**EAB**

# Maximizing Fundraiser Efficiency

Innovations in Major Gift Strategy

## 3 Ways to Use This Study

- Scale cultivation strategy development to meet donor expectations within current staff capabilities and time allocation.
- Equip managers with critical data to proactively address fundraiser productivity challenges.
- Realign gift officer responsibilities to win back time for donor-facing activities and strategy development.

Advancement Forum

# Advancement Forum

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# Executive Summary

## Questioning the Value of Investments in Major Gifts

Major gift officers (MGOs) often comprise the single largest staff investment within any development team, but chief advancement officers are increasingly questioning whether MGO productivity justifies the cost. Instead of investing in additional frontline fundraisers, advancement teams are increasingly considering how to grow fundraising productivity by helping current staff work more efficiently at every point in the cultivation cycle.

### MGOs Represent Largest Share of Development Personnel

*Average Full-Time Development Employees, FY2018*



Planned Giving **5%**
CFR **6%**
Leadership Annual Giving **7%**
Annual Giving **11%**
Development Support **25%**
**Major and Principal Gifts 47%**
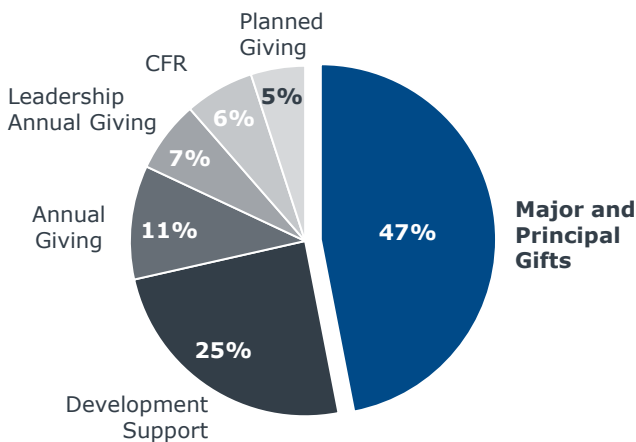
### Efficiency Concerns Span the Cultivation Cycle

> *Why aren't our fundraisers bringing in **more major gifts**?*

▶ Inadequate qualification calls

▶ Low number of visits

▶ Poor prospect coverage

▶ Long cultivation timelines

▶ Asks below capacity

Gift officers struggle with efficiency within every part of their workflow, from conducting qualification calls to managing multiple cultivation strategies at once and planning solicitations at donor capacity. Academic leaders consistently distract unit-based staff with requests for assistance with tasks unrelated to fundraising. At the same time, internal bureaucracy and decision-making processes often keep gift officers at their desks instead of connecting with donors and prospects.

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# Executive Summary (Cont.)

## Addressing the Efficiency Challenge

To move beyond fundraisers' current challenges, advancement teams should focus on three critical areas for improved efficiency. First, advancement leaders should provide MGOs with the tools to implement creative cultivation strategy without rewriting the playbook for every major gift prospect. Second, managers of frontline fundraisers should deploy goal-setting and data tracking to provide targeted, proactive coaching for MGO challenges and skill gaps. Third, advancement should take the lead in rethinking how MGOs spend their time in order to refocus on fundraising.

| 1 | 2 | 3 |
|---|---|---|
| **Develop Donor Strategy at Scale** | **Enhance Intermediate Goal Accountability** | **Realign Time Investments** |
| • Bring new hires up to speed quickly<br><br>• Meet donor demands without excessive customization | • Prepare managers for goal-setting conversations<br><br>• Leverage data analysis to identify workflow pain points | • Increase ROI of unit-based fundraisers<br><br>• Reduce jack-of-all-trades expectations for MGO responsibilities |

While this publication is designed for managers of major gift officers, the practices contained herein cross divisional lines to encompass how numerous advancement functions can work more effectively with frontline fundraising teams. Each section of this publication includes diagnostic questions for each practice and a holistic prioritization guide to decide which ideas to prioritize at your institution.

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# Introduction

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# Advancement Growth Focused on Major Gifts

## Institutions Staffing Up, Starting with Frontline Fundraisers

Higher education institutions are investing more than ever in their advancement teams, including growing the ranks of major gift officers (MGOs). Over the past three years, the Advancement Forum has measured increases in overall advancement investments, which include substantial growth targeted at development operations.

As a result of increased funding, development leaders are staffing up their frontline fundraising teams across the board, demonstrated by a 42% increase in the number of job openings for major gift officers across North America.

### Advancement Investments Reach New Highs

*Advancement Investment and Performance Initiative, FY2016-FY2018 Average*

**10.0%** Increase in **advancement** investment

**15.9%** Increase in **development** investment

### Major Gifts Team Expansion Is Top Priority

*Number of Job Postings for Development Officers at Colleges and Universities*

245 — Sept. '16

348 — May '18

**42% increase** in open positions
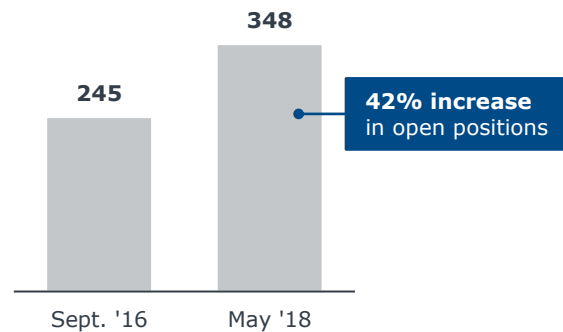
> I'm hiring three or four **new major gift officers** over the next two years. It's the top area where we're staffing up."
>
> *Vice President of Advancement*
> *Private Master's University*

# MGOs: The Lowest-ROI Frontline Investment

## Top Performers Mask Inefficiencies Within Fundraiser Ranks

While advancement leaders often prioritize MGO roles when expanding their teams, MGOs are the lowest-ROI frontline investment when compared to other development roles. They often raise less money per year than any other fundraiser with a portfolio, and their fundraising is carried by a small percentage of top performers. Most major gift success is based on the work of a small group of superstars, who bring in 79% of all major gift. Outside of this group, performance drops dramatically to levels well below chief advancement officers' expectations for these roles.

### Major Gift Officers Underperform Compared to Colleagues

*Average Fundraising Production by Role, FY2018[1]*

| Role | Amount |
|------|--------|
| VP or AVP | $18.5M |
| Principal Gifts | $12.4M |
| Planned Giving | $7.9M |
| CFR | $4.7M |
| Major Gifts | $2.9M |
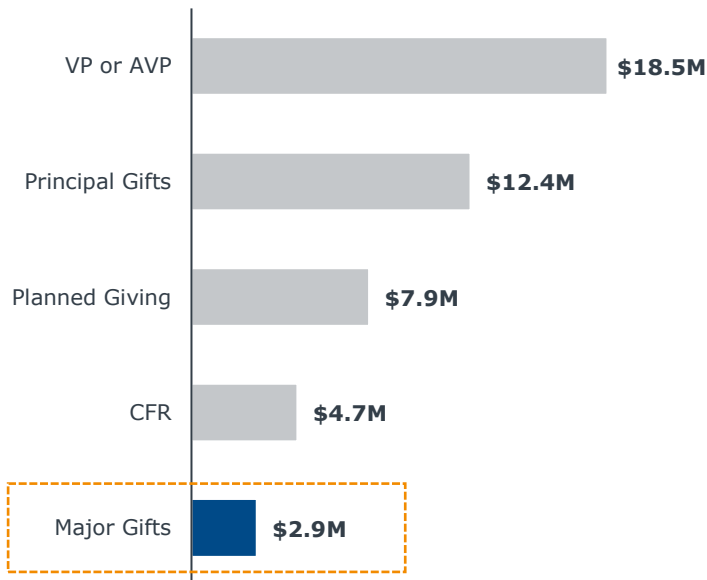
### Top Performers Carry the Team

*Average MGO Fundraising Production by Quartile, FY2018[2]*

$8.73M

Radical drop in performance beyond top 25% of MGOs

$1.35M

$0.14M

Top 25%    Middle 50%    Bottom 25%
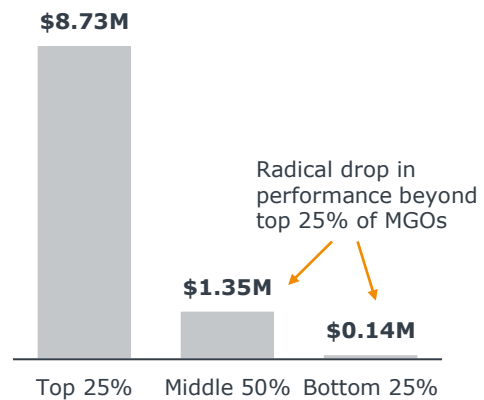
**49%** Of major gift officers raised **less than $500K** in 2018

# Hoping for the Best, But Expecting the Status Quo

## Hiring New Gift Officers Is Not a Guaranteed Route to Increased ROI

Many advancement leaders look to new hires as a solution to their current MGOs' low productivity. In theory, if advancement teams could hire four high-performing gift officers, total dollars raised and ROI would increase dramatically.

However, advancement leaders are more likely to hire reliable performers who bring in average returns per year. In the long term, their work will not dramatically change an institution's fundraising trajectory.

### ▶ Best-Case Scenario

Hire four superstar MGOs

**$34.9M** — Potential dollars raised per year

**200:1** — Estimated return on investment

### ▶ Most-Likely Scenario

Hire four average MGOs

**$5.4M** — Potential dollars raised per year

**54:1** — Estimated return on investment

Source: EAB FY2018 Advancement Investment and Performance Initiative dataset; Advancement Forum interviews and analysis.

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# CAOs' Sights Turn Toward Efficiency

## Working Smarter, Not Harder to Increase Major Gift Returns

Instead of relying on hiring additional fundraisers to increase total dollars raised per year, many advancement leaders are doubling down their efforts to enhance the efficiency of current staff. The Advancement Forum's 2019 Topic Poll showed that there is urgency across the industry to increase efficiency. Yet, further research showed that increasing efficiency is not a matter of changing one part of the MGO workflow. Advancement leaders have questioned why every part of major gift cultivation is not more efficient, including wondering why gift officers struggle to conduct enough qualification calls, to schedule the right visits, and to ask for gifts at donor capacity.

**Growing Urgency to Address Fundraiser Inefficiencies...**

**88%** Of polled CAOs were "interested" or "very interested" in **enhancing fundraiser efficiency**

" We're **spending more than ever on fundraisers**, but it's not moving the needle on our goals."

" Our **ROI should be through the roof**. What's the point of hiring more fundraisers if they're not going to bring in enough gifts to justify their salaries?"

**...Linked to Numerous Concerns**

*Why aren't our fundraisers bringing in **more major gifts**?*

▶ Inadequate qualification calls

▶ Low number of visits

▶ Poor prospect coverage

▶ Long cultivation timelines

▶ Asks below capacity

Source: Advancement Forum interviews and analysis.

# Identifying Barriers to Efficiency

## Three Pain Points Limit Majority of Gift Officers

Chief advancement officers' concerns about efficiency can be mapped to three main pain points. First, gift officers often spending substantial time planning the ideal cultivation plan from scratch for every donor instead of recycling the best aspects of past efforts. Even with this time investment, MGOs plan uninteresting cultivation steps that require customized collateral at every turn.

Second, gift officers lack clear intermediate goals to help them reach their metrics without getting sidetracked or running into dead ends. Managers do not see or proactively address red flags in their workflow that prevent them from doing their jobs efficiently and reaching their goals.

| 1 | 2 | 3 |
|---|---|---|
| **Reinventing the Wheel on Strategy** | **Lack of Clear Intermediate Goals** | **Non-Fundraising Activity Creep** |
| Strategy playbook rewritten for every cultivation cycle | Trial and error used to reach overall performance metrics | Asks across campus reduce valuable fundraising time |
| *Results* | *Results* | *Results* |
| • Uninteresting cultivation steps<br>• Customized collateral for one-time use | • Winding path from qualification to gift<br>• Results hide inefficiencies throughout workflow | • Inadequate time spent on the road<br>• Academic leaders assign all external-facing tasks to MGOs |

Third, non-fundraising activity creep often fills MGOs' time with responsibilities that do not directly relate to cultivating the prospects in their portfolios. Academic leaders and campus partners frequently rely on their fundraisers as jack-of-all-trades communications professionals, which prevents them from dedicating time to bringing in gifts.

Source: Advancement Forum interviews and analysis.

# An Acute Need to Increase Fundraiser Efficiency

## Fundraisers at All Performance Levels Stand to Benefit from New Approaches

Addressing fundraising inefficiencies will have benefits across major gift teams. While many managers seek strategies to take their current superstars to the next level, improving efficiency in fundraisers' workflow will benefit all performers and allow advancement shops to quality more prospects, move through cultivation more quickly, and bring in more gifts over time.

" I know that not every hire is going to be a superstar... The question on my mind is **how to make everyone on my team more productive**, regardless of where they rank right now.

Even **getting everyone to bring in 5-10% more gifts would have a huge impact on our bottom line** in the next few years."

*Vice President for Development and Alumni Relations*
*Private Research University*

Source: Advancement Forum interviews and analysis.

# Maximizing Fundraiser Efficiency

## Study Roadmap

Improving efficiency will rely on addressing three critical areas of major gift work: strategy development, goal accountability, and time management. The practices in each section of this study will enable frontline fundraisers and their managers to refocus on maximizing the value of core development activities without reducing the quality of the donor experience.

Use this study to change team-wide practices and/or to address individual challenges among frontline fundraisers.
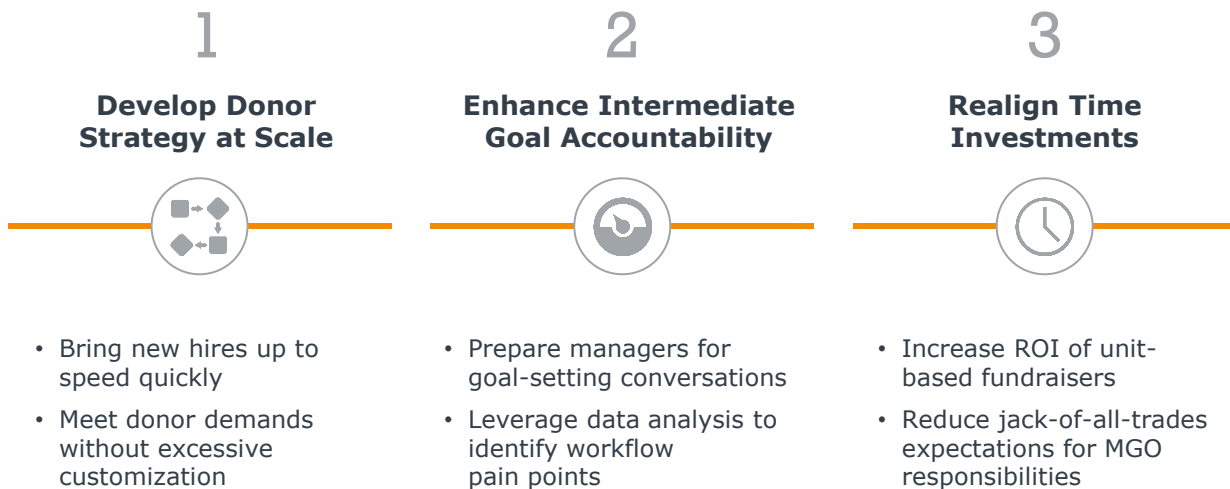
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- Prepare managers for goal-setting conversations
- Leverage data analysis to identify workflow pain points

- Increase ROI of unit-based fundraisers
- Reduce jack-of-all-trades expectations for MGO responsibilities

Source: Advancement Forum interviews and analysis.

# Develop Donor Strategy at Scale

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# Donors Demand a Transformative Experience

## Impact-Driven Cultivation Now Expected Across the Giving Pyramid

The expectations of major gift donors have become increasingly challenging for gift officers to meet. Today's top donors, identified as "donor-investors," share a philanthropic mindset characterized by a desire for transformative impact, hands-on engagement, and bold ideas. Development teams are accustomed to meeting these demands for a handful of individuals at the top of the giving pyramid, but this mindset has expanded down the giving pyramid and beyond advancement teams' capabilities. Major gifts have become increasingly customized, and annual fund supporters seek an "Amazon experience" with a wide selection of cause-based giving opportunities instead of one-size-fits-all unrestricted gifts.

### Donor-Investor Mindset Now Shapes...

Transformative impact

Bold ideas

Hands-on engagement

### ...All Levels of the Giving Pyramid

**Major gifts** require increased customization and lengthy proposals

**Annual giving** responds to donor demand for an "Amazon experience"

### From One-Off Meetings to Experiences at Scale

"As our **supporters want to have experiences related to their investment**, gift officers will have to be more involved in planning new kinds of engagement opportunities.

You used to be able to ask a faculty member to join a visit with you. These days, the donor is visiting campus, and they'd like to roll up their sleeves in the lab. **How do we scale that?**"

*Jeff Shilling*
*Associate Vice Chancellor, Philanthropy*
*University of California, Santa Cruz*

Major gift donors' demands have increased the pressure on major gift officers to curate unique donor-driven experiences throughout the cultivation cycle, a process that they do not have the time or capacity to oversee. Development leaders now wonder how to scale efforts to meet donor expectations without overburdening their teams or distracting from other responsibilities.

Source: Advancement Forum interviews and analysis.

# Stretching 'Status Quo' Strategy Past Its Limits

## Donor Expectations Complicate Traditional Major Gifts Pursuits

Major gift donors expect a bespoke cultivation process that stretches traditional strategy past its limits. They expect unique collateral and giving opportunities, and they want to track their impact with constantly-updated online portals.

But gift officers' strategy rarely reflects this mindset. Cultivation often starts with broad giving opportunities, like scholarships, faculty support, and facilities funding. Then, a slow timeline is applied to every gift, regardless of how quickly a prospect wants to act. After a slow cultivation process, stewardship focuses on paper reports and uninteresting event invitations.

### Donors Expect a Bespoke Process...

*"I expect the giving process to match my interests, mindset, and lifestyle."*

**Priorities Just for Me**

*Giving opportunities specially designed around my interests*

**Personalized Timeline**

*Processes that move as quickly as I do in business*

**On-Demand Reporting**

*Investment-style online portal to monitor my impact*

### ...Misaligned with Current Reality

**Gift destination**

❑ General student support

**Timeline**

❑ Two in-person meetings
❑ One email from the provost
❑ 18 months until ask date

**Stewardship plan**

❑ Paper impact report sent at end of fiscal year
❑ Invitation to on-campus luncheon

Source: Advancement Forum interviews and analysis.

# Develop Donor Strategy at Scale

## Strategies to Streamline Cultivation Processes

To meet donor demands without overstretching gift officers, development teams need to focus on developing donor strategy at scale, including rethinking visit scheduling, matching donor interests to institutional priorities, and strengthening strategy to move from cultivation to gift as effectively as possible.

### 1
**Reframe the Case for a Visit**

- Practice 1: Pre-Discovery Engagement Plans

### 2
**Map Donor Interests to Funding Priorities**

- Practice 2: Entry-level Gift Customization
- Practice 3: Giving Opportunity Interest Map

### 3
**Enhance Mid-Cycle Strategy Planning**

- Practice 4: Turnkey Cultivation Journey Toolkit
- Practice 5: Crowdsourced Strategy Library
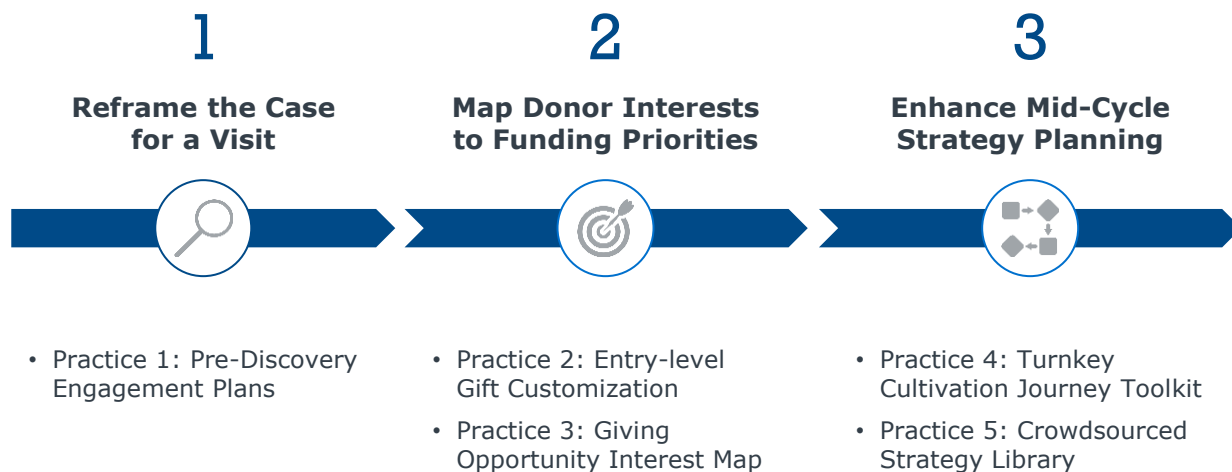
Source: Advancement Forum interviews and analysis.

# Practice 1: Pre-Discovery Engagement Plans

**Practice in Brief**

Rather than sending generic meeting requests that are likely to be ignored, unresponsive prospects are invited to unique, interest-driven engagement opportunities. When a prospect responds to outreach or attends the event, the engagement team informs major gift officers, who continue cultivation based on the topic area to which a prospect has responded.

**Problems Addressed**

Gift officers lack interesting ways to capture prospects' attention. Cold calls and generic emails do not effectively open doors to first-time visits. Gift officers spend too much time developing engagement opportunities for prospects.

**Diagnostic Questions**

1. Do gift officers see low response rates to initial outreach attempts?

    ____Yes          ____No

2. Do you have a significant number of prospects who have not responded to MGO outreach?

    ____Yes          ____No

3. Do gift officers struggle to identify engagement ideas to share with their prospects?

    ____Yes          ____No

*If you answered "Yes" more times than "No," you may wish to prioritize implementing Pre-Discovery Engagement Plans for your team.*

**Institution Profiled**

Furman University

Institutional control: Private
- Enrollment: 2,947 (2,768 undergraduate)
- Carnegie classification: Baccalaureate College
- Campus setting: Large Suburb (Greenville, SC)

# Challenges Across the Outreach Spectrum

## Getting in the Door with Prospects More Challenging Than Ever

One of the top challenges faced by major gift officers is getting prospective donors to respond to development outreach. When prospects ignore emails and phone calls, gift officers struggle to qualify enough prospects to reach their annual goals.

MGOs' first outreach step is often cold calling, but their calls often go unanswered. Individuals have myriad reasons to avoid phone calls, particularly from unknown numbers, and see no harm in sending fundraisers straight to their voicemail accounts.

### Picking Up the Phone Is an Endangered Activity

*Which of the following situations make you avoid an incoming phone call?*

1. I know the call will be time-consuming
2. The caller is whiny or needy
3. I am currently attending an event
4. **The caller wants a favor**
5. I want to avoid verbal confrontation
6. Someone will overhear me
7. I am busy with work responsibilities

### Yet Email Goes Unopened

**121**
Average number of **emails received per day** by office workers

**20%**
Average **open rate** for emails from nonprofits

### And Meetings Have Lost Their Luster

**25M**
**Meetings per day** in the United States

**67%**
Of meetings are **considered failures**

Gift officers also rely on emails, but they are easy for busy prospects to delete without reading. Even when prospects intend to respond, emails often get lost in their inboxes or are deprioritized in favor of work-related communications.

The goal of both outreach emails and cold calls is to schedule meetings, which is not a compelling reason for prospects to respond. Most meetings are considered failures for reasons including a lack of agenda, late arrivals, or content that could have been covered via email. In this context, adding another meeting to a prospect's calendar holds little appeal.

Source: "Ultimate Email Marketing Benchmarks for 2019: By Industry & Day," Campaign Monitor, 2019; "Why Millennials Hate Talking on the Phone," bankmycell, 2019; "The Shocking Truth about How Many Emails Are Sent," Campaign Monitor, 2019; "How Much Time Do We Spend In Meetings? (Hint: It's Scary) ," *The Muse*, 2019; Advancement Forum interviews and analysis.

# Struggling to Start the Conversation

## 'I'll Be in Town' Outreach Gives Prospects Few Reasons to Reply

Gift officers' communication often fails because it does not include content that compels prospects to respond. Emails often feature generic subject lines, broad details, and uninteresting next steps. Prospects who open these messages may be left with unanswered questions about why the meeting is important, how it is different from other institutionally-sponsored events, and what the agenda will be.

### An Email Destined for 'Deleted Items'

From: Jane.M.Gift@university.edu
To: John.Prospect19@company.com
Subject: Meet with EAB U in Houston

**Generic subject**

Dear John,

**Vague content**

Lots of great things are happening on campus this month, and I'd appreciate the chance to share some of them with you when I'm in Houston next month.

Please let me know what your availability looks like for the dates when I will be in town. I look forward to hearing from you soon.

**Uninteresting next steps**

All the best,

Jane M. Gift
Director of Development
EAB University

### Leaving Prospects with Unanswered Questions

*Will this meeting be worth my time?*

*Am I supposed to know who you are?*

*Is this different from the event I was invited to?*

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# Giving Prospects a Reason to Respond

## Furman Builds Outreach Strategy Around Prospect Interests

To move beyond generic emails, Furman University ensures that prospects receive compelling content as the first step in cultivation as part of a Pre-Discovery Engagement Plan. Engagement staff at Furman identify opportunities on campus and on the road that are unique and likely to match a prospect's interests, like a tailgate that is an exclusive networking event for former student athletes. To get these hard-to-reach prospects to respond, Furman's team uses multiple communications channels to send the message, like peer networking and scripting for student callers.

**Pre-Discovery Engagement Plans Catch Prospect Attention**

✔ Tailgate for former student athletes before rivalry game

✔ Student research presentation day on campus

✔ Orchestra concert followed by private Q&A session

**Four Key Elements**

**1** Based on **areas of interest**

**2** Variety of **locations and times**

**3** Planned by **teams across advancement**

**4** Connected to scalable **segmentation coding** in database

## Comprehensive Outreach Plan Drives Response Rates

Peer-to-peer networking calls

Personalized email invitations

Student caller follow-up reminders

This approach is deployed for prospects who have historically been unresponsive to traditional outreach. They are tagged in the database to receive content-focused engagement updates, and the engagement team hands off the relationship to an MGO if prospects respond. As a result, donors receive more interesting outreach but MGOs are not responsible for generating new content for everyone in their portfolios.

# Engineering Efficiency Into Discovery Outreach

## Furman's Engagement Plans Minimize Time Costs, Maximize Returns

For MGOs, the pre-discovery engagement plans provide critical intel on what topics will elicit a response from their prospects. In the first year of the program, Furman saw previously-unresponsive prospects open invitations, attend events, and make gifts. At the same time, MGOs no longer waste time guessing about what will interest a prospect, and they have more time to focus on executing a strong cultivation strategy.

### Accelerating Giving Conversations...

> "Once we get a foot in the door with these prospects, they will respond to MGOs' outreach. That first positive response helps us **jumpstart the conversation about giving opportunities**."

*Shon Herrick*
*Associate Vice President for Development*
*Furman University*

### Benefits for MGOs

- ☑ Clarifies **prospects' interests** upfront
- ☑ Reduces hunting for relevant **engagement events**
- ☑ Opens doors to connect with critical **campus partners**

### ...And Avoiding the Trash Folder

**49**
Unresponsive prospects have responded to an **invitation**

**36**
Unresponsive prospects have attended an **event**

**121**
Unresponsive prospects made a **gift** in FY18

Source: Advancement Forum interviews and analysis.

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# Practice 2: Entry-Level Gift Customization

**Practice in Brief**

Prospects are presented with giving opportunities that have pre-determined customization options, including the field for which an internship is designated or the region for which a scholarship is targeted. The limited customization options prevent the gift from being impossible-to-implement while satisfying the prospect's desire to design their own gift destination.

**Problems Addressed**

Donors want to support highly-specific gift designations. However, fundraising priorities are designed to be as broad as possible, which leads to giving options that are not compelling to donors.

**Diagnostic Questions**

1. Do gift officers struggle to match institutional priorities to donor interests?

    ___Yes          ___No

2. Is it common for gift officers to suggest one-off, unsustainable gift destinations?

    ___Yes          ___No

3. Do gift officers lack compelling entry-level major gift fundraising products?

    ___Yes          ___No

*If you answered "Yes" more times than "No," you may wish to prioritize implementing Entry-Level Gift Customization for your team.*

**Institution Profiled**

Sewanee, The University of the South

- Institutional control: Private
- Enrollment: 1,785 (1,698 undergraduate)
- Carnegie classification: Baccalaureate College
- Campus setting: Distant Rural (Sewanee, TN)

# Struggling to Find a Perfect-Fit Gift Destination

## Prospects Don't See Their Passions in the Priorities We Pitch

Gift officers increasingly struggle to match prospects' interests with the opportunities for support on campus. Major gift donors increasingly want to support individualized, customized gift destinations. Yet institutions set fundraising priorities to appease stakeholders across campus, leading to broad buckets of giving opportunities that are a far cry from donors' interests.

Gift cultivation often slows down as MGOs attempt to identify priorities on campus that will excite a prospect, sometimes relying on customized proposals that may be impossible to sustain over time because they are too prescriptive or request too much donor control over how funding is distributed.

**Philanthropic Interests Increasingly Diverse**



Students from my hometown

First-generation university students

Left-handed soccer players
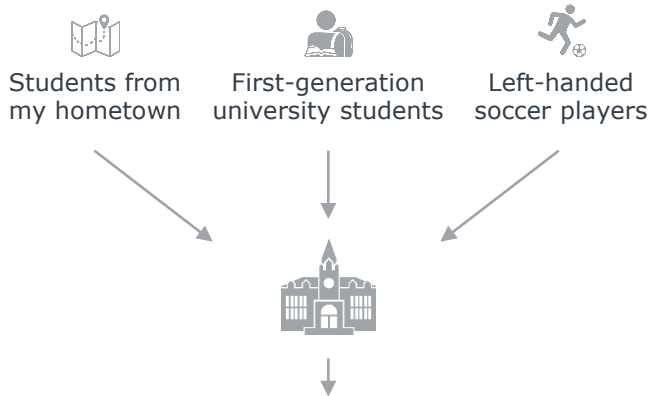
**Institutional Response**
Current use unrestricted scholarships

### MGOs Struggle to Connect the Dots

"We set our fundraising priorities to please everyone, which led to broad buckets that aren't interesting to donors.

Gift officers are having a hard time convincing our donors that **a broad giving destination will have the impact they are looking for**."

*Associate Vice President for Development Public Research University*

Source: Advancement Forum interviews and analysis.

# Offering Donors Bounded-Choice Customization

## Sewanee, The University of the South Scales Donor-Designated Gifts

To let donors maintain control over their gifts without veering too far from institutional priorities, institutions are clarifying donors' customization options upfront. Sewanee, the University of the South has designed Entry-Level Gift Customization to give first-time major gift donors the options they seek without making gifts impossible-to-implement or unsustainable over time. Donors can choose to fund a current-use internship or named scholarship, and they can specify the field for which an internship is designated or can specify broad parameters for scholarship recipients.

### Customized Gifts Designed with Clear Guardrails for Staff

**Donor-Designed Giving Opportunities**

*Summer Internship*
- Minimum commitment: $3,000 per year
- Choice of field: business, public service, arts, or STEM

*Named Four-Year Scholarship*
- Minimum commitment: $10,000 per year
- Student's home region
- Academic interests

Identified institutional priority

Pre-defined categories guide donor preferences

Customization options increase with giving level

Broad categories increase institutional flexibility

MGOs are given clear guidelines regarding what options are (and are not) open for discussion. If a donor wants to restrict a scholarship more that the rules allow, gift officers can guide the conversation to a compromise for the scholarship to be quickly approved and implemented.

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# A Positive Response to Customization at Scale

## Sewanee's MGOs Leverage Gift Options to Engage Overlooked Prospects

Entry-Level Gift Customization has proven to be a useful tool for both donors and frontline fundraisers. Donors are excited by the opportunity to play a role in deciding what their gifts should support and by having access to the major gift stewardship experience. At the same time, major gift officers have focused on wider swaths of their portfolios, because they have compelling fundraising products for prospects who are not ready to make a six-figure commitment. As a result, MGOs are paying more attention to early major gift prospects to grow the major gift pipeline.

### Increased Giving for Institutional Priorities

**$1.3M+**  Raised for entry-level customized gifts since program launch

### A Critical Tool to Bring Prospects into Major Gifts

" Too often, gift officers **only pay attention to the prospects who can make six-figure gifts**. They're not working on developing a future pipeline or engaging everyone in their portfolio.

By creating impactful annual giving vehicles, gift officers have **a lively toolbox to engage the mid-major donor**, guiding them to make a multi-year commitment, thereby growing your major giving pipeline of the future."

*Robert Black*
*Associate Vice President for Advancement*
*Sewanee, The University of the South*

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# Practice 3: Giving Opportunity Interest Map

**Practice in Brief**

Advancement staff graphically connect existing giving opportunities across campus to a range of potential donor interests. Gift officers are trained to use the map as a tool to link prospect passions to relevant gift destinations during cultivation conversations.

**Problems Addressed**

Major gift officers struggle to keep track of the numerous philanthropic priorities across an institution. They lose time matching existing giving opportunities to donors' interests.

**Diagnostic Questions**

1.  Do MGOs often lose track of current giving opportunities and fundraising priorities?

    ____Yes          ____No

2.  Do gift officers have trouble identifying existing giving opportunities based on prospect interests during in-person meetings?

    ____Yes          ____No

3.  Does your team need a clear system to comprehensively communicate giving priorities to gift officers and other staff members?

    ____Yes          ____No

*If you answered "Yes" more times than "No," you may wish to develop a Giving Opportunity Interest Map at your institution.*

**Institution Profiled**

University of Denver

• Institutional control: Private
• Enrollment: 11,952 (5,801 undergraduate)
• Carnegie classification: Doctoral University
• Campus setting: Large City (Denver, CO)

# A Field Guide to Donor Interests

## University of Denver Helps MGOs Connect Passion to Priority

MGOs often struggle to quickly connect donors to relevant campus priorities because it is challenging to keep track of every giving opportunity that could be of interest. To address this challenge, the University of Denver created a Giving Opportunity Interest Map that helps MGOs pinpoint existing priorities that align with prospects' interests instead of asking them to wade through information published separately by every campus division.

**Interest Map Helps MGOs Connect Unique Interests to Campus Needs**

*General Interest*

Increasing access to higher education

*Preference 1*

What type of financial aid does the donor prefer to support?

Merit-based

Need-based

*Preference 2*

What aspect of increasing access is most important to the donor?

First generation student success

Empowering women

*Best Fit Giving Destination*

**Women's Leadership Scholars**
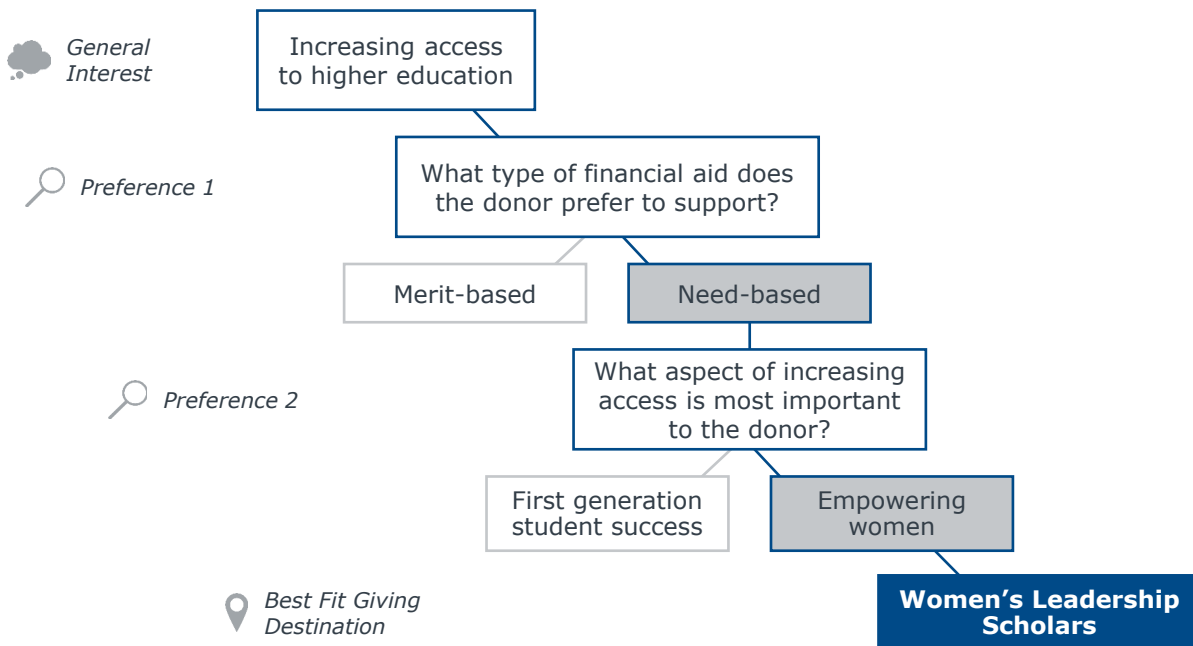
The first Giving Opportunity Interest Map featured every scholarship-related fundraising priority. Advancement staff listed all the scholarship giving opportunities on campus and organized them into thematic categories. Next, they brainstormed what personal interests would motivate a donor to give to each scholarship and indicated each interest on a graphic map for easy reference by MGOs.

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# Making It Easy to Align Interests

## Giving Opportunity Interest Map Focuses Fundraising on Institutional Needs

Comprehensive MGO training will ensure that frontline fundraisers know how to talk to donors about the giving opportunities outlined on the Giving Opportunity Interest Map. With the maps in hand, gift officers have been able to increase the appeal of current funding priorities instead of relying on customized gifts for every donor.

Moving forward, additional maps will be made for giving priorities beyond scholarships, including research centers and deans' strategic initiatives, with the goal of articulating every fundraising priority in terms of what donors it will appeal to.

### MGOs Gain a Critical Tool for Scholarship Funding Conversations

MGOs spend less time **hunting for priorities** relevant to the donor

Ensures all gifts are **feasible to implement** and steward

Increases appeal of **traditional funding destinations**

### Meeting Donor Expectations and Institutional Needs

"If scholarships are going to be 50% of our campaign goal, we have to make them relevant to a range of donor interests. These tools help our gift officers hold **conversations based on why donors want to support us** without losing sight of our institutional priorities."

*Roger Smith*
*Executive Director of Development*
*University of Denver*

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# Giving Opportunity Interest Map Template Instructions

Use the template on the following page (or download an interactive version at eab.com) and the implementation steps outlined below to create a Giving Opportunity Interest Map for major gift officers. Maps should help fundraisers gain an overview of fundraising priorities and the prospects most likely to support them.

A sample Giving Opportunity Interest Map from the University of Denver is also provided for your consideration. Use it as the basis for your own Interest Map or create a new layout that matches your team's goals.

---

**Implementation Steps for Giving Opportunity Interest Maps**

1. List fundraising priorities within a given campaign priority category or institutional division.
   - Examples include scholarship funds, a dean's strategic priorities, or all giving destinations related to a specific topic area.
   - Group priorities based on common themes for easy reference by gift officers.

2. Brainstorm hypothetical profiles of the donors who most often support the listed priorities.
   - Additional causes they support;
   - Motivation for giving;
   - Interests on campus.

3. Use the template to create a graphic that shows which donor interest areas relate to the fundraising priorities.
   - One interest could be represented by multiple fundraising priorities.
   - The list is not static and can be modified as needed.

4. Share map with frontline fundraisers and explain its use in advancing gift conversations.

---

To create your own Giving Opportunity Interest Map, download the **editable PowerPoint template available at eab.com.**

# Giving Opportunity Interest Map Template

| Priority Bucket | Fundraising Priorities | Donor Interest 1 | Donor Interest 2 | Donor Interest 3 | Donor Interest 4 | Donor Interest 5 | Donor Interest 6 |
|---|---|---|---|---|---|---|---|
| *Ex: immediate-use scholarships* | *First Generation Scholars* | | ✓ | | | ✓ | |
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# Sample Giving Opportunity Interest Map

## University of Denver Giving Opportunity Interest Map

| PILLARS | MATRIX | HIGH NEED | MERIT | DONOR PREFERENCES (FIRST-GEN/WOMEN/RACE) | LOCAL | NON-LOCAL | GLOBAL | PUBLIC GOOD | GRADUATE | SPECIALIZED INTEREST | SCHOLAR ATHLETES | AREA OF HIGHEST NEED ("TRUST DU") |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Access and Opportunity | DENVER PROMISE | ⬡ | | ⬡ | ⬡ | | | | | | | |
| | FIRST-GENERATION (1STGENU, ELI) | ⬡ | | ⬡ | ⬡ | ⬡ | | | | | | |
| | VIP | ⬡ | | ⬡ | ⬡ | | | | | | | |
| | PATHWAYS | ⬡ | | ⬡ | | ⬡ | | | | | | |
| | CWC WOMEN'S LEADERSHIP SCHOLARS | | | ⬡ | | ⬡ | | | | | | |
| Passion and Impact | STEM | ⬡ | | ⬡ | | | | | ⬡ | | | |
| | GLOBAL SCHOLARS | ⬡ | | | | | ⬡ | | | | | |
| | ATHLETICS | ⬡ | | | | | | | | | ⬡ | |
| | IMPACTDU | | | ⬡ | | | | | | ⬡ | | |
| Academic Distinction | PUBLIC GOOD SCHOLARS | ⬡ | | | ⬡ | ⬡ | | ⬡ | | | | |
| | DU SCHOLARSHIP FUND | | | | | | | | | | | ⬡ |
| | RESEARCH; FELLOWSHIPS; ASSISTANTSHIPS; SCHOLARSHIPS | ⬡ | ⬡ | ⬡ | | | | | ⬡ | | | |
| | CHANCELLOR'S LEADERSHIP AWARD | | ⬡ | | | | | | | | | |

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# Practice 4: Turnkey Cultivation Journey Toolkit

**Practice in Brief**

A comprehensive resource guide provides major gift officers with tools, collateral, and guidelines for each phase of donor cultivation.

**Problems Addressed**

Gift officers often lose momentum after initial visits because they lack tangible next steps, ways to move the conversation forward, or clear reasons to meet. They spend too much time trying to identify supporting resources and next steps, ultimately delaying the solicitation date.

**Diagnostic Questions**

1. Do frontline fundraisers struggle to quickly develop comprehensive cultivation plans for their prospects?

    ____Yes          ____No

2. Do gift officers lose time hunting for collateral or creating it from scratch because they do not know what is available?

    ____Yes          ____No

3. Do solicitation dates often get pushed back due to poor cultivation planning?

    ____Yes          ____No

*If you answered "Yes" more times than "No," you may wish to create a Turnkey Cultivation Journey Toolkit at your institution.*

**Institution Profiled**

Clemson University

• Institutional control: Public
• Enrollment: 24,951 (19,669 undergraduate)
• Carnegie classification: Doctoral University
• Campus setting: Large Suburb (Clemson, SC)

# Losing Momentum After Discovery

## Cultivation Strategies Stagnate En Route to Solicitation

To make gains in fundraiser efficiency, gift officers need to move prospects from qualification to solicitation as quickly as possible, yet MGOs often struggle to maintain momentum over time. Most donor cultivation cycles start with a promising launch. Introductory visits are attached to strong talking points and clear next steps. However, MGOs' cultivation plans often stall after the early stages. Often, cultivation enters a "murky middle" period where MGOs lack clear reasons to meet, interesting collateral to build excitement, or tangible next steps. As a result, planned solicitation dates are pushed farther into the future or postponed indefinitely.

### Strategy Starts Strong, but Lacks Detail After Preliminary Visits

*Jane Q. Smith's Donor Journey*

**A Promising Launch**
*Visits 1 and 2*

- Clear visit **plan and goals**
- Thoughtful questions and **talking points**
- Logical **next steps**

**An Ever-Delayed Proposal**
*Visits 7-9+*

- **Moved back** on a regular basis
- **No urgency** for gift officer or donor

**The Murky Middle**
*Visits 3-6*

- No obvious **reason to meet**
- Visits used to build rapport, **not move strategy forward**

# A Ready-to-Use Prospect Strategy

## Clemson Develops Tools to Remove Questions from Planning Process

To avoid stalling during cultivation, gift officers need a strong toolkit with ready-to-use resources that will move prospect strategy forward. To achieve this goal, Clemson University created a Turnkey Cultivation Journey Toolkit that guides MGOs from qualification to gift with clear to-do items at every stage. The toolkit provides a plug-and-plan strategy for every prospect and removes MGO decision-making from cultivation planning so that they can focus on customizing the templated steps for each prospect.

**Stage-Specific Resources Get MGOs Up and Running Quickly**

### Donor Cultivation Calendar

- ❑ Phase 1: Qualification
- ❑ **Phase 2:** Discovery
- ❑ **Phase 3:** Cultivation
- ❑ Phase 4: Pre-Solicitation
- ❑ Phase 5: Solicitation
- ❑ Phase 6: Solicitation Follow-Up
- ❑ Phase 7: Stewardship

### Available Plug-and-Play Resources

- Critical questions to **guide the conversation**
- **Agenda-setting questions** to guide strategy
- **Pivotal moments** to move strategy forward
- Updated **collateral** and templates
- Troubleshooting for **tough scenarios**
- Actionable **next steps**

The current toolkit focuses on resources needed to raise money for endowed scholarships. After testing and refining the format over time, toolkits will be developed to help MGOs plan cultivation for endowed professorships and other institutional priorities.

Source: Advancement Forum interviews and analysis.

# The Right Resources at the Right Time

## Clemson's Just-in-Time Tools Take Uncertainty Out of Strategy Prep

For any given category of gift opportunities, Clemson's toolkits will assemble 50+ resources to reinvigorate the 8-12 donor engagements between identification and solicitation. For example, each phase of cultivation will include a list of available collateral, talking points, and questions to answer before and after a prospect interaction so that gift officers save time when debriefing and planning next steps. Each toolkit will include both unit-specific and institution-wide content so MGOs have as many options as possible for each prospect in their portfolio.

**Sample Toolkit Components for Cultivation**

### Agenda-Setting Questions

- Is my plan right for the donor?
- Is my ask at the right level?
- Is now the right time for an ask?
- Do I know what my next steps will be?

### Action Steps

- Meet with a scholarship recipient
- Visit financial aid office
- Attend donor appreciation event
- Attend day of gratitude

### Tough Scenarios

- Financial condition impacts ability to give
- Donor writes a check for a different amount than discussed
- Academic leader shares priorities but doesn't mention scholarships

Source: Advancement Forum interviews and analysis.

# Creating Your Turnkey Cultivation Journey Toolkit

## Online Template to Facilitate Implementation on Campus

The Advancement Forum has developed an interactive template to facilitate the creation and implementation of a Turnkey Donor Cultivation Journey. Download the instructions and template online to quickly build a set of user-friendly resource guides for frontline fundraisers.

### Template to Build a Customized Cultivation Toolkit



**EAB**

Advancement Forum

**Navigating the Template**

| Phase | Goal |
| --- | --- |
| Phase 1: Qualification | Identify the donor's capacity, inclination, and affinity to give. In this pahse, the MGO ensures the information in the database is up-to-date. |
| Phase 2: Discovery | Pinpoint the key components of the cultivation plan: what size gift to ask for, who will be involved, and how to align donor interests with potential giving opportunities. During this phase, the MGO will identify milestones and form a written plan outlining the major steps in the process. |
| Phase 3: Cultivation | Build the relationship and gain trust by engaging with the donor. At the end of this phase the MGO, will be in a position to deliver a proposal and will assemble the team they selected during discovery to help them. |
| Phase 4: Pre-Solicitation | Narrow and prepare the ask – amount, timing, and the resources needed. During this phase, the MGO identifies and discusses stewardship and recognition opportunities with the donor, ensures key stakeholders are prepped for next steps, and prepares for possible objections from the donor. |
| Phase 5: Solicitation | Make the ask, receive an answer, and identify the appropriate payment schedule (assumptions about this should have been addressed during pre-solicitation). |
| Phase 6: Solicitation Follow-Up | Create a plan for to secure the gift from the donor (the timeline and method of payment). After creating a plan, the MGO will follow the steps outlined in the plan to obtain the gift from the donor. |
| Phase 7: Stewardship | Stay in touch with the donor to show appreciation, communicate impact, and cultivate further gifts. The MGO will create a long term stewardship plan to ensure the connection with the donor remains positive and strong. |

**Overview of Each Phase:**

Each tab of this spreadsheet represents a different phase of the cultivation process.

To the right there is a table of contents with a link and a description of the goals of each phase. Feel free to use the links or simply click through the tabs below.

**Components of Each Phase:**

Within each phase, there are sections that you will fill out. These sections represent the components of each phase that an MGO should include in their strategy.

| ☑ Donor Information to Gather Prior to the Visit | ? Key Questions the MGO Should Ask the Donor | Key Questions the MGO Should Ask Themselves | ≡ Resources | Pivotal Moments That Indicate Readiness to Move on | Prepare For These Possible Tough Scenarios | Essential Communication Points |
| --- | --- | --- | --- | --- | --- | --- |
| Types of donor information an MGO should have on hand during the visit | Questions an MGO should ask the donor during this phase | Questions MGOs should ask themselves during or after this phase | List of resources the MGO should have prepared or on hand during this phase | Signals that the MGO should move onto the next phase | Common tough scenarios that arise during this phase – MGOs can use these examples to proactively prepare a response | During these times MGOs should be in communication with the donor |

Implementation template includes:

- Step-by-step instructions for staff contributing to toolkit
- Sample resource categories for each cultivation stage
- Plug-and-play template for final toolkit

Download the Turnkey Cultivation Journey template here.

# Practice 5: Crowdsourced Strategy Library

**Practice in Brief**

Advancement leaders identify and share strong cultivation strategies that MGOs should re-use for their prospects. Strategies are saved in the institution's CRM, so gift officers can copy and paste cultivation steps to speed up cultivation planning.

**Problems Addressed**

Major gift officers build donor journeys and engagement strategies from scratch for each prospect instead of using best practices that have worked for their colleagues. Time is spent brainstorming strategies instead of engaging with prospects and donors.

**Diagnostic Questions**

1.  Do gift officers spend too much time creating unique cultivation plans for every prospect?

    ____Yes          ____No

2.  Would gift officers benefit from sharing and re-using cultivation strategies that have worked in the past?

    ____Yes          ____No

3.  Does your CRM support saving and sharing cultivation steps without needing to use additional software tools?

    ____Yes          ____No

*If you answered "Yes" more times than "No," you may wish to create a Crowdsourced Strategy Library for your team.*

**Institution Profiled**

Villanova University

• Institutional control: Private
• Enrollment: 11,030 (6,917 undergraduate)
• Carnegie classification: Doctoral University
• Campus setting: Large Suburb (Villanova, PA)

# The End of Strategy from Scratch

## Villanova Systematically Scales Successful Cultivation Plans

Gift officers lose time creating cultivation strategies from scratch instead of re-using what has worked over time. To encourage MGO strategy sharing, Villanova University is creating a CRM-based Crowdsourced Strategy Library that will allow gift officers to copy and paste cultivation steps into their prospects' records. Development leaders will take the lead in identifying which strategies are strong enough to be included in the library, and MGOs will be able to choose the best-fit strategy for their prospects and adapt it to their interests.

**One Successful Strategy...**

| Title | Date | Description | Step Type |
|---|---|---|---|
| Dinner with Dean | Oct. 2019 | If donor is in town, will appreciate the touch point | Leadership Dinner |
| Building Update | Mar. 2020 | Share progress on new pavilion | Impact Update |
| Student Center Report | May 2021 | Send stewardship report for five-year naming anniversary | Stewardship |

**...Applied to Multiple Donors**

1. Identify strong strategies with **positive results**

2. Assemble plans in **strategy development guide**

3. **Reuse and adapt** plans to individual donors

### Replicating Success Across the Team

"One of the biggest challenges for MGOs is looking years ahead and finding solutions when a gift is stuck. Through our new process we now have a record of successful strategies. Positive outcomes can be put in the strategy guide and **serve as a resource for other MGOs**."

*Kevin Noller*
*Assistant Vice President of Major Gifts*
*Villanova University*

The strategy library has allowed MGOs at Villanova to spend more time acting on strategy and engaging donors instead of brainstorming new cultivation steps at their desks. Tenured gift officers have appreciated the opportunity to gain new ideas from their colleagues, and MGO onboarding will cover the library's benefits to get new MGOs up to speed more quickly.

Source: Advancement Forum interviews and analysis.

# Setting Strategy with Your Team

## Develop Donor Strategy at Scale

To help gift officers develop and implement strategy more efficiently, consider the next steps and discussion questions below. These resources will enable your team to determine current strengths and areas for improvement. After doing so, use the prioritization guide on the following page to identify which practices to implement.

### Next Steps for Implementation

**Short-Term**

▶ Encourage MGOs to share and re-use strong cultivation strategies

▶ Edit outreach scripting to increase appeal for unresponsive prospects

▶ Organize current fundraising collateral to maximize utilization

**Long-Term**

▶ Design Giving Opportunity Interest Map for current fundraising priorities

▶ Create Turnkey Donor Journey for key fundraising priorities

### Discussion Questions

1 | Is our discovery outreach compelling to prospects? How can we increase response rates?

2 | Are MGOs knowledgeable about giving opportunities on campus? How can we keep staff updated as priorities change?

3 | How can we improve the process of matching donor interests to giving opportunities on campus?

4 | How much time do MGOs spend creating cultivation plans? What resources would make the process faster?

5 | For critical priorities, have we mapped available collateral to each step in the cultivation process?

Source: Advancement Forum interviews and analysis.

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# Prioritization Guide

## Speeding Implementation and Ensuring Follow-Through

**Instructions:**

Based on your institution's goals and available resources, use the chart below to map out which of the practices profiled in this section you would like to prioritize. Use this document to assess viability and determine next steps.

| Tactic | My Institution Should Prioritize This Tactic | Notes and Next Steps |
|---|---|---|
| **Pre-Discovery Engagement Plans**<br><br>*Furman University*<br><br>Content-first outreach kickstarts engagement with previously unresponsive prospects. | 1   2   3   4   5<br>*Disagree*          *Agree* | |
| **Entry-Level Gift Customization**<br><br>*Sewanee, The University of the South*<br><br>Pre-determined guardrails set clear limits on how prospects can customize a gift. | 1   2   3   4   5 | |
| **Giving Opportunity Interest Map**<br><br>*University of Denver*<br><br>Donor interest profiles are linked to campus fundraising priorities. | 1   2   3   4   5 | |
| **Turnkey Cultivation Journey Toolkit**<br><br>*Clemson University*<br><br>Plug-and-play resources for each phase of the donor lifecycle. | 1   2   3   4   5 | |
| **Crowdsourced Strategy Library**<br><br>*Villanova University*<br><br>Successful cultivation strategies are saved in a repository for MGOs to replicate and adapt. | 1   2   3   4   5 | |

# Enhance Intermediate Goal Accountability

3

# 'Am I a Fundraiser or a Project Manager?'

## Portfolio Coverage Requires Complex Project Management Skillset

Gift officers often struggle to cover their entire portfolios because they are not accustomed to high-volume project management. Today's major gift landscape is more complex than ever, as escalating donor demand for customized interactions requires MGOs to think about every prospect as a unique campaign into itself. Planning and carrying out these pursuits requires strong project management skills, but gift officer recruitment often prioritizes donor-facing skills, like experience making the ask, communicating with stakeholders, and staying cool under pressure. As a result, MGOs face a skill mismatch between the skills they bring to the role and the expectations thrust upon them.

> ### Keeping 50 Projects on Track
>
> "Each major gift officer is effectively doing project management. Thus a portfolio of 50 means managing 50 unique, complex projects and **keeping them all moving forward simultaneously**."
>
> *David Lively*
> *Managing Major Gift Fundraisers: A Contrarian's Guide*

### MGO Hiring Focuses on Donor-Facing Skills

**Now Hiring: Major Gift Officer**
*Preference Given to Candidates with:*

- ☑ Experience making the ask for gifts from $25K to $100K
- ☑ Excellent interpersonal, written, and oral communications
- ☑ Ability to maintain a positive and professional attitude under pressure
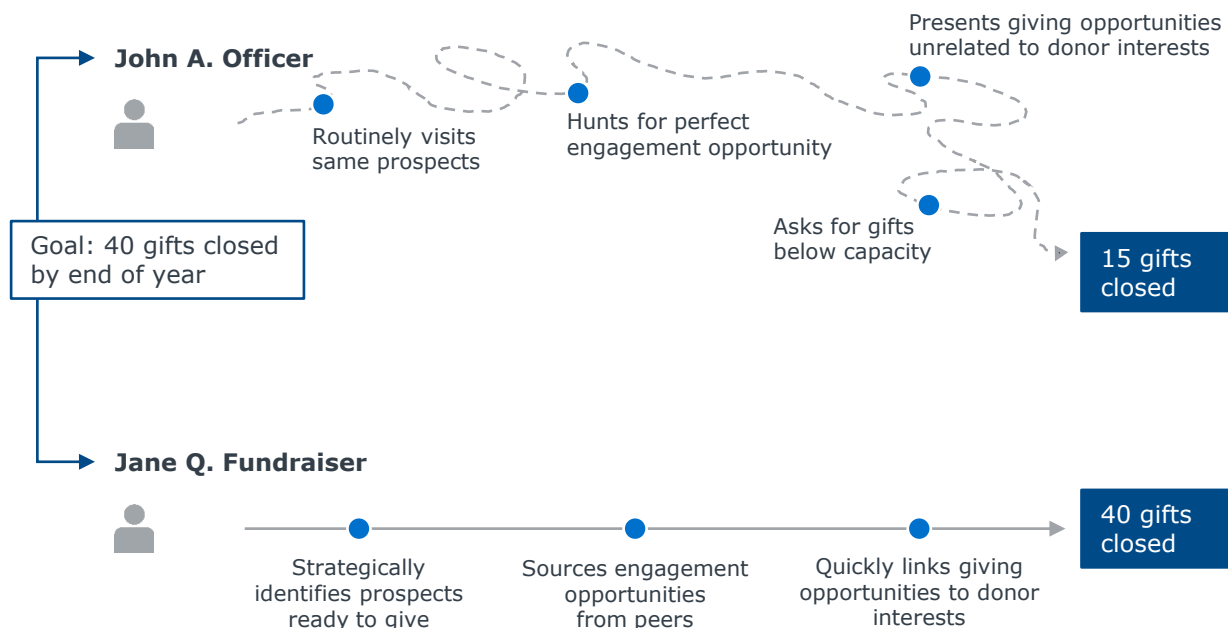
**Missing from the List:**

- ✖ Balancing multiple ongoing processes
- ✖ Shifting strategy based on donor response
- ✖ Prioritizing between competing demands

Source: David Lively, "*Managing Major Gift Fundraisers: A Contrarian's Guide*," Council for Advancement and Support of Education, 2017; Advancement Forum interviews and analysis.

# Not a Straight Line from Strategy to Results

## End-Goal Metrics Say Little About How to Meet Them

Despite acknowledging MGOs' project management responsibilities, few advancement shops tangibly help gift officers efficiently manage their portfolios from day to day. Many development teams have implemented quantitative performance metrics as an attempt to direct MGO time management. Common metrics like visits, asks, and dollars raised do not provide MGOs with indications of what steps to follow in order to reach them as efficiently as possible. As such, gift officers often follow a trial-and-error path to their goals with many dead ends and false starts along the way. To move forward, gift officers need tools and support to focus on the right activities at the right time for every prospect.

**John A. Officer**

Routinely visits same prospects

Hunts for perfect engagement opportunity

Presents giving opportunities unrelated to donor interests

Asks for gifts below capacity

Goal: 40 gifts closed by end of year

15 gifts closed

**Jane Q. Fundraiser**

Strategically identifies prospects ready to give

Sources engagement opportunities from peers

Quickly links giving opportunities to donor interests

40 gifts closed

Source: Advancement Forum interviews and analysis.

# Managers Ill-Equipped to Provide Guidance

## The Best Player Often Becomes the Coach, Regardless of Readiness

Beyond metrics, managers are responsible for keeping major gift officers on track to reach their goals, but they often lack role-specific training in coaching and management skills. Many managers are former fundraisers who excelled at bringing in gifts but may be unprepared to coach other staff.

As a result, staff often feel that their managers are ineffective. A recent survey of sales organizations showed that most managers thought they were skilled coaches, while their staff saw their coaching much less positively. If asked the same question, fundraisers are likely to have the same less-than-positive views of their direct managers' coaching abilities.

### Managers Offered Few Opportunities to Strengthen Their Skills...

## 57%

Of fundraising directors had no training before assuming their first management job

> One of the primary leadership challenges in advancement is that we often promote high-performing fundraisers into management positions, **without providing them appropriate training and coaching** to develop the essential management skills they often lack."
>
> *David Unruh*
> *Senior Vice President*
> *for Institutional Advancement*
> *Drexel University*

### ...And Are Perceived as Ineffective by Their Staff

*Survey of Perceived Coaching Ability, Percentile Ranking*

100

**79th Percentile**

Where sales leaders rank themselves

**38th Percentile**

Where salespeople rank their leaders

0

# A Threat to Success Across the Team

## Short-Term Management Challenges Limit Long-Term Performance

A lack of role-specific training leads managers to make small mistakes that threaten overall fundraising performance. In many cases, check-in time is not used effectively, and feedback often focuses on past activity instead of how MGOs can improve to reach future goals. If these patterns continue, gift officers will struggle to reach their goals and may become increasingly frustrated, leading to long-term questions about engagement and retention.

| **Common Manager Missteps** | **Implications for Direct Reports** |
|---|---|
| **Ineffective Check-Ins**<br>Line-by-line reviews spend equal time on all prospects in portfolio | **Wasted Time**<br>Conversations provide little return on time invested |
| **Reactive Feedback**<br>Coaching focuses on past performance, not future goals | **Falling Short of Goals**<br>Time used for strategy troubleshooting and action planning |
| **One-Size-Fits-All Approach**<br>Standardized goals ignore individuals' strengths and interests | **Turnover Risk**<br>Frustrated gift officers seek opportunities elsewhere |

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# Enhance Intermediate Goal Accountability

## Three Components for Increased Manager Effectiveness

To help MGOs manage their workflow to effectively reach annual goals, advancement managers should serve as trusted partners who help fundraisers stay on track through goal setting conversations, timely interventions, and targeted troubleshooting based on skill gaps or strategy missteps.

**1**

**Collaborative
Goal Setting**

Practice 6: Comparison
Metrics Calibration

**2**

**Just-in-Time
Course Correction**

Practice 7: Portfolio
Activity Dashboard

**3**

**Performance Root
Cause Analysis**

Practice 8: Root Cause KPIs
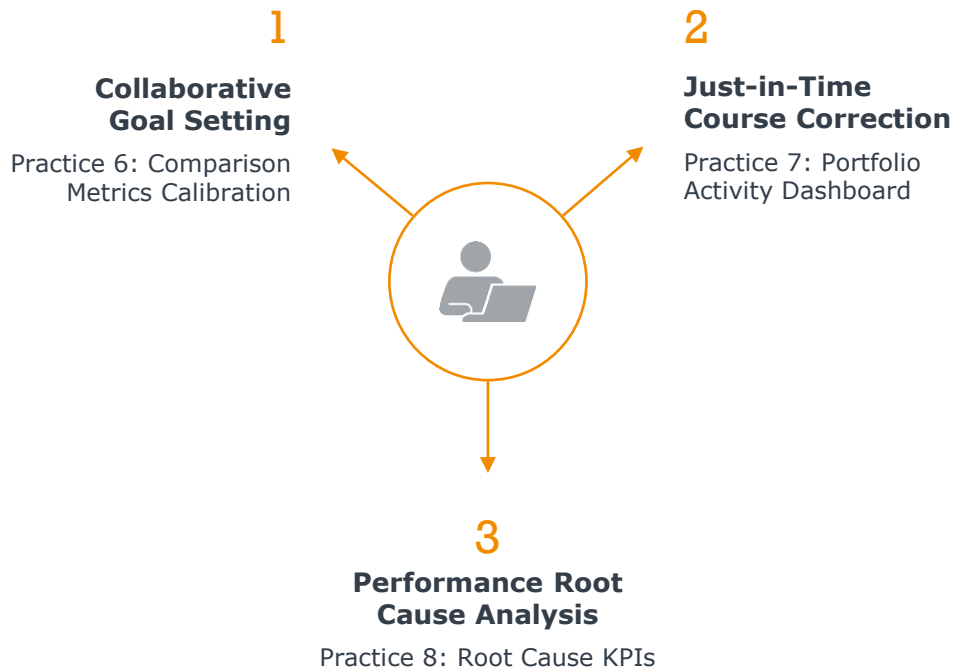
Source: Advancement Forum interviews and analysis.

# Practice 6: Collaborative Weighted Metrics

## Practice in Brief

Managers and frontline fundraisers work together to set annual goals. All gift officers are evaluated on the same metrics categories but work with their managers to individually weight each metric based on unit priorities and individual goals. Managers can see a normalized score for each MGO which allows them to evaluate how their teams are performing compared to the rest of the division.

## Problems Addressed

Gift officer metrics are often one-size-fits all. Gift officers lack insight into how metrics are designed and set. Performance comparisons do not account for differences in MGO tenure and unit fundraising potential.

## Diagnostic Questions

1. Do managers currently use the same annual goals for all their direct reports?

      ___Yes            ___No

2. Is it difficult to objectively compare gift officer performance across units?

      ___Yes            ___No

3. Do managers struggle to gain MGO buy-in for performance metrics?

      ___Yes            ___No

*If you answered "Yes" more times than "No," you may wish to implement Collaborative Weighted Metrics for your frontline fundraising teams.*

## Institution Profiled

University of Wisconsin-Madison

- Institutional control: Public
- Enrollment: 43,463 (31,705 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Large City (Madison, WI)

# A Collaborative Goal-Setting Process

## UW-Madison's Metrics Account for Fundraiser Context and Experience

The first step to increasing manager effectiveness is instilling responsibility for collaboratively setting goals with staff. To ensure that managers design goals to support their staff members' tenure and unit context, the University of Wisconsin-Madison implemented Collaborative Weighted Metrics.

All fundraisers are assessed based on the same metrics categories, but each metric's weight is determined through annual conversations between managers and MGOs. For example, if one unit's fundraisers recently finished a new building campaign, their metrics for the following year may prioritize qualifying new donors, with solicitation weighted lower.

**Performance Dashboards Display MGO-Specific Goal Weights**

**Employee:** John S. Smith

| Criteria | Rank | Goal | Actual |
|---|---|---|---|
| Contacts | 3 | 250 | 260 |
| Visits | 6 | 65 | 40 |
| Solicitations | 2 | 20 | 30 |
| Dollars | 4 | $4.5M | $1M |
| Qualifications | 5 | 20 | 10 |
| Commitments | 1 | 12 | 12 |
| | | **Weighted Score** | 97 |

**Employee:** Jane B. Doe

| Criteria | Rank | Goal | Actual |
|---|---|---|---|
| Contacts | 6 | 250 | 260 |
| Visits | 2 | 65 | 80 |
| Solicitations | 4 | 20 | 10 |
| Dollars | 1 | $4.5M | $7M |
| Qualifications | 3 | 20 | 17 |
| Commitments | 5 | 12 | 20 |
| | | **Weighted Score** | 123 |

Managers and MGOs negotiate **individually ranked importance** of metrics

| | |
|---|---|
| **Department Average** | 100 |
| **Peer Role Average** | 125 |

MGOs see how their scores **compares to peers** with the same title

Collaborative Weighted Metrics has increased fundraiser buy-in for performance metrics, because staff understand why and how individual metrics are determined. For managers, the CRM generates an overall score for every fundraiser, enabling apples-to-apples performance comparisons between direct reports, even if they have metrics that are weighted differently.

Source: Advancement Forum interviews and analysis.

# Practice 7: Portfolio Activity Dashboard

## Practice in Brief

Managers have access to an at-a-glace view of each gift officer's portfolio. Color-coded indicators show when a prospect hasn't had a recent visit, has an out-of-date activity plan, or is not on track toward a predicted ask date. Reports are updated nightly, so managers stay up to date on gift officers' performance outside of scheduled check-ins.

## Problems Addressed

Managers are often unable to provide just-in-time course corrections for their staff. Manager feedback typically focuses on what happened in the past instead of how to reach future goals.

## Diagnostic Questions

1. Do managers need additional tools to have targeted conversations with gift officers about their performance?

   ___Yes          ___No

2. Are manager-fundraiser check-ins primarily reserved for reviewing past performance, instead of intervening on current challenges?

   ___Yes          ___No

3. Would gift officers benefit from more targeted coaching sessions with their managers?

   ___Yes          ___No

*If you answered "Yes" more times than "No," you may wish to develop Portfolio Activity Dashboards for the managers of your fundraising teams.*

## Institution Profiled

University of Cincinnati

- Institutional control: Public
- Enrollment: 37,886 (26,762 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Large City (Cincinnati, OH)

# A Clear Window into Fundraiser Productivity

## University of Cincinnati Gives Managers Granular Insight into Portfolios

To focus on where fundraisers need to improve, managers need access to updated, easy-to-understand data. The University of Cincinnati addressed this challenge by designing a portfolio activity dashboard that gives managers an at-a-glance view of a gift officer's portfolio. Color-coded indicators show when a prospect hasn't had a recent visit, has an out-of-date activity plan, or is not on track toward a predicted ask date. MGOs are expected to have 80% of their portfolio defined as "active," which means that three out of four activity indicators are green on the dashboard.

### Sample Portfolio Activity Dashboard

| Prospect Management Status | City, State | PM Start Date | Visit | Strategic Move | Active Plan | Ask on Track | Total Points | Activity |
|---|---|---|---|---|---|---|---|---|
| Qualified | Harrison, OH | 6/2/17 | 🔴 | 🔴 | 🟢 | 🟢 | 2 | Not Active |
| Qualified | Milford, OH | 8/25/18 | 🟢 | 🔴 | 🟢 | 🟢 | 3 | Active |
| Qualified | Bear, DE | 10/10/17 | ⚫ | 🔴 | 🔴 | 🔴 | 0 | Not Active |
| Qualified | York, PA | 1/4/19 | ⚪ | ⚪ | ⚪ | ⚪ | 1 | Active |
| Qualified | Erlanger, KY | 7/5/16 | 🟢 | 🟢 | 🟢 | 🟢 | 4 | Active |

🟢 Yes  🔴 No  ⚫ Not Applicable  ⚪ PM Data Range Too Short

Activity indicators for MGO efforts

Summary of activity level

Reports are updated nightly, so managers can see always see the most recent data about gift officers' work without waiting for updates during scheduled check-ins. Managers are now expected to proactively intervene and brainstorm solutions when gift officers' data shows they may be getting off track.

# On-Demand Data for Just-in-Time Support

## University of Cincinnati Dashboard Directs Portfolio Conversations

Since the launch of the Prospect Activity Dashboard, managers have appreciated the ability to quickly see how their direct reports are doing. Managers can now have targeted conversations based on the data instead of relying on gift officers to self-report the challenges in their workflow. To ensure that these conversations take place, managers are expected to regularly consult the dashboard and proactively intervene when an indicator moves in a negative direction, like when as ask is postponed or a prospect plan is no longer active.

**A Deep Dive into Prospect Strategy…**

"Managers can now look at the prospects identified as non-active. They ask MGOs if the strategy is working. If it's not, the question then becomes why. We can have **better conversations about performance** as a result."

*Becky Fullmer*
*Assistant Vice President and Campaign Director*
*University of Cincinnati*

**…Including Critical Activity Indicators**

**Strategic Moves**
One strategic move per prospect at least every 6 months

**Ask Scheduled**
On track to make an ask within 3 years

**Red Flags Show Where to Spend Check-In Time**

"Let's use our time today to talk about how to **get this ask back on track**."

"The donor recently had a family emergency. How do you suggest that I **keep the conversation moving** forward?"

"Let's talk about how to **update your strategy** and plan a new ask date."

Source: Advancement Forum interviews and analysis.

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# Practice 8: Root Cause KPIs

**Practice in Brief**

Managers have access to 18 key performance indicators to determine why gift officers aren't reaching their goals. This data is not part of gift officers' formal performance reviews but gives managers insight into what they need to coach for individual staff members.

**Problems Addressed**

Poor performance on major summary metrics, like visits or dollars raised, may indicate that a gift officer is underperforming, but does not provide insight into why. Managers do not see more specific red flags and therefore do not know what areas to prioritize for coaching.

**Diagnostic Questions**

1. Do managers need to increase the proactive coaching they provide to frontline fundraisers?

    ___Yes            ___No

2. Do fundraisers often misreport CRM data due to imprecise data definitions?

    ___Yes            ___No

3. Do managers typically address gift officer challenges in a reactive, rather than proactive, manner?

    ___Yes            ___No

*If you answered "Yes" more times than "No," you may wish to identify Root Cause KPIs for your frontline fundraising teams.*

**Institution Profiled**

Oregon State University

• Institutional control: Public
• Enrollment: 30,986 (25,699 undergraduate)
• Carnegie classification: Doctoral University
• Campus setting: Small City (Corvallis, OR)

# Getting to the Root Cause of Underperformance

## Oregon State Leverages Data to Remedy MGO Inefficiencies

To increase the value of performance conversations, managers need to know both where their staff are underperforming and why performance is suffering, so they can coach accordingly. Oregon State University uses 18 Root Cause Key Performance Indicators (KPIs) to allow managers to determine where staff are struggling and why.

All gift officers at Oregon State are evaluated based on four broad metrics categories: visits, gifts closed, proposals, and dollars raised. The KPIs are used in ongoing conversations with managers but do not affect overall performance ratings.

**Standard Metrics Mask Reasons Behind Performance**

| | FY18 Goal | Progress to Date |
|---|---|---|
| 1 Number of visits | 200 | 375 |
| 2 Number of major gifts closed | 60 | 12 |
| 3 Number of major gift proposals | 125 | 15 |
| 4 Total dollars raised | $3M | $1M |

**KPIs Provide Insight into MGO Challenges**

**?** *"With this many visits, why have so few gifts come in?"*

▶ **Number of Unique Prospects Visited**

MGO visits the same prospect repeatedly

↳ *Strategize about future visit goals*

▶ **Rating of Average Visited Prospect**

MGO often visits low-rated individuals

↳ *Refocus on true major gift prospects*

**18** KPIs support the four primary metrics

To calculate the KPIs, fundraisers are required to enter updated data in the CRM, and data analysts flag troubling patters or red flags for managers. For example, if a gift officer is overperforming on visits but not reaching their goals for dolars raised, managers can consult the KPIs to understand if the MGO is visiting enough new prospects with capacity to make a major gift.

# Benefits for MGO Managers and Beyond

## KPIs Designed to Inflect Change Across Advancement Team

The Root Cause KPIs give managers tools to understand what to coach for each frontline fundraiser. Instead of adding them as metrics for MGOs to chase, managers are trained to use them to as part of an ongoing coaching conversation with their team members.

To ensure that each KPI is accurately calculated, a new data governance policy was implemented, including new definitions for each fundraising activity and training for staff on how to record data in the CRM.

### Making Managers Stronger Coaches...

"Our intention is that the KPIs will become a coaching tool that gives managers the **data they need to understand what to coach** for their teams.

We don't want to give MGOs 18 new numbers to chase. We want to **create a stronger dialogue** between our staff members."

*Mark Koenig*
*Assistant Vice President for Advancement*
*Services, Analytics and Digital Strategy*
*Oregon State University*

### ...And Standardizing Performance Measurement Across the Shop

**Improved Data Governance**

Standardized definitions for recording and analyzing activities

↓

**Analysis and Communication**

Supervisors discuss paint points with MGOs

↓

**MGO Performance Improvement**

Fundraisers understand intermediate steps to reach goals

Prospect management staff will be responsible for data maintenance and flagging anomalies over time but will not be responsible for communicating red flags to MGOs. Managers will still be responsible for coaching and managing their teams to success using the data.

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# Root Cause KPI Compendium

## Selecting KPIs to Track at Your Institution

Use the following list to choose KPIs to track beyond baseline performance metrics To avoid overwhelming MGOs, the KPIs should be part of ongoing management conversations but should not be added to annual performance evaluations. Furthermore, consider strengthening data definitions and retraining staff on reporting activity data to ensure that KPIs are calculated consistently for all fundraising staff.

### New Gifts

- Number and value of gifts as lead solicitor
- Number and value of gifts as lead manager
- Number and value of gifts as team assist
- Value of asks vs. value of gifts received vs. prospect capacity
- Number of gifts from the same prospect or donor
- Number and value of gifts regardless of major gift threshold

### Activity

- Number and percentage of portfolio prospects visited
- Number and percentage of portfolio prospects visited multiple times
- Number of contacts with individuals not in portfolio
- Number of non-visit contacts
- Number of relationships not visited in the past six months

### Proposals

- Average time between proposal and gift received
- Number of proposals opened vs. number of proposals closed
- Percentage of pre-solicitation proposals recorded
- Average time between pre-solicitation and solicitation
- Number of proposals without pre-solicitation
- Number of prospects with an open and/or closed proposal
- Number of asks vs. number of visits

### Portfolio Composition

- Number of relationships by stage
- Number of relationships by giving level
- Value of gifts in vs. portfolio capacity
- Number of relationships per capacity range
- Value of dollars solicited vs. value of dollars received
- Value of prospect capacity by solicitation stage
- Value of asks in pre-solicitation and solicitation

### Moves Management

- Number and percentage of relationships visited
- Number of asks vs. number of visits
- Number of first contacts
- Number of first visits
- Number of qualifications
- Average time per cultivation stage
- Average time in solicitation stage
- Average time since assignment
- Average time since last visit

# Setting Strategy with Your Team

## Enhance Intermediate Goal Accountability

To help managers better support frontline fundraisers, consider the next steps and discussion questions below.

These resources will enable your team to determine current strengths and areas for improvement. After doing so, use the prioritization guide on the following pages to identify which practices to implement.

### Next Steps for Implementation

**Short-Term**

▶ Develop manager-friendly performance dashboards

▶ Brainstorm key KPIs to provide insight into MGO performance

▶ Provide guidance for collaborative goal-setting conversations

**Long-Term**

▶ Plan manager professional development to focus on coaching skills

▶ Train managers to address red flags that indicate MGO challenges

### Discussion Questions

1. How can we deploy professional development to strengthen our managers' coaching skills?

2. How do managers and their direct reports currently set annual goals? How can we make the process more collaborative?

3. Do our performance dashboards clearly communicate actionable information to managers?

4. Are MGO managers using performance data analyses that we provide? How can we maximize the use of these tools?

5. How can we ensure that managers proactively address MGO challenges throughout the year?

# Prioritization Guide

## Speeding Implementation and Ensuring Follow-Through

**Instructions:**

Based on your institution's goals and available resources, use the chart below to map out which of the practices profiled in this section you would like to prioritize. Use this document to assess viability and determine next steps.

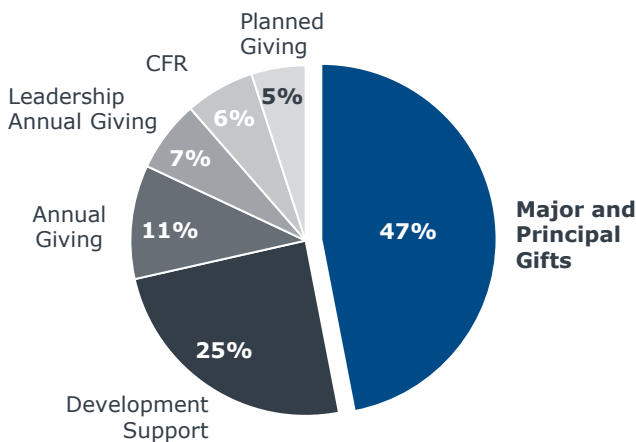| Tactic | My Institution Should Prioritize This Tactic | Notes and Next Steps |
|---|---|---|
| **Collaborative Weighted Metrics** <br><br> *University of Wisconsin-Madison* <br><br> Fundraisers and managers work together to determine annual goals and their weighting. | 1   2   3   4   5 <br><br> *Disagree*        *Agree* | |
| **Portfolio Activity Dashboard** <br><br> *University of Cincinnati* <br><br> Dashboard gives managers insight into the activity status of each prospect in an MGO's portfolio. | 1   2   3   4   5 | |
| **Root Cause KPIs** <br><br> *Oregon State University* <br><br> Data allows managers to understand the reasons behind MGO performance so they can coach accordingly. | 1   2   3   4   5 | |

# Realign Time Investments

# MGOs: Our Most Valuable Investment

## Outsized Share of Personnel Spend Brings Outsized Returns

Gift officer productivity is a critical driver of advancement's return on investment at every institution. Major and principal gift officers represent the largest segment of development staff, and a significant portion of annual budgets is invested in their salaries. While salary figures depend substantially on market competitiveness and tenure, large investments in frontline fundraising mean that advancement teams need to maximize the ROI from staffing investments, including allowing fundraisers to bring in as many new gifts per month as possible.

### MGOs Represent Largest Group of Development Personnel...

*Average Full-Time Development Employees, FY2018*



- Planned Giving: 5%
- CFR: 6%
- Leadership Annual Giving: 7%
- Annual Giving: 11%
- Development Support: 25%
- Major and Principal Gifts: 47%

### ...With a Significant Budget Line for Salaries

*Major Gift Officer Salary Ranges, FY2018[1]*



| Salary Range | Percentage |
|---|---|
| $200K+ | 3% |
| $150-$199.9K | 15% |
| $100-$149.9K | 40% |
| $50-$99.9K | 42% |
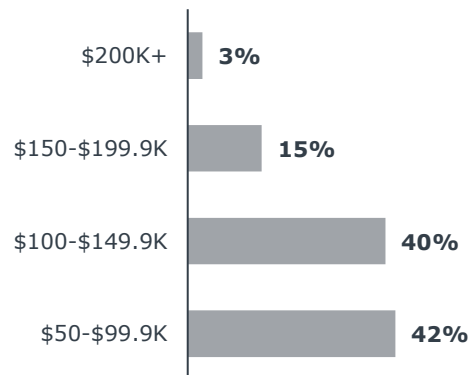
### Leading to Critical ROI

**$2,677** Average return per hour of an MGO's time

1) n=613

# Low-ROI Tasks Distract MGOs

## A Misuse of Precious Fundraising Resources

Despite the critical role of gift officers in raising advancement's ROI, they are often distracted from frontline fundraising by other tasks on campus. As the scope of advancement's responsibilities has grown over time, leaders have increasingly asked MGOs to help with a variety of non-fundraising activities, including administrative work, events, and supporting academic leaders. These asks take time that gift officers should be spending on meeting prospects and planning solicitations.

### The High Cost of 'Other Duties as Assigned'

*How Major Gift Officers Spend Time Outside of Frontline Fundraising*

| | |
|---|---|
| Administrative activities | **70%** |
| Events | **46%** |
| Dean, unit, program support | **43%** |
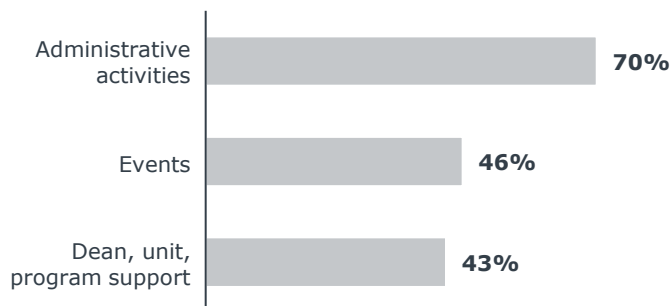
> " The biggest obstacle for MGOs is getting **sidetracked by non-fundraising tasks**. It's easy to fill days with meetings on campus that might be important but aren't raising money for the university."
>
> *Alisa Robertson*
> *Chief Advancement Officer*
> *University of Wisconsin, Madison*

### MGOs Lack Time to Maximize Dollars Raised

**50%**
Of gift officers can't do enough **visits** to qualify their portfolios due to time constraints

**52%**
Of gift officers report **not having enough time** to do everything expected of them

**55%**
Of gift officers report not spending enough time on **solicitation**

Source: Chelsey Megli et al, "Optimizing Fundraiser Performance," Bentz Whaley Flessner, 2014; "Advancement Leaders Speak 2017: Major and Planned Giving Productivity Issues Reported by Today's Gift Officers," Ruffalo Noel Levitz, 2017; Advancement Forum interviews and analysis.

# Requests Coming from Every Direction

## Common Distractions Drawing MGOs Away from Core Functions

Three common categories of distractions prevent most MGOs from maximizing dollars raised. First, academic leaders like deans and department chairs ask MGOs to help with a variety of external-facing activities. Second, university bureaucracy keeps gift officers at their desks instead of on the road. Third, advancement divisions often assign gift officers stretch projects on campus because they do not have other staff who can reliably lead them.

### Academic Leaders

"Deans treat fundraisers as **glorified party planners** or highly paid, overqualified executive assistants."

*David Lively*
*Senior Associate Vice President, Alumni Relations and Development*
*Northwestern University*

### University Bureaucracy

"Development officers spend too much time on **internal processes**, which keeps them at their desks."

*Danielle Dunbar*
*Associate Vice President, Development*
*University of Saskatchewan*

### Advancement Division

"We as an industry are inundating major gift officers with all sorts of tasks that **get in the way of raising major gifts**."

*Nick Linde*
*Assistant Vice President, Central Development*
*University of Nebraska Foundation*

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# One Step Closer to Burnout

## Demands for MGO Time Increase Departure Risks

The MGOs most likely to be distracted from frontline fundraising are the reliable superstars on any team. These staff members already excel at managing portfolios, may be looking for growth opportunities, and are a team's go-to people whenever a new project needs to be completed.

Yet all of these non-fundraising asks may lead high performers to burnout due to overwork, inability to exceed goals, and pressure to excel at tasks outside of their skillset. By constantly distracting the best MGOs, advancement managers increase the odds that they leave their current institution, an expensive risk to take.

> **Highest Performers at Greatest Risk of Distraction**
>
> "We see that our superstars can do anything, so we add more and more things to their plates. It takes them away from their favorite parts of this job, and they raise less money.
>
> We're **pushing people out the door** without even realizing it."
>
> *Vice President for Development and Alumni Relations*
> *Public Master's University*

### The Not-So-Hidden Costs of Fundraiser Turnover

**2.8 years**
Average fundraiser **tenure**

**$647K**
Drop in **proposal dollars** granted between MGO departure and new hire arrival

# Realign Time Investments

## Shifting Away from Low-Impact Activities

To eliminate the distractions that prevent MGOs from maximizing fundraising productivity, advancement leaders should focus on three core areas: refocusing the asks made by academic leaders, reducing internal waiting paperwork and processes, and rescoping the role of major gift officers to focus on a smaller set of core competencies.

### Recover Time from Dean Creep

Reduce expectations for activities outside of development purview

- Practice 9: Time Allocation Predictive Model

### Eliminate Internal Friction Points

Increase fundraisers' ability to make decisions and act on strategy

- Practice 10: Responsibility Identification Matrix
- Practice 11: Automated Gift Agreement Workflow

### Rescope the Major Gift Officer Role

Reconsider the activities expected of major gifts officers

- Practice 12: Portfolio Reduction
- Practice 13: Responsibility Unbundling

Source: Advancement Forum interviews and analysis.

# Practice 9: Time Allocation Predictive Model

**Practice in Brief**

Advancement develops an interactive model that shows fundraising production based on how much time MGOs dedicate to fundraising-related activities. The model encourages deans to free their MGOs to focus on core responsibilities.

**Problems Addressed**

Academic leaders often misinterpret the role of unit-based or unit-assigned gift officers. In many cases, deans have not considered the ROI tradeoffs that happen when fundraisers are distracted from major gifts by unrelated external commitments.

**Diagnostic Questions**

1. Are deans asking unit-based fundraisers to spend too much time on non-fundraising related tasks?

    ___Yes            ___No

2. Do academic leaders need additional resources to understand the case for investing in frontline fundraising?

    ___Yes            ___No

3. Do deans struggle to identify who on their teams, beyond MGOS, can help with external functions?

    ___Yes            ___No

*If you answered "Yes" more times than "No," you may wish to create a Time Allocation Predictive Model for academic leaders at your institution.*

**Institution Profiled**

University of Miami

- Institutional control: Private
- Enrollment: 17,331 (11,117 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Large Suburb (Coral Gables, FL)

# An Unbounded Academic Wishlist

## Deans See MGOs as Utility Players—And Forget They're There to Fundraise

Deans frequently underestimate the ROI tradeoffs of distracting their frontline fundraisers. Academic leaders often view fundraisers as the best staff members to take on any externally-facing tasks, so they fill gift officers' time with managing advisory boards, editing newsletters, and planning events (a practice commonly called "dean creep"). This practice continues because deans may be unable to identify other staff who can manage the growing number of external commitments facing their divisions. As a result, overall fundraising productivity never approaches the unit's estimated prospect capacity.

**'A Few Simple Asks' Quickly Reduce Fundraising Capacity...**

○ *"Manage the new volunteer advisory board"*

○ *"Draft our monthly division newsletter"*

○ *"Coordinate catering for special events"*

Fundraising productivity declines

**...Due to Confusion Surrounding MGOs' Role**

✖ Misunderstanding of **core responsibilities**

✖ Increased number of **externally-facing commitments**

✖ Lack of **alternative staffing** options

✖ Limited awareness of **ROI tradeoffs**

Source: Advancement Forum interviews and analysis.

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# Modeling Out Tradeoffs for Deans

## University of Miami Illustrates the Cost of Non-Fundraising Asks

To reduce or eliminate dean creep, the University of Miami created an interactive model to show deans the ROI tradeoffs of distracting their fundraisers. The spreadsheet-based model includes sliders that deans can manipulate to estimate their unit's fundraising based on how much time MGOs can dedicate to prospects and donors. For example, the model will show what a unit can raise if its MGOs spend 50% of their time fundraising compared to a fundraising estimate if MGOs spend 80% of their time raising gifts.

### Critical Details to Make the Case to Academic Leaders

**Interactive Model**
Spreadsheet allows deans to explore all alternatives before deciding

**Extended Time Horizon**
Campaign timeline shows long-term value of gift officers' time

**Resource Planning Alternatives**
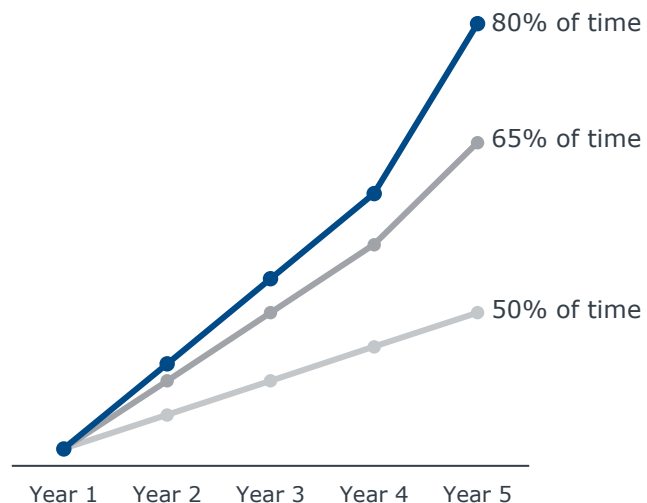Discussions include task allocation advice beyond hiring additional MGOs

**Provost Buy-In**
Difficult decisions previewed during campaign discussions

### Choose Your Own Fundraising Adventure

*Adjustable Model Estimates Returns Based on Dedicated MGO Fundraising Time*



80% of time
65% of time
50% of time

Year 1   Year 2   Year 3   Year 4   Year 5

By showing fundraising estimates over a multi-year time horizon, deans understand the cumulative impact of freeing MGOs' time. The team at the University of Miami began using the Time Allocation Predictive Model during comprehensive campaign planning, so deans were able to think strategically about allocating staff to meet their fundraising goals.

Source: Advancement Forum interviews and analysis.

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# Reclaiming Time for Major Gifts

## With Deans on Board, Campaign Planning Maximizes Fundraising Potential

By explaining fundraiser ROI time tradeoffs in terms that academic leaders understand, advancement at Miami has seen improvements in how much time unit-based MGOs dedicate to frontline fundraising. In addition to showing deans the data, advancement has led discussions about how to reallocate responsibilities to free up time for fundraising.

Some unit functions, like prospect research, were centralized within advancement to benefit from economies of scale. At the same time, deans committed to growing their own communications and events staff to take the burden of these activities away from MGOs.

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### Sending the Message on Deans' Terms

"Our deans are scientists and researchers who **understand data and like to analyze it.**

Using data helped them visualize the changes we were talking about. It gave them confidence in an area where they sometimes feel less informed."

*Darlene Rebello-Rao*
*Associate Vice President,*
*Campaign and Strategic Initiatives*
*University of Miami*

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### Part of a Team Effort to Increase Fundraising Returns

**Reallocating Responsibilities to Free MGO Time**

- Advancement increases centralized support functions
- Deans grow unit-based communications and events capacity

**75%** Goal for **dedicated fundraising time**

**+25%** Estimated increase in **fundraising potential**

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Moving forward, deans have committed to reserving at least 75% of their gift officers' time for frontline fundraising activities, which will allow advancement to increase estimated dollars raised per year without hiring additional staff.

Source: Advancement Forum interviews and analysis.

# Implementing a Time Allocation Predictive Model

## Online Tools to Communicate ROI Tradeoffs to Academic Partners

The Advancement Forum has developed an interactive model to facilitate the creation of a Time Allocation Predictive Model for academic partners on your campus. Download the pre-programmed spreadsheet to quickly compile data and report tradeoffs to stakeholders across campus.

To communicate with academic partners, use the "print to image" function to integrate data estimates into existing presentations. Alternatively, walk academic partners through the spreadsheet to provide an interactive look at the results of time tradeoffs.

**Use EAB's Ready-to-Use Model to Facilitate Communication Across Campus**



Downloadable spreadsheet includes:

- Data entry form to record current fundraiser performance
- Pre-programmed calculations to estimate future potential
- Interactive slider to view potential performance with additional fundraising time

Download the Time Allocation Predictive Model spreadsheet here.

# Practice 10: Responsibility Identification Matrix

**Practice in Brief**

One document that identifies who is responsible, accountable, consulted, and informed for each step of the cultivation process. Gift officers develop a bias to action instead of waiting for input at every step of the cultivation cycle.

**Problems Addressed**

Gift officers often assume they need approval before many tasks, which slows the cultivation process and prevents them from reaching annual goals.

**Diagnostic Questions**

1. Is there confusion amongst gift officers about which tasks can be completed independently and which require permission?

    ___Yes          ___No

2. Do gift officers lose time debating who to ask for input?

    ___Yes          ___No

3. Do too many people provide input at each stage of cultivation?

    ___Yes          ___No

*If you answered "Yes" more times than "No," you may wish to create a Responsibility Identification Matrix for your frontline fundraising teams.*

**Institution Profiled**

North Central College

- Institutional control: Private
- Enrollment: 2,928 (2,681 undergraduate)
- Carnegie classification: Master's University
- Campus setting: Midsize City (Naperville, IL)

# Waiting for Decisions Causes Significant Delays

## MGOs Lose Momentum While Stakeholders Provide Input

Decisions in higher education, including fundraising, are traditionally made by bringing all stakeholders to the table to provide input, which slows the process and prevents action from being taken quickly. These slow decisions demonstrate the Ringelmann Effect, in which every member of a group becomes less productive as the group gets larger.

As major gifts become more complex, more and more stakeholders ask to be involved. While bringing everyone to the table increases buy-in, it can lead to increased frustration and slow gift processes from start to finish.

### The Pitfalls of Inviting Everyone to the Table

**Ringelmann Effect**: The tendency for individualized group members to become less productive as group size increases.

Who else should give feedback before we decide on this **strategy**?

Who makes the final call on a multidisciplinary **solicitation date**?

Who is responsible for tracking edits to this **gift agreement**?

### Complex Gifts Increase Stakeholder Involvement Across Campus

| | |
|---|---|
| Major gifts officer | Dean, School of Business |
| Associate Vice President, Development | Director, Alumni Relations |
| Dean, School of Engineering | Analyst, Prospect Research |

⬆ Frustration

⬆ Time from idea to decision

Source: Maximilien Ringelmann, "Research on Animate Sources of Power: The Work of Man," *Annals of the National Agronomic Institute*, 1913; Advancement Forum interviews and analysis.

# Giving Gift Officers the Go-Ahead to Act

## North Central College Develops Bias Toward Action for Gift Officers

Because of this culture of inviting everyone to the table, gift officers often get stuck in a never-ending cycle of waiting for approval. To encourage MGOs to take action, North Central College outlined when MGOs need to seek input. Taking a lesson from private sector project management, development leadership created a RACI Matrix for every step in the gift process. For every stage, the matrix lists who should provide insight and who receives updates before a gift officer can move forward.

### Gift Officers Default to Waiting for Permission

*I don't want to make decisions prematurely*

*When I have questions, I tend to seek as much input as possible*

*Who needs to approve my next move?*

*How many people should be included on progress updates?*

### RACI Matrix Clarifies When to Act

| | |
|---|---|
| **R**esponsible<br>Completes task or makes decision | Gift officer |
| **A**ccountable<br>Approves completed work product | Gift officer manager |
| **C**onsulted<br>Provides input as needed, receives updates | Prospect management analyst |
| **I**nformed<br>Receives updates, but is not formally consulted | Executive director, prospect management analyst |

### Critical Elements for Success

✔ Articulate division of responsibilities

✔ Clarify when to act without waiting for input

✔ Reduce questions about who to inform

In the past, gift officers may have waited for input from everyone on the list before moving forward in cultivation. While many staff members may need to be informed about a gift strategy, very few team members may need to provide input. As a result, gift officers are developing a bias to action instead of waiting for approvals.

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# Sample Responsibility Identification Matrix

Adapt the sample matrix below to cultivation processes and expectations at your institution. Clarify the levels of engagement required at each stage to allow gift officers to act instead of waiting for input as often as possible. Distribute the matrix to all parties involved to ensure a shared understanding of roles and responsibilities.

| | Responsible | Accountable | Consulted | Informed |
|---|---|---|---|---|
| **Identification**<br><br>Goal: Assign prospect to portfolios<br>• Identify individuals capable of making a major gift<br>• Determine inclination and gather information to decide which gift officer should be assigned to the prospect | • Research and Prospect Management Analyst | • Director, Prospect Research | • AVP, Development | • Prospect Management Analyst<br><br>If applicable:<br>• Director, Annual Giving<br>• Director, Alumni Engagement<br>• Director, Planned Giving |
| **Qualification**<br><br>Goal: Attempt to move prospect to cultivation or exit/reassign within 90 days<br>• Develop prospect qualification strategies and engage advancement team to identify partners<br>• Engage prospect in purposeful, strategic contacts | • Major Gift Officer | • MGO Manager | • Research and Prospect Management Analyst<br><br>If applicable:<br>• Director, Annual Giving<br>• Director, Alumni Engagement<br>• Director, Planned Giving | • AVP, Development<br>• Prospect Management Analyst |
| **Cultivation**<br><br>Goal: Move prospect to Solicitation within six to 18 months<br>• Actively manage prospect by building relationships and preparing to make ask<br>• Refine strategy and update proposal information based on evolving conversation | • Major Gift Officer | • MGO Manager | • AVP, Development<br>• Research and Prospect Management Analyst<br><br>If applicable:<br>• Director, Corporate Relations<br>• Director, Grants | If applicable:<br>• Director, Annual Giving<br>• Director, Alumni Engagement<br>• Director, Planned Giving |

# Sample Responsibility Identification Matrix (cont.)

| | Responsible | Accountable | Consulted | Informed |
|---|---|---|---|---|
| **Solicitation**<br>Goal: Close the gift<br>• Prepare for solicitation and determine who should make ask<br>• Make ask<br>• Determine next steps for stewardship<br>• If proposal is rejected: determine next steps based on knowledge gained during cultivation | • Major Gift Officer<br>• Solicitation Partners | • MGO Manager | • AVP, Development<br>• Research and Prospect Management Analyst | • Prospect Management Analyst<br><br>If applicable:<br>• President<br>• VP, Advancement<br>• Director, Planned Giving<br>• Director, Annual Giving<br>• Director, Corporate Relations<br>• Director, Grants<br>• Director, Alumni Engagement |
| **Stewardship**<br>Goal: Ensure donor's continued philanthropic support<br>• Acknowledge gift through impact data and donor recognition<br>• Gauge donor's ongoing giving interest and potential readiness for future gifts<br>• Re-qualify donor for a future gift | • Major Gift Officer<br>• Director, Stewardship | • MGO Manager | • AVP Development<br>• Research and Prospect Management Analyst | If applicable:<br>• Director, Planned Giving<br>• Director, Annual Giving<br>• Director, Alumni Engagement |

# Practice 11: Automated Gift Agreement Workflow

**Practice in Brief**

Gift officers submit an intake form with questions related to gift size and gift destination, and out of the 12 pre-designed templates is automatically drafted. The agreement is sent to anyone who needs to approve it. Sharepoint and Microsoft Flow are used to manage version control and send approval reminders.

**Problems Addressed**

Gift agreements must go through a series of approvals before they can finally be sent to the donor. Gift officers lose time drafting the proposal, following up with academic leaders for approval, and managing requested changes.

**Diagnostic Questions**

1.  Do major gift officers spend too much time waiting for gift agreements to be approved by partners across campus?

    ____Yes            ____No

2.  Are gift agreements created from scratch for every donor?

    ____Yes            ____No

3.  Is it difficult to manage version control while receiving feedback on drafted gift agreements?

    ____Yes            ____No

*If you answered "Yes" more times than "No," you may wish to develop an Automated Gift Agreement Workflow for your advancement team.*

**Institution Profiled**

California Institute of Technology

- Institutional control: Private
- Enrollment: 2,233 (948 undergraduate)
- Carnegie classification: Doctoral University
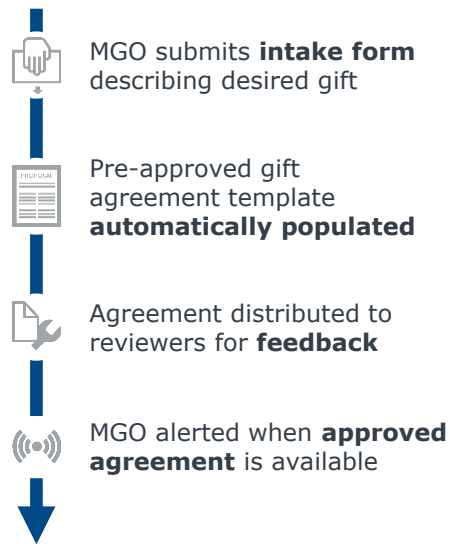- Campus setting: Midsize City (Pasadena, CA)

# Saving Time by Automating Bureaucracy

## Caltech Shortens Gift Agreement Process to Save MGOs Time and Trouble

Instead of spending time with prospects, MGOs often lose time to paperwork that must be completed on campus. Staff at Caltech realized that MGOs were spending too long waiting for gift agreements to be approved by stakeholders across campus, so they automated the process.

When a gift agreement is needed, individual MGOs answer a series of questions about what the proposed agreement will include. The automated system generates and fills in one of twelve templates. Once templated, the agreement is automatically sent to anyone who needs to approve it.

### Automated Process Streamlines Gift Agreement Approvals

MGO submits **intake form** describing desired gift

Pre-approved gift agreement template **automatically populated**

Agreement distributed to reviewers for **feedback**

MGO alerted when **approved agreement** is available

**50%** Average reduction in days from submission to approval

### Taking Reminder Emails Off MGOs' To-Do Lists

*Time Intensive Tasks Eliminated*

✖ Drafting gift agreements

✖ Following up with reviewers individually

✖ Managing document version control

✖ Adding additional information throughout approval process

Version control is managed through document management software, and automatic reminders are sent if approvals don't arrive on schedule. As a result, gift officers no longer spend time following up with academic leaders or managing edits from across campus as stakeholders submit feedback simultaneously.

Source: Advancement Forum interviews and analysis.

eab.com

# Spending MGO Mindshare on the Right Things

## Caltech's Automated Process Frees Time and Attention

Thanks to the automated process, gift agreements at Caltech are approved in 50% less time than before the system was implemented, and MGOs can spend more time engaging donors instead of filing paperwork on campus. Agreements for principal gifts and complex priorities may still require substantial attention, but turnaround on most standard agreements has been shortened from two months to one month, with some documents being approved within 24 hours of creation.

> **Allowing Staff to Focus on Complex Gift Agreements**
>
> "We are executing more gift agreements per year, and we can only attribute our success in handling the increase in volume to the workflow process.
>
> By automating everything we can, we can spend our staff's time on the **complicated documents that merit their attention**."
>
> *Chris Meneses*
> *Associate Director of*
> *Advancement Information*
> *California Institute of Technology*

### Making It Work on Your Campus

- Identify main **point of contact** to oversee process

- Leverage **technology** for document management and collaboration

- Create **workflow tracker** to share status updates

- Plan **training sessions** to clarify steps and expectations

Source: Advancement Forum interviews and analysis.

# Practice 12: Portfolio Reduction Initiatives

### Practice in Brief

Gift officer portfolios were reduced to approximately 50 prospects to increase donor engagement and cultivation speed. Metrics were re-weighted to emphasize the most critical outcomes: solicitations, dollars raised, and number of major gifts.

### Problems Addressed

Portfolios are too large for gift officers to cultivate and solicit effectively. To reach their annual goals, gift officers are expected to complete time-intensive, low-return activities for numerous prospects. The number of tasks necessary to accommodate their large portfolios ultimately distract them from closing gifts.

### Diagnostic Questions

1.  Do a significant portion of assigned prospects go unengaged each year?

    ____Yes          ____No

2.  Do gift officers maintain a substantial group of "reserved" prospects who go uncontacted but cannot be reassigned?

    ____Yes          ____No

3.  Do gift officers avoid portfolio churn instead of qualifying new prospects?

    ____Yes          ____No

*If you answered "Yes" more times than "No," you may wish to implement Portfolio Reduction Initiatives for your frontline fundraising teams.*

### Institution Profiled

Queen's University

- Institutional control: Public (Canada)
- Enrollment: 24,143 (18,935 undergraduate)
- Carnegie classification: Doctoral University
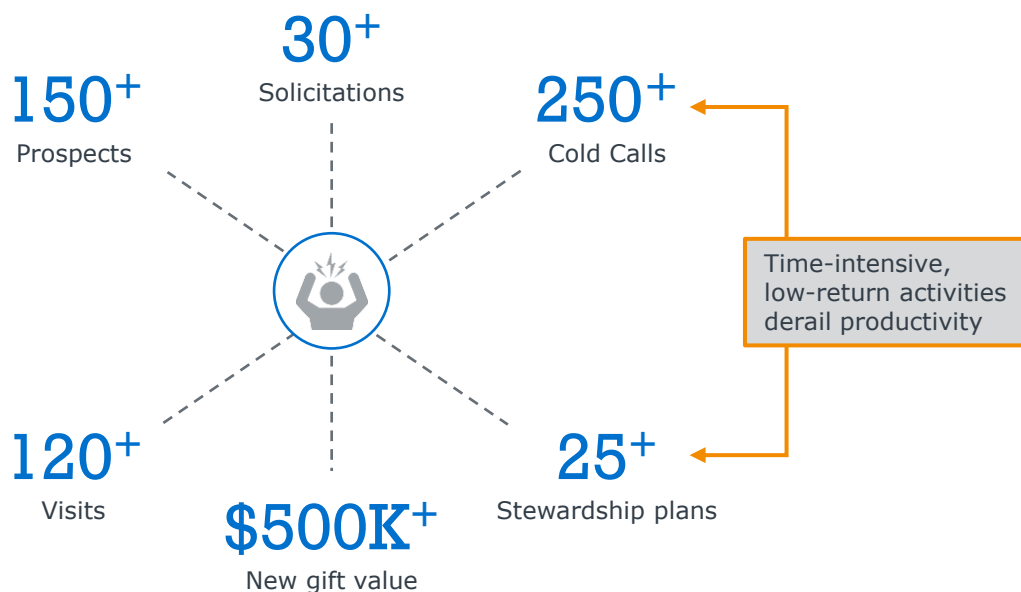- Campus setting: Midsize City (Kingston, ON)

# A Generation of MGOs Stretched Thin

## Lifecycle Responsibility and Oversized Portfolios Distract from Closing Gifts

To make fundraisers more efficient, advancement leaders need to rethink MGOs' overall scope of responsibility. Currently, gift officers' jobs stretch them between numerous time-intensive yet low-return activities, like conducting qualification calls and drafting stewardship plans.

To move the needle on dollars raised and donors engaged, fundraisers need to be empowered to streamline their focus on the high-return activities that require their attention, like meeting with donors and planning solicitations.

**Largest MGO Time Allocations Are Lowest-Value Tasks**

150+
Prospects

30+
Solicitations

250+
Cold Calls

120+
Visits

$500K+
New gift value

25+
Stewardship plans

Time-intensive, low-return activities derail productivity

eab.com

# 'Project X' Sweeps the Continent

## Northwestern and DePaul Set the Pace for Portfolio Reduction

Many institutions have reduced portfolio size as a first step to help gift officers use their time more efficiently. Inspired by David Lively's *Managing Major Gift Fundraisers: A Contrarian's Guide,* advancement teams have reduced portfolios to no more than 75 prospects per fundraiser to increase focus, move prospects to a gift faster, and reduce the number of prospects who are held in portfolios but ignored by fundraisers.

**Increasing Efficiency by Dramatically Shrinking Portfolios**



"**Shrinking portfolios** to give all fundraisers access to the best prospects— so that they're able to concentrate on only those prospects capable of and likely to make a gift and so that their fallow prospects are available to be solicited by other successful fundraisers...

...Will **sharpen the focus on raising major gifts**."

*David Lively*
*Senior Associate Vice President*
*and Campaign Manager*
*Northwestern University*

# Honey, I Shrunk the Portfolio

## Increasing Solicitations by Reducing Donor Coverage Expectations

The benefits of portfolio shrinking include greater portfolio churn and more efficient prospect cultivation. Queen's University recently shrank every gift officer's portfolio to approximately 50 prospects. At the same time, MGO metrics were re-weighted to emphasize critical donor outcomes, like solicitations and dollars in, while de-emphasizing activities that distract from donor cultivation.

Shrinking portfolios allowed the team to make more solicitations and bring in more gifts compared to the year before the new strategy was implemented. Queens has also seen cultivation time decrease, which allows gift officers to cultivate more individuals per year.

### Queen's University Asks MGOs to Cover Fewer Prospects…

**50**

**Prospects** in average portfolio, down from 100+

### …While Aligning Metrics with Critical Outcomes

⬆ *Increased Weight*

- Major gift solicitations
- Number of major gifts raised
- Total dollars raised
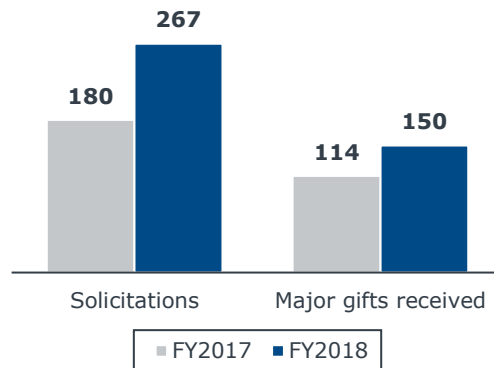- Assessment visits

⬇ *Decreased Weight*

- Total visits
- Stewardship visits

### Refocused MGOs Increase Major Gift Efficiency

*Growth in Number of Asks and Gifts Received Since Shrinking Portfolios*

| | Solicitations | Major gifts received |
|---|---|---|
| FY2017 | 180 | 114 |
| FY2018 | 267 | 150 |

**-37%** Decrease in average **cultivation time**

# Practice 13: Responsibility Unbundling

## Practice in Brief

Activities that do not relate to raising major gifts are removed from major gift officer responsibilities and are reassigned to other advancement staff.

## Problems Addressed

In addition to having large portfolios, gift officers are expected to handle all parts of the donor lifecycle. Time-intensive activities such as managing administrative responsibilities, qualifying pipeline prospects, or developing multiple unique stewardship plans often derail productivity.

## Diagnostic Questions

1.  Do gift officers lack time to focus on cultivation and solicitation?

    ____Yes            ____No

2.  Does your division have non-frontline fundraising staff who could manage current discovery or donor engagement initiatives?

    ____Yes            ____No

3.  Are there staff on your team who have applicable skills that could support the donor lifecycle?

    ____Yes            ____No

*If you answered "Yes" more times than "No," you may wish to consider Responsibility Unbundling at your institution.*

## Institutions Profiled

Rutgers University

- Institutional control: Public
- Enrollment: 50,254 (36,039 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Small City (New Brunswick, NJ)

University of Cincinnati

- Institutional control: Public
- Enrollment: 37,886 (26,762 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Large City (Cincinnati, OH)

Gonzaga University

- Institutional control: Private
- Enrollment: 7,563 (5,304 undergraduate)
- Carnegie classification: Doctoral University
- Campus setting: Midsize City (Spokane, WA)

# 'If Not Us, Then Who?'

## Tomorrow's Prospects Risk Post-Lively Neglect

While shrinking portfolios offers numerous possibilities for increased gift officer focus and overall ROI, it creates questions about who within the advancement team should take responsibility for parts of the donor lifecycle that are beyond gift officers' purview. For many advancement teams, smaller portfolios require evaluating which functions can be reassigned to other staff to avoid neglecting donors and prospects who are not actively being cultivated for a major gift.

> "When we asked our MGOs to focus only on prospects who they expected to give major gifts in the next two years, we realized that nobody was left to manage discovery. No one owned stewardship.
>
> Shrinking portfolios solves part of the problem, but **someone has to do the rest of the work** to manage the donor lifecycle."
>
> *Vice President for Advancement*
> *Public Research University*

# Unbundling the Major Gift Officer

## Three Ways to Reassign Low-Return Activities

To increase gift officer focus on donor cultivation and respond to the challenges unearthed by portfolio shrinking efforts, colleges and universities are increasingly pursuing unbundling strategies in which some MGO responsibilities are reassigned within the advancement division.

Numerous tasks could be included in unbundling initiatives. For example, Rutgers, The State University of New Jersey has reassigned all administrative responsibilities to development associates who support MGO efforts.

| | | |
|---|---|---|
| **RUTGERS**<br>THE STATE UNIVERSITY OF NEW JERSEY | **GONZAGA** UNIVERSITY | University of **CINCINNATI** |
| **Managing Administrative Responsibilities** | **Qualifying Pipeline Prospects** | **Stewarding Long-Term Relationships** |
| **Development Associates** | **Prospect Research Discovery Specialists** | **Donor Experience Team** |
| • Manage calendars for internal and external commitments<br><br>• Coordinate work with campus partners<br><br>• Gather information about assigned prospects and travel plans | • Cold call prospects before portfolio assignment or gift officer outreach<br><br>• Tailor content based on identified interests<br><br>• Make multiple contact attempts using a variety of communication channels | • Connect centrally-managed stewardship offerings to individual donors<br><br>• Set strategy and manage execution until cultivation restarts<br><br>• Create concierge-style experience for donors |

At the same time, Gonzaga University identified staff within prospect research who could conduct discovery calls instead of assigning them to MGOs. At the University of Cincinnati, a Donor Experience Team has taken stewardship off gift officers' to-do lists, so they can focus on bringing in new gifts.
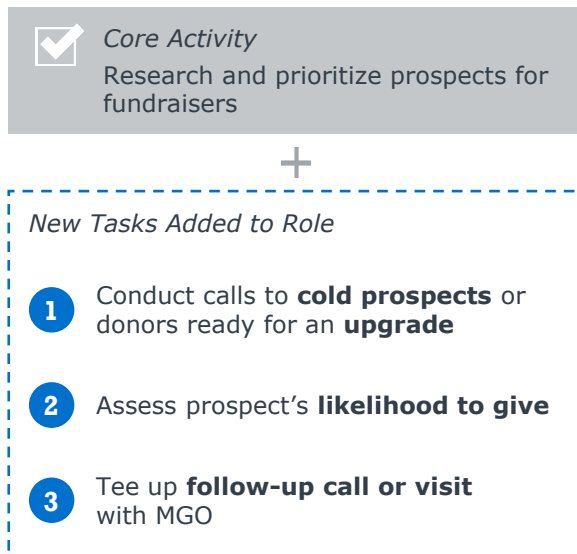
eab.com

# Shifting Responsibility for Cold Calling

## Gonzaga Removes Burden of High-Volume Outreach from MGOs

Cold calling is one of the lowest-return, highest-volume tasks assigned to MGOs. Despite its value, MGOs often lose time to qualification calls when they should be working with qualified, responsive prospects. Advancement leaders at Gonzaga University realized that prospect research staff could support cold calling efforts to free MGOs for higher-ROI activities.

Prospect research has taken over responsibility for 'inside sales,' the process of connecting with prospects without an in-person visit. On these calls, staff assess a prospect's likelihood to give and tee-up follow up steps from a frontline fundraiser who can move the prospect into cultivation.

### Adding "Inside Sales" Responsibilities to Prospect Research

☑ *Core Activity*
Research and prioritize prospects for fundraisers

**+**

*New Tasks Added to Role*

**1** Conduct calls to **cold prospects** or donors ready for an **upgrade**

**2** Assess prospect's **likelihood to give**

**3** Tee up **follow-up call or visit** with MGO

### The Right Staff for the Job

" Prospect research staff have expertise that makes cold calling much more effective.

They have more **time to add personal details** to emails and calls, because they aren't under pressure to go on 100 visits.

On the phone, they can identify who will give, because **they know what indicators to listen for**."

*Stephanie Rockwell*
*Assistant Vice President for*
*Development and Operations*
*Gonzaga University*

Source: Advancement Forum interviews and analysis.

# Scaling Outreach in Two Hours Per Day

## Prospect Research Cold Callers Allow Fundraisers to Focus on Follow-Up

To pilot this approach, one prospect researcher at Gonzaga was trained to conduct qualification calls for leadership annual giving prospects. With two hours of calling per day, prospect research made a measurable impact on new annual leadership gifts during a six-week pilot period.

Given the success of unbundling cold calling from annual leadership giving, Gonzaga is considering expanding the approach to major gifts, which is expected to boost MGO productivity without jeopardizing the donor pipeline.

### New Approach Piloted During Prospect Outreach Sprint

**12 calls** per day

**+**

**4 days** of calls per week

**+**

**6 weeks** to test approach

**→**

**288**

**Cold calls** made by prospect research staff

### Increasing Reach and Total Dollars Raised

**50%**
Response rate to cold calls during sprint

**36%**
Of prospects made a gift thanks to call

**12%**
Of prospects upgraded level of giving

Source: Advancement Forum interviews and analysis.

eab.com

# Setting Strategy with Your Team

## Realign Time Investments

To help gift officers spend more time on core activities, consider the next steps and discussion questions below.

These resources will enable your team to determine current strengths and areas for improvement. After doing so, use the prioritization guide on the following pages to identify which practices to implement.

### Next Steps for Implementation

**Short-Term**

▶ Clarify when MGOs can act without waiting for team input

▶ Analyze data to show deans the value of fundraising time

▶ Identify internal processes to streamline or automate

**Long-Term**

▶ Test initiatives for prospect research to conduct cold calls

▶ Reduce portfolios to 50-75 prospects per gift officer

### Discussion Questions

**1** How do our gift officers currently spend their time? How can we gain more time for fundraising?

**2** Do campus partners understand how distracting fundraisers will decrease our ability to raise major gifts?

**3** How long do gift proposal approval processes take? How can we make the process faster and easier to manage?

**4** Are our portfolios the right size for gift officers to reach all their assigned prospects?

**5** What MGO responsibilities can be reassigned to other advancement staff?

Source: Advancement Forum interviews and analysis.

eab.com

# Prioritization Guide

## Speeding Implementation and Ensuring Follow-Through

**Instructions:**

Based on your institution's goals and available resources, use the chart below to map out which of the practices profiled in this section you would like to prioritize. Use this document to assess viability and determine next steps.

| Tactic | My Institution Should Prioritize This Tactic | Notes and Next Steps |
|---|---|---|
| **Time Allocation Predictive Model**<br><br>*University of Miami*<br><br>Interactive model demonstrates the financial impact of distracting MGOs from fundraising. | 1   2   3   4   5<br><br>*Disagree*        *Agree* | |
| **Responsibility Identification Matrix**<br><br>*North Central College*<br><br>Articulated list of when MGOs can act alone compared to when they need to seek input. | 1   2   3   4   5 | |
| **Automated Gift Agreement Workflow**<br><br>*California Institute of Technology*<br><br>Automated process drafts agreements and manages approvals from campus partners. | 1   2   3   4   5 | |
| **Portfolio Reduction Initiatives**<br><br>*Queen's University*<br><br>Smaller portfolios allow MGOs to focus on increasing solicitations and closing gifts. | 1   2   3   4   5 | |
| **Responsibility Unbundling**<br><br>*Rutgers University, Gonzaga University, University of Cincinnati*<br><br>Low-return activities are removed from MGO responsibilities. | 1   2   3   4   5 | |