.

Between FY2012 and FY2014, the same fundraisers (before the policy change and after) have increased their number of asks by 170% and their number of

gifts by 211%. Most importantly, the dollars raised figure has gone up by 595% for these 17 fundraisers.

A key point is that this figure of 30 to 40 prospects does not include prospects in stewardship. Another important point is that this tactic is most relevant for advancement shops that have a highly qualified prospect pool, since this tracks proposals rather than assignments.

Consensus Through Committee

Iowa State Univ. Foundation Secures Buy-In Through a "Bottom-Up" Approach

MGO Committee Formed → **Final Metrics Selected and Presented** → **Metrics Disseminated to Staff**

- Leaders select cross-section of staff (nine people)
- AVP of Development provides oversight to ensure quality control
- Task force creates a plan, sends members out to do best practice research

- Group presents recommendations to advancement leaders
- Metrics adopted "as is"; two additional metrics added

- Co-chairs conduct presentation at development staff meeting
- Director of Research meets individually with each team and each fundraiser

Committee Charge

- Do we use the right metrics?
- Should we even have metrics?
- What metrics should we add?

While setting appropriate expectations and creating more realistic goals for MGOs are integral to the development of a strong performance management system, securing buy-in from MGOs on metrics is also critical for success. The absence of MGO investment in metrics can be a recipe for poor compliance, low morale, and even lower productivity.

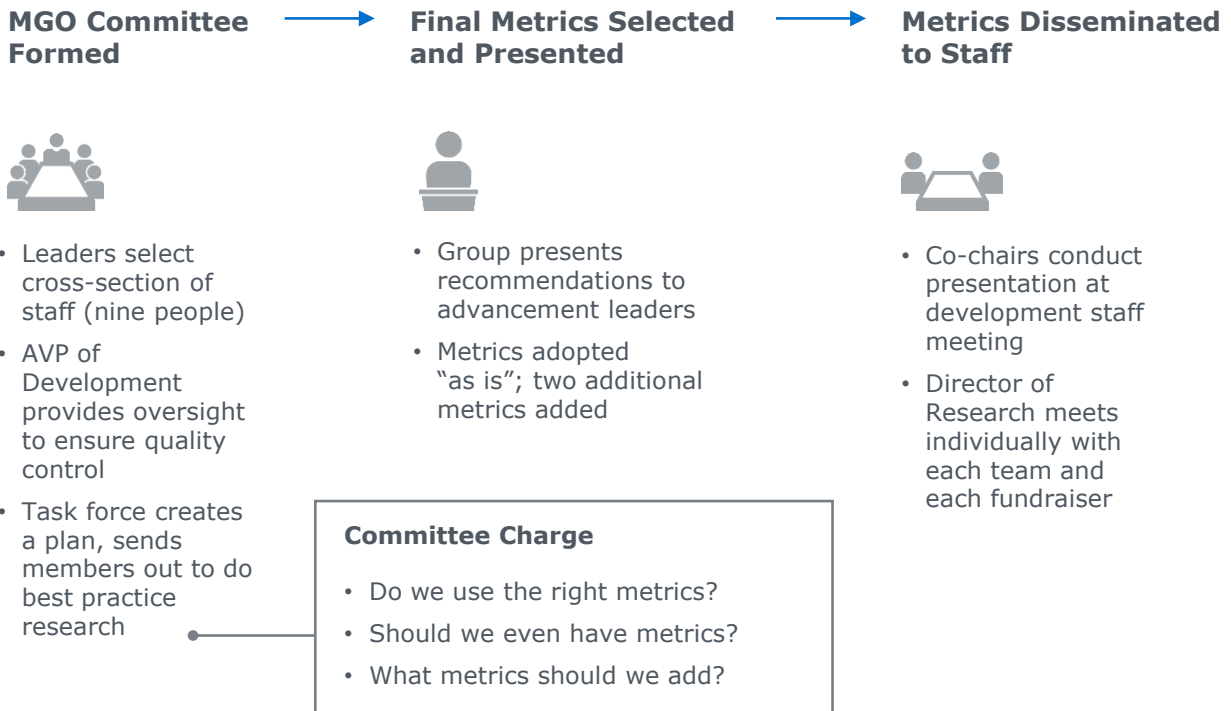A excellent example of securing buy-in comes from Iowa State University, where metrics were developed by using a staff committee. This committee of nine was selected based on which staff expressed interest in metrics and which might have the most insight into MGO goals. A cross-section of staff (i.e., recent hires as well as someone with 20+ years of experience) was chosen; one person on the committee was a member of the leadership team, which helped ensure buy-in from the VP.

The committee was given free rein to explore metrics outside of the three already used. The group reached out to peers for best practices and ultimately added two metrics to the existing list.

The task force presented at the end of the project to the senior leadership team. Leaders made no changes to the recommendations, partially because the AVP for Development had been on the committee and had updated the leadership team unofficially along the way.

The co-chairs then did a presentation at a development staff meeting and met individually with each team and each fundraiser. Thus the MGOs were selling it to their peers.

This strategy of securing buy-in from MGOs stands in stark contrast to the "handed down from on high" approach we observed many institutions undertake without consideration of the lack of compliance typically associated with such an approach.

Source: EAB interviews and analysis.

EAB

KPIs with Teeth

Creating a Culture of Accountability

PART
2

Transparency Breeds Accountability

Performance transparency, or the amount of staff that can see performance reports, varies greatly among institutions. Some advancement leaders feel that achievement of performance targets is information too sensitive to be widely shared. These decisions depend largely on what data and personal information is included in the dashboards.

Advocates for increased transparency publish weekly reports, emailing them to the entire staff or displaying them on screens during meetings. They argue this visibility into peer performance can create positive competition and pressure to perform. It creates opportunity for fundraisers to share their successes and ask for advice. Finally it allows fundraisers to understand how their performance fits into the context of the office.

Other advancement shops prefer to use managerial dashboards only as tools for managers to oversee their staff and do not share the dashboards with fundraisers themselves. Managers can see the performance of those who work for them, as well as notifications, warnings, and trends, and can use these to inform their conversations with staff. This ensures fundraisers benefit from dashboards' insight but don't feel that their performance is being displayed to peers without an opportunity for them to explain their behavior.

Building a Meritocracy Requires Openness

Weighing In on Transparency

Pros	Cons
• Clear understanding of performance expectations • No secrets • Best MGOs are often competitive • Clarity of purpose	• Difficult to include context (e.g., variability in prospect quality) • May breed jealousy among staff

Considerations

- How should the work of high performers be highlighted?
- How can deans best be kept apprised of the performance of their MGOs as well as those of other academic units?
- Should the performance data for advancement leaders be accessible?
- Should MGOs have access to metrics data of their peers via the reporting or dashboard tool?

Source: EAB interviews and analysis.

Without Teeth, Metrics Are Just Numbers

No system of metrics will work without carrots and sticks. Our research interviews uncovered that some advancement shops do good work on drawing a straight line between performance and consequences like promotion, probation, and termination. But for the most part, this is an area of opportunity for improvement for universities.

A performance management world without consequences is dangerous because of its impact on both top and poor performers. Indeed, top performers become dejected when they see their work going unrecognized, which causes them to seek alternative employment opportunities. At the same time, poor performers can hide behind a lack of accountability.

To be sure, there are challenges associated with greater accountability. Many CAOs have only dotted line relationships with unit-based MGOs and thus face an uphill battle with deans when an MGO needs to be placed on a performance improvement plan or even be terminated. Further, CAOs must partner with central HR, which may need to be educated on why MGOs are different from other staff and thus need a different metrics system.

But the work required to engage others on campus in creating more accountability for MGOs is vital to ensuring that fundraisers are incented to enhance their performance.

We Ignore a System of Consequences at Our Own Peril

A World Without Consequences

Your Superstar MGO

"I could do more, but it wouldn't really benefit me."

Your Lowest Performer

"Even if I don't hit my ask goal, what do I have to worry about?"

> **Our Last Mile Problem**
>
> "Metrics for development officers have been getting more press lately, but even though many VPs are interested in measuring performance, they fear integrating their metrics systems with the university's performance review process. Without a clear line between performance on metrics and specific consequences, why would anyone care about metrics?"
>
> *Carrie Collins*
> *Vice President for Institutional Advancement*
> *University of the Sciences*

Source: EAB interviews and analysis.

EAB Guidance for Metrics Implementation

CAOs considering creating a culture of greater accountability for their MGOs may want to begin by gradually acclimating their fundraisers to an environment characterized by formal metrics.

One such step is to set up a trial period for goals. CAOs may choose a shop-wide trial period of one year that essentially functions as a grace period. As some universities have done, you might consider making this transition when rolling out a new constituent relationship management system. During this rollout year, metrics are tracked and you talk about them, but MGOs aren't evaluated on them.

Some universities have experimented with offering a one-year trial period to all new fundraisers. Given the deluge of information new hires must contend with, introducing metrics to these individuals over a one-year period has been more effective in securing investment in their importance.

Two Approaches to Ensuring a Smooth Transition to Robust Metrics

Shop-Wide Trial Period

- Introduce new metrics with the introduction of a new CRM
- Offer one-year trial in which metrics are tracked but staff are not evaluated on them
- Use trial period to collect performance data to better inform target levels
- Trial period can also assuage concerns about how metrics will affect fundraising behavior

New-Hire Trial Period

- Offer to all new fundraisers a one-year trial period in which metrics are tracked but not included in performance evaluation
- Trial period offers an opportunity to assess the appropriateness of target levels, especially for fundraisers hired into new roles or unqualified portfolios
- Facilitates buy-in from new fundraisers who may feel overwhelmed by metrics in their first year

> "We wanted to give people time to learn the new metrics. The transition was also envisioned to make sure that people would continue to work in a donor-centric way with the new measures in place."
>
> *Andrea Engebretson*
> *Associate Vice President of Development & Managing Director*
> *University of Wisconsin Foundation*

Are Your MGOs on Track to Goal?

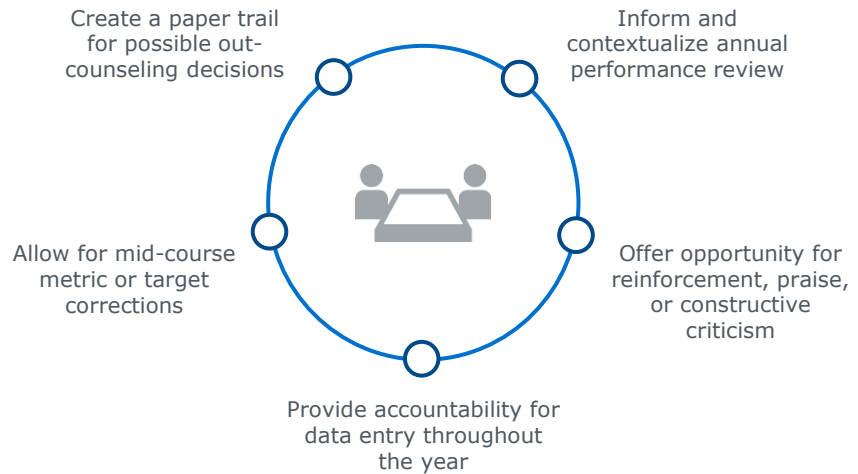Another step you can take when instituting metrics is to conduct more frequent performance check-ins.

University of the Sciences in Philadelphia conducts performance evaluations once every quarter. These are all saved in the personnel file and referred to at the end of the fiscal year to help inform and contextualize the final annual performance review.

These quarterly reviews allow for midcourse corrections, opportunity for praise, and constructive criticism. The template is not only quantitative, it offers space for subjective commentary on the metrics; The commentary can provide context on why one number may be low (e.g., Juan Smith was focusing on stewarding a large gift this quarter).

These check-ins also provide accountability for data entry, as they ensure that MGOs are entering their contact and visit information throughout the year. Finally, the check-ins provide a measure of protection for the institution, a "paper trail." These quarterly reviews can be useful in adverse employment situations, when the university is required to demonstrate that low performance had been consistent over time and communicated to the employee.

University of the Sciences Institutes Quarterly Performance Reviews

Advantages of Quarterly Performance Reviews

Create a paper trail for possible out-counseling decisions

Inform and contextualize annual performance review

Allow for mid-course metric or target corrections

Offer opportunity for reinforcement, praise, or constructive criticism

Provide accountability for data entry throughout the year

> "It allows you to provide your employees with mid-course corrections. It provides subjective information in support of objective pieces of data. So, for example, it's one thing to say Terry had a really slow quarter and not a lot of visits. Well if you look closely, Terry was busy closing a multi million-dollar gift that quarter, and all of her time and focus was on that particular donor. So you can also provide praise, constructive criticism, and guidance."
>
> *Carrie Collins*
> *Vice President for Institutional Advancement*
> *University of the Sciences*

Source: EAB interviews and analysis.

Metrics with Follow-Through

While gradually introducing metrics to your MGOs and checking in with them on a consistent basis with regard to performance are excellent ideas, the single most important step in ensuring investment in metrics is embedding them into the university-wide performance appraisal.
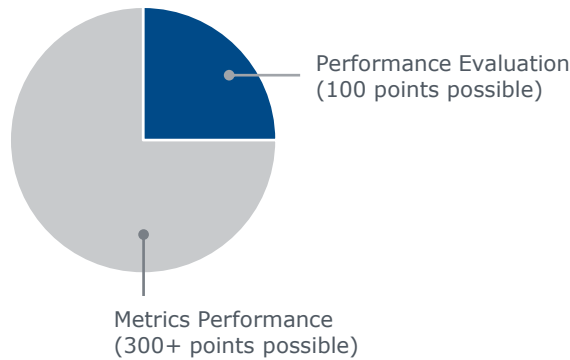
At right is Vanderbilt's approach to incorporating its fundraising metrics into MGO annual performance reviews.

As discussed earlier, total points possible on the Vanderbilt metrics system is 300. This figure is based on metrics such as gifts closed, visits made, and dollars raised. These 300 points are 75% of an MGO's overall review, with the final 100 points being related to more qualitative factors.

An MGO's overall score out of 400 is then linked to a grading scale with various evaluation categories. An MGO's "grade" is then tied to specific consequences, creating a transparent connection between performance and outcomes.

Vanderbilt Integrates Metrics Performance into MGO Reviews

Overall Performance Evaluation

Performance Evaluation
(100 points possible)

Metrics Performance
(300+ points possible)

Grading Scale

Outstanding

340

Meets

245

150

Exceeds

Needs Improvement or Unsatisfactory assigned at manager's discretion

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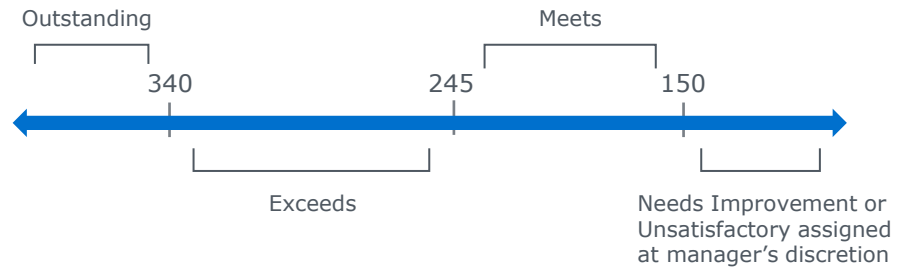
> **MGO Metric Acclimation**
>
> "Over time the questions have shifted from 'Why do we have metrics?' to 'Can you help me understand why this metric counts for this much as opposed to that metric counting for that much?' So I would say our experience was we had to…weather a period of time where people were acclimating to it, but now they have and the metrics are taken as a given."
>
> *Randy Smith*
> *Executive Associate Vice Chancellor*
> *Vanderbilt University*

Source: EAB interviews and analysis.

Can Happiness Be Bought?

There is a tendency in advancement to adopt a fatalist approach when it comes to MGO retention. We think of keeping high performers as largely being a function of participating in a salary arms race. Urban schools fret about local institutions poaching their MGOs and rural institutions worry about attracting MGOs to remote regions. It's certainly true that competitive compensation is important when it comes to recruiting and retaining the best. But is it really true that money can buy happiness? According to the research, the answer is "no."

A few years ago, a research study concluded that after reaching—on average—$75,000 in compensation, salary ceased to play a significant role in day-to-day happiness.

Indeed, non-financial factors play an important role in motivating staff members.

Vast Body of Research Resoundingly Debunks Myth

HBR

Does Money Really Affect Motivation?

- Authors reviewed 92 quantitative studies including over 15,000 individuals
- Less than 2% overlap between pay and job satisfaction levels

TIME

New Study Puts Figure on Happiness: $75,000

GALLUP

No Significant Difference in Employee Engagement by Pay Level

Is Cash Really King for MGOs?

EAB's own research aligns with the conclusion that non-financial factors play an important role in staff motivation.

We conducted a wide-ranging survey of over 1,200 MGOs in 2014 and found that while an annual cash bonus is important, it's not the most important form of recognition MGOs prefer for meeting and/or exceeding performance goals. And while you may have your hands tied with annual cash bonuses, ensuring your MGOs feel recognized by leaders is very much within your locus of control.

Survey Says, "…Not Exactly"

"What kinds of recognition do your prefer for meeting and/or exceeding performance goals?"
EAB 2014 MGO Survey
n=1,217

Recognition type	%
Recognition by direct or senior manager	**69%**
Annual cash bonus	**68%**
Increased management responsibilities	**40%**
Better job title	**35%**
Recognition by development colleagues	**24%**
Recognition by administration and volunteers	**23%**
Recognition by donors	**17%**

CAO recognition outranks even cash bonuses
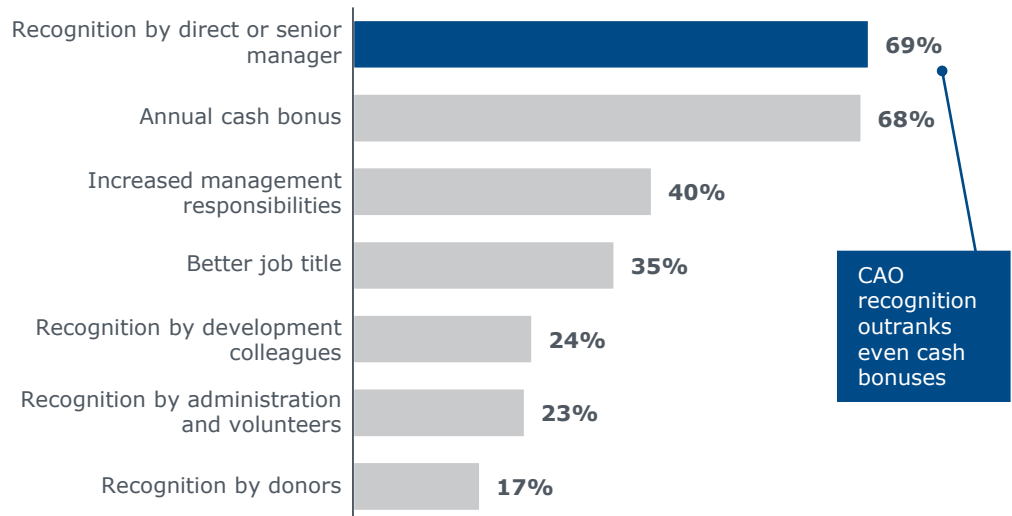
Source: EAB interviews and analysis.

Showing Appreciation

At right, you'll find five examples of how to show appreciation to your MGOs.

Whether small "on-the-spot" gift cards given from advancement leaders to staff or flexibility in vacation time, finding ways to reward fundraisers doesn't require significant financial commitments.

Myriad Methods to Increase Engagement and Productivity

Flex-time, additional time off, and vacation re-allocation

Gift cards, recognition plaques, and on-campus memberships

Peer-nominated staff and performance awards

Personalized thank-you notes from leadership

Donor, board member, or constituent appreciation stories

Appreciation Less Costly Than You Think

"When I was at the University of Idaho, the president approved a modest bonus pool for each university division. The maximum bonus amount was just $500, but I had staff in my office in tears. It wasn't the dollar amount. It was the fact that we were saying, 'Thank you, we recognize that you've worked hard and we value you.' The dollar amount doesn't have to be enormous—ideally more than $500—it just needs to be an amount that recognizes, rewards, and thanks team members for doing well what you've asked them to do."

Chris Murray
President and CEO
Montana State University Foundation

Source: EAB interviews and analysis.

Equity Does Not Mean Equality

We recommend a four-step process to set up a recognition program for your MGOs.

Start by asking MGOs what they value and are interested in. Opera tickets may have tremendous value to one person, while lunch with the CAO might be another's dream.

Next, pay close attention to what motivates your staff.

After that, be sure to write down examples of outstanding behavior you observe. This is a critical point, as advancement leaders are busy and can easily forget these things unless they make a note of them.

Finally, choose the appropriate mechanism to reward your staff—for some, this may be in private, for others, at a team meeting.

Rewards Tailored to Individual Preferences

Know Your Staff

A Four-Step Process to Customize Staff Rewards
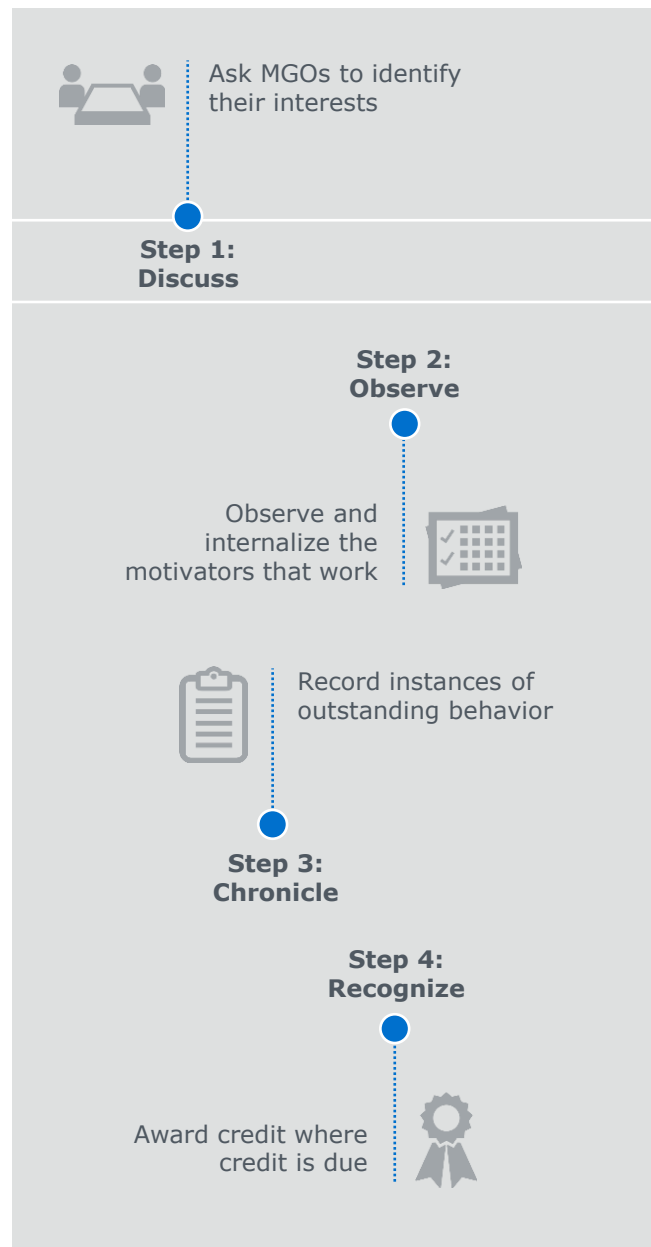
Ask MGOs to identify their interests

Step 1: Discuss

Step 2: Observe

Observe and internalize the motivators that work

Record instances of outstanding behavior

Step 3: Chronicle

Step 4: Recognize

Award credit where credit is due

Not Your Dad's Incentives

An excellent example of an advancement staff recognition program is that of Clemson. The university's DAD program measures donors visited, asks made, and dollars raised. Weekly winners in each category are announced in a "TGIF email," which is received by fundraisers and deans.

At monthly meetings of all fundraisers, leaders review DAD goal performance and high performers discuss how they were able to achieve this success. The winners receive small gifts (under $25 as a rule) such as mugs and pajama pants.

Clemson reports that this program has been successful in increasing engagement among deans, building a sense of camaraderie among staff, and decreasing prospect hoarding behaviors.

Clemson Rolls Out Recognition Program for Fundraisers

DAD™ Program Metrics

Donors visited

Asks made

Dollars raised

Recognition Channels

Weekly email

Monthly meeting

Annual award

Rewards Offered

Fun vouchers

University-branded mugs

Clemson Tiger apparel

Boosting Morale and Collegiality

"Collegiality in our division has increased substantially, even though the rewards are small. Deans have gotten very involved in the recognition process and are excited about their fundraisers. Prospect 'hoarding' has also lessened with the increased focus on teams."

Missy Ryan Penland, Senior Director of University Development
Clemson University

Source: EAB interviews and analysis.

Putting Your Money Where Your Metrics Are

While recognition programs have tremendous value, many CAOs are also interested in experimenting with variable compensation[1]. Dalhousie University in Halifax, Canada, has reported success with its unique incentive compensation program.

Dalhousie features an incentive compensation system in which a range of goals are weighted at different levels based on manager discretion. Then, at the end of the year, if an MGO hits a target, the specific metric's weight is multiplied by 8%. If he hits the stretch goal, this weight is multiplied by 10%.

Dalhousie Finds Success with Incentive Compensation Plan

Incentive Compensation Calculation

8% or 10%   x   10%–50%   =   Bonus Reward

Goal Multiplier

- If an MGO hits her target level for a specific metric, that metric's goal multiplier is 8%
- If an MGO hits her stretch level for a specific metric, that metric's goal multiplier is 10%

> If MGO fails to hit target *or* stretch level for a specific metric, that metric's goal multiplier will be 0%

Weighting

- Depending on a staff member's experience, supervisors will consider certain goals more or less important, giving them more or less weight during bonus calculation

Source: EAB interviews and analysis.

Putting Your Money Where Your Metrics Are

At right are examples of MGOs who would be eligible and ineligible for incentive compensation.

An important point is that fundraisers who satisfy all goals *except* their dollar goal—as in the case of MGO B at right—are not eligible for *any* incentive compensation. By contrast, were an MGO to hit the dollar goal and fail to achieve one or more other goals, she would still be eligible for some incentive compensation. This system is set up to ensure that satisfaction of the dollar goal is a baseline requirement to receive any bonus at all.

MGO A: Example of Incentive Compensation *Earned*

Metric	Goal	Achievement (stretch/target /below target)	Bonus
Number of Face-to-Face Visits	15/mo	Target	8% x 20% = 1.6%
Number of Major Gift Commitments Secured	10	Target	8% x 20% = 1.6%
Aggregate Value of Major Gift Commitments Secured	$1.1 million	Target	8% x 50% = 4%
Other	TBD	Target	8% x 10% = 0.8%
		Total Bonus	8%

MGO B: Example of *Failure to Earn* Incentive Compensation

Metric	Goal	Achievement (stretch/target /below target)	Bonus
Number of Face-to-Face Visits	15/mo	Target	8% x 20% = 1.6%
Number of Major Gift Commitments Secured	10	Target	8% x 20% = 1.6%
Aggregate Value of Major Gift Commitments Secured	$1.1 million	Below Target	0% x 50% = 0%
Other	TBD	Target	8% x 10% = 0.8%
		Total Bonus	0%

Due to top priority of dollar goal, failure to hit target in this category would render MGO ineligible for bonus reward

Source: EAB interviews and analysis.

Campus Collaboration Creates Career Choices

Pitt's Unique Partnership with HR Reaps Dividends

Tying compensation and recognition to performance is important to instill accountability into an advancement shop. Another method is to embed metrics into the fabric of an MGO's career trajectory, showing new MGOs (and even prospective MGOs) that meeting goals leads to a long-term career in the advancement shop.

At the University of Pittsburgh, administrators developed a career ladder in 2014 because of low retention among MGOs along with limited management positions available—they wanted to signal to MGOs that there were individual contributor roles for them based on achievement of specific goals.

Motivations to Develop a Career Ladder

1. Low MGO retention
2. Lack of visibility into possible career paths for MGOs
3. Limited management positions available
4. No individual contributor role promotion options

Working with HR to Develop a Career Ladder

Analyze historical university advancement data to determine appropriate goals for each level

Educate HR about the differences between fundraisers and other university staff

Stress the objectivity of the promotional structure and the difficulty of performance required for promotion

Timeline for Career Ladder Development

January 2014
Secured buy-in from chancellor's chief of staff to work with HR on a fundraiser career ladder

June 2014
Analyzed 13 years of historical fundraiser data to develop career levels and goals

November 2014
Implemented the Charitable Relationship Manager system

March 2014
Formed a working group of advancement leaders and HR compensation analysts

August 2014
Reached out to peer institutions to investigate individual contributor promotion options

Building this career ladder was no small task. After securing buy-in from the chancellor's office, advancement leaders worked with the central university HR division, analyzed 13 years of fundraiser behavioral data, and interviewed peer institutions to discover best practices. The result was a tiered system in which fundraisers advance levels upon reaching goals.

Source: EAB interviews and analysis.

Innovating, One Step at a Time

There are five laddered positions in the "Charitable Relationship Manager" (CRM) ladder. After three years of performance in one position, an officer is eligible for promotional review. The guidelines outline both expected metric performance levels and performance levels that qualify as exceptional and deserving of promotion.
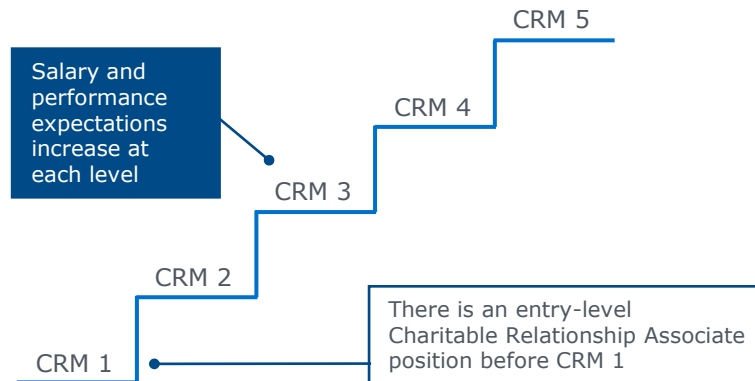
If it is determined that an MGO has exceeded all of her metrics consistently across three years, she is promoted to the next level and receives new metrics. Because performance is based on three years, MGOs have to demonstrate sustained top performance.

The promotion evaluation also takes into account the annual HR evaluations, which include more qualitative elements (e.g., donor focus, collaboration, technical skills). If an MGO receives a "needs improvement" in any of these categories, she will also not be promoted at the end of the three years.

At right is a sample standard goal—which enables a fundraiser to keep her job—and sample goal for advancement—which enables her to be promoted.

Administrators stress that compensation bands within each of the CRM levels are flexible to ensure adjustments can be made based on tenure and other variables.

MGO Career Ladder Integrated with Annual Performance Review

Salary and performance expectations increase at each level

CRM 1
CRM 2
CRM 3
CRM 4
CRM 5

There is an entry-level Charitable Relationship Associate position before CRM 1

Promotional Reviews Incorporate Annual Evaluations

Successful annual evaluations each of the three years reviewed are also required. This ensures that qualitative performance (e.g., collaboration, professionalism) is also factored into the promotion decision.

Requirements for Promotion[1] from CRM 1 to CRM 2

Metric	Standard Goal	Goal for Advancement
Fundraising Visits	45	45
New Pledges and Outright Gifts	$200,000	$500,000+
Agreements Sent	6	6
Agreements Accepted	4	4
Total Contacts	1,000	1,000
Origination Gifts[2]	2	3

1) These metrics are based on a three-year average.
2) Gifts in which the donor(s) have never been placed in active management prior to being qualified.

Source: EAB interviews and analysis.

EAB

Data as a Means, Not an End

Utilizing Performance Analytics to Support Decision Making

3

Changing Behavior…One Data Point at a Time

Once a robust metrics system has been created and accountability measures have been taken to ensure adherence to (and even motivation by) it, CAOs will be in a strong position to use data and analytics generated from this system to empower MGOs to enhance their day-to-day decision making with regard to prospect prioritization.

Data Empowers MGOs to Make Better Decisions Before It's Too Late

- Which prospects should I focus on this week?
- Have any of my prospects been in a stage for too long?
- Relative to last year, am I on track to goal?
- What does my performance look like compared to peers?

> "We focus on monthly performance reports so that we are continually tracking and analyzing our progress. We want our fundraisers to always know where we stand vis-à-vis our goals and expectations, so that adjustments in strategies and action plans can be made in a timely fashion."
>
> *Brodie Remington*
> *Vice President for Advancement*
> *Stevens Institute of Technology*

Source: EAB interviews and analysis.

EAB's Top Tips for Dynamic Design

Much of an advancement shop's success hinges on its ability to deliver to MGOs the right information at the right time in the right format. To that end, at right is EAB's guidance for reporting and dashboard tools.

Optimizing Your Existing Reporting or Dashboard Tools

What?

☑ Display progress to goal indicator and forecasting projections

☑ Where relevant, use ratios rather than mere numbers

☑ Show year-over-year comparisons

How?

☑ Utilize report or dashboard space wisely, prioritizing key data points

☑ Leverage diverse modalities (e.g., charts, graphs)

☑ Use color appropriately

Who?

☑ Carefully create recipient list

☑ Consider highlighting performance of high performers

When?

☑ Update on a consistent basis

☑ Distribute at key prospect aging points

> 99
>
> "100% of the analysis that goes unused is wasted."
>
> *Ashutosh Nandeshwar*
> *Director, Prospect Development and Analytics*
> *California Institute of Technology*

A Layer of Sophistication

Colorado State Rolls Out Dashboard to Guide MGO Decision Making

Dashboards are the most effective and efficient method of delivering relevant information to busy MGOs. Colorado State University (CSU) created an in-house platform for its MGOs that functions as a "skin" on top of the advancement CRM, Advance. The homepage of this dashboard features top-of-mind items like tasks and notifications, but also includes summary statistics crucial to the MGO's goals.

All possible reports are listed in this bar

This dashboard is a skin built on top of Advance Web Access

Tasks and notifications are listed to prompt next steps

Users can click through to see more detailed information

Homepages can be customized to display the most important visualizations for each gift officer

A One Stop Data Shop

Dashboard Includes High-Granularity Data Available On Demand

The prospect-level dashboard contains much more detailed information on a prospect-by-prospect basis. From gift capacity to stage to proposal amount, the data points available through this dashboard provide MGOs with actionable information at their fingertips. Columns in the dashboard can be rearranged, and users can click on prospect names to quickly view additional biographical information on each prospect.

In addition to this prospect-level information, CSU also color codes its prospects on the basis of priority.

Individual Gift Officer's Prospect Portfolio Dashboard

Page is mobile friendly and has a Google Maps function

Columns can be dynamically rearranged according to the user's interest that day

User can drill down into more specific prospect information, log contact reports, or de-assign himself from the prospect

Includes sunset date; system will automatically notify MGOs of upcoming sunset dates

Colors of the Rainbow

Every dashboard should be informed by the goals of the institution that uses it. The choice of metrics displayed on the dashboard can influence fundraiser behaviors, but so too can the choice of visualization.

Colorado State University wanted its fundraisers to better understand their time allocation in relation to their prospects' capacity and readiness. To do this they broke out all portfolios over four colored quadrants: high capacity and high readiness, high capacity and low readiness, low capacity and low readiness, and low capacity and high readiness. Then they divided other metrics (e.g., visits, solicitations) into these color-coded categories to reveal how often fundraisers were focusing on the right prospects.

Over the last five years, CSU has witnessed a 218% increase in production (from $55 million to $175 million).

Although not all of this growth can be attributed to the visualization profiled above, leaders at CSU note that their reformatted dashboard has greatly influenced a switch in focus for their fundraisers

CSU Color-Coded System Facilitates Immediate Comprehension

Revealing Trends by Capacity and Readiness

High gift capacity High readiness	High gift capacity Low readiness
Low gift capacity Low readiness	Low gift capacity High readiness

Meaningful Contact Reports Broken Out by Color

Prospect Code	#	% Contacted in Last 6 Months	% Not Contacted in Last 6 Months
Green	22	95%	5%
Yellow	40	55%	45%
Blue	0	N/A	N/A
Red	21	19%	81%
Total	**83**	**57%**	**43%**

Typically CSU tries to maintain 75% of the portfolio in green and yellow

Trend: This MGO is focusing her visits on donors likely to give soon

Source: EAB interviews and analysis.

Performance at a Glance

While CSU's in-house dashboard has been a successful tool for MGOs, other institutions have partnered with vendors to provide MGOs with access to relevant data in a visually compelling and actionable format.

One such example is the partnership between University of North Carolina at Charlotte and Alignment Partners, a company offering an innovative solution for fundraiser time management.

Alignment Partners' Complete Prospect software is a mobile-optimized reporting tool that consolidates information on prospects in an MGO portfolio into a simple series of numbers.

UNC Charlotte Partners with Vendor to Enhance MGO Decision Making

System Elements

Efficient and intuitive

Simplifies reporting and reduces reporting responsibilities of advancement services

Drives activity

Mobile friendly

Progress to goal easily visible

Notifies of required next steps or overdue actions

Empowering MGOs to Do Their Jobs

"We can sell Complete Prospect to our development officers as a one-stop shop—it's intuitive and available to them on the road. Development officers are in control of their portfolios and can make every action count. They have immediate tracking on their next actions, goals, and forecasts. It's a visual cue that helps development officers optimize their time and determine actions needed to achieve success."

Jeff Creagh
Director of Prospect Strategy and Research
University of North Carolina at Charlotte

Source: EAB interviews and analysis.

Data for Action, Not Distraction

Stage Bar Organizes Information to Encourage Appropriate Next Steps

Many institutions struggle to display the proposal pipeline in their dashboards. By contrast, Complete Prospect has a compelling visual design for the proposal pipeline in its MGO dashboard known as the "stage bar." The stage bar quickly summarizes a portfolio's makeup and recent movement.

On the back end of the platform, managers can enter the maximum number of prospects per stage or days allowed in stage. When a prospect crosses over one of these thresholds, the stage bar alerts the viewer with a colored marker. This helps keep the pipeline moving, and fundraisers aware of upcoming next steps.

The Complete Prospect Stage Bar

- Quickly summarizes portfolio **makeup** and **movement**
- Alerts MGOs to necessary **next steps**

The four stages represented are Qualified, Contacted, Visited, and Asked. The fifth column of smaller numbers is the sum of the previous four columns. Numbers in the first row represent the total number of prospects in each stage. Numbers in the second row represent the number of "aged" prospects (i.e., prospects that have passed their sunset date) in each category.

For example, if an institution were to decide that a prospect may only stay in a stage for 60 days, on the 61st day of inactivity an aged prospect would drop below the stage bar (as seen above in the "Contacted" category). This alerts the MGO to the need for action.

Complete Prospect is a unique tool because it distills a massive quantity of information into a small series of numbers. MGOs using the tool can quickly ascertain what their time allocation looks like and the degree to which this has been optimized for engagement of top prospects. Additionally, the tool is synched to the advancement CRM, enabling contact reports to be completed within the software.

A Time Allocation Tug of War

Managers Are Pulled in Various Directions by Competing Priorities

Lest CAOs think prospect prioritization and time allocation only can be enhanced via technology, we came across a wonderful example of how to do this using people rather than digital tools.

One phenomenon that CAOs brought up time and again during our interviews was that managers—typically executive directors and AVPs—were being pulled in many directions and couldn't focus their energy on internal team needs, especially when they had their own portfolios. Their fundraisers needed guidance and strategic support, and these could only be provided by someone with frontline fundraising experience.

Competition for Manager's Attention

Visit with high-level donor in cultivation

Connect direct report MGO with data mining expert to surface new prospects for a specific campaign

External

Internal

Strategize for solicitation of $10M gift for Business School

Meet with direct report MGO who is struggling to schedule visits

Maintain portfolio of 50 principal gift prospects

Review staff's performance metrics

Source: EAB interviews and analysis.

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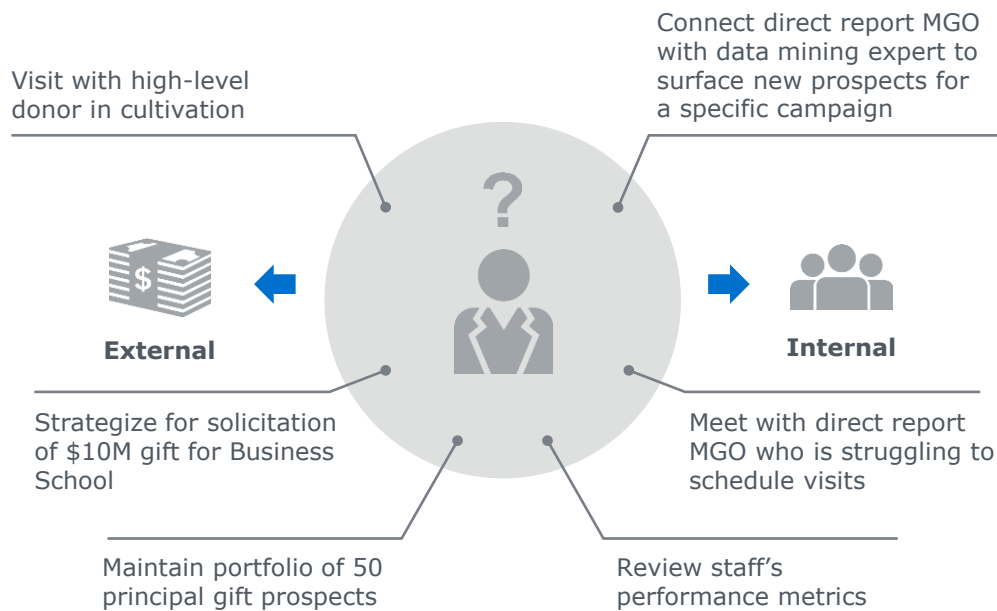
Engineering a New Management Paradigm

In 2011, senior fundraisers at the Massachusetts Institute of Technology who wanted a promotion and a raise were pulled into management positions without the requisite prospect management and mentoring skills. Managers often de-prioritized their internal responsibilities to direct reports in favor of "the hunt"—chasing down their own big gifts. This led to lower retention, little career development planning, and low quality control of fundraisers' performance. There was 58% turnover in frontline staff.

To address this, management created two new associate director positions that would function as fundraiser managers while holding no portfolios of their own. The belief of the leadership team was that while MIT could not provide better salaries or bonuses to attract higher retention, they could improve the culture and manager-managee experience. These positions manage portfolios, assigning prospects to the most appropriate fundraiser, and provide mentoring and oversight.

The two associate directors hired had experience in fundraising for higher education, which gave them legitimacy in the eyes of their managees.

MIT Introduces Leadership Roles Without Own Portfolios

Two New Associate Director Roles

Responsibilities:

- Select and assign prospects based on best interests of institution
- Partner with MGOs to determine optimal prospect time allocation
- Assist with strategy development
- Monitor performance metrics
- Mentor MGOs
- Connect staff to additional services (e.g., data mining experts, advancement services, prospect research)

> Both associate directors have frontline experience

"They balance responsibilities of accountability and of guidance… they talk to fundraisers about whether or not they're hitting goals, but also get into the details of a specific prospect's situation. They can sit down with a fundraiser and say, 'Hey, we're stuck here…let's reset the strategy.' That could be a $10 million discussion."

Mike McNally
Executive Director, Individual Giving (Former)
Massachusetts Institute of Technology

Managing to Exceed Expectations

At right are a sampling of impressive results MIT has seen from these two positions.

MGO turnover has declined from 58% to 3%; annual leadership gifts team revenue has increased from $24M to $72M; and the number of prospects in portfolios has gone up considerably because fundraisers can dedicate more time to fundraising.

New Roles Yield Lower Unwanted MGO Turnover and Increased Production

Results Over Three Years

95%
Decline in MGO turnover rate
(from 58% to 3%)

$48M
Increase in annual team revenue
(from $24M to $72M)

189%
Increase in prospects in portfolios
(from 1,900 to 3,600)

People Don't Leave Jobs—They Leave Managers

"I know that I'm not going to be able to offer amazing salaries and very progressive bonus programs. The next best thing for keeping staff in a market like Boston is to have great managers who are invested in staff careers. And I feel like that was an easier thing to get in an academic, nonprofit environment, because usually people leave because of organizational culture or their managers. And while everyone wants more money, if people feel like they're getting paid fairly, money isn't the reason why they leave."

Mike McNally
Executive Director, Individual Giving (Former)
Massachusetts Institute of Technology

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