

A background image showing several hands clasped together in a supportive grip, overlaid with a semi-transparent dark blue and orange geometric pattern.

# 6 WAYS FUNDRAISERS CAN UP THEIR

---

## TALENT MANAGEMENT STRATEGY



# WHY DOES GIFT OFFICER MANAGEMENT MATTER?

Fundraising managers are under tremendous pressure to keep their team together long enough to meet fundraising goals. Our research has shown that among U.S. higher education institutions, the average gift officer is at an organization for less than three years, but the time to cultivate a prospect from first visit to first major gift is more than four and a half years. With a large portion of your budget going to gift officer salary, it's critical that your management practices improve gift officer effectiveness by closing this gap.

## How do you create a management environment which encourages retention and high performance?

Creating a management environment where gift officers thrive requires a time investment away from the work of fundraising. We have learned from colleges and universities from around the country that investing the time to create strong management processes has helped them to meet aggressive fundraising goals with confidence. We're sharing the top six management priorities that our customers say have improved their ability to retain strong teams and meet aggressive fundraising goals. Check out the table below for a sneak-peek of what you'll learn in this best practice brief.

<b>MANAGEMENT BEST PRACTICE SUGGESTION</b>	<b>HOW TO ACCOMPLISH IT</b>
Dial in the focus	Create and share goals.
Formalize a mentoring program	Schedule regular check-ins with staff, especially during their first year on the job
Make time for useful training	Invest in your team's professional development
Foster a sense of commitment.	Reward people based on their contributions to the group
Use the right tools.	Arm your frontline fundraisers with donor information to aid in cultivation
Set officer goals and benchmarks	Set and track appropriate gift officer goals

## 1. Dial in the Focus

A shared focus and a common goal is at the heart of every high-performing fundraising operation. One large national public institution in the Midwest shared with us how their organization builds consensus and shared expectations at all levels of the organization. Using data to define goals for the next fiscal year, each gift officer creates a list of opportunities that they expect to close. Then the advancement team and the applicable dean go through these lists and strategize. These meetings are designed to provide transparency in the goal-setting process and establish the dean’s approval for monetary goals.

To some, extensive goal-setting and stakeholder buy-in seems like a distraction when the team could be out fundraising. However, this time investment up front helps the team increase their fundraising effectiveness. This university has calculated the time investment they need for management activities versus time spent fundraising.

### Time Spent Setting Goals and Managing a Senior Development Officer

<b>TIME ALLOCATED PER MONTH</b>	<b>ACTIVITY</b>
5 Hrs	Vice President management work and meetings
4 Hrs	Meeting with their team
4 Hrs	Meeting with their dean
2 Hrs	Reporting work

Management meeting time totals only 15 hours a month (or 9.3% of their available working time). That leaves more than 145 hours a month to focus on the core work of raising funds.

## 2. Formalize a Mentoring Program

Great fundraising managers build the team they need for the goals they’d like to accomplish. This is always a work in progress, so you and your team should experiment to see what works. Start by creating regular check-ins with staff, especially during their first year on the job. Staff of all levels benefit from regular contact with other team members who can answer questions, give advice, and promote professional growth.

One large national public university on the West Coast uses a voluntary mentorship program designed to promote professional development and increase their pool of talented employees university-wide. Any employee from any university office can create a mentorship project. A team in HR publishes it internally and mentees can choose mentors and mentorship projects which look interesting to them. For all who participate, the program is a way to increase a pool of valuable talent, invest in cross-department applicants, and improve staff retention.

Developing a mentorship program helps forge professional relationships between employees and creates a way for people to share skills and develop community. A solid mentorship program gives employees the skills they need to meet aggressive fundraising goals.

### 3. Make Time for Useful Training

Everyone benefits from training, no matter what stage of their career they're in. Training can help individuals master new skills particular to their job, or can bring the office together around a topic of general interest. Training is an opportunity to communicate to your team that you're invested in their success with your organization, so choose training options wisely.

When determining training curriculum for your team, take into consideration your team's various learning styles. Some do best by reading content, while others need to view or listen to absorb key concepts. There will also be some who do best by practicing something new by using role-play or other methods. When you match the training delivery mechanism to the team's various learning styles, you achieve better comprehension and understanding of the important information you are wanting to convey. As a manager, you may have a sense of your team's learning styles, but it can't hurt to revisit this area with your team to ensure they will get the most out of the training initiative.

### 4. Foster a Sense of Commitment

Great fundraising teams share a sense of commitment to their mission and to each other. Inspiring your team to do their best in pursuit of a common goal is well worth the extra effort. Foster a tight-knit team by rewarding people based on their contributions to the group. Consider awards or incentives to the development colleagues who have helped others on the team be successful. Some institutions even offer 100% credit to gift officers who close joint gifts.

Finding creative ways to celebrate team success and reinforce people's commitment to shared goals helps you develop a team capable of higher performance fundraising.

### 5. Use the Right Tools

It's easier to get work done and meet goals if you have tools in place that are designed to facilitate fundraising. Make sure your frontline fundraisers have what they need to easily access donor data and information. The more effectively they're able to leverage information, the more likely they will be successful. To help them along, managers need to measure individual results, chart progress and compare their work to others.

### 6. Set Officer Goals and Benchmarks

As a leader in advancement, you need to have a current pulse on how gift officers are performing both in the short and long-term. Keep track of the officer performance information that's important to you so that you can use it to set goals and forecast results. Track how frequently officers are visiting donors. What's the percentage of visits that result in donation? Which officers are writing the most proposals? How often are they able to close them out successfully?

With the proper record of your team's activities, you can start to identify which actions are most important for results. This information is invaluable when you're deciding how to evaluate or coach your team.

### What to Take Away

A strategic management plan is the bedrock that keeps your team on track for fundraising success. Many managers are busy fundraisers themselves, but the time and effort you divert towards your management approach directly influences your team's ability to raise money efficiently and meet goals over the long-term.

To best support fundraising, we suggested developing your management strategy in six important areas.

- Use goal-setting to define focus for everyone
- Formalize a mentoring program to support professional growth
- Provide training opportunities that invest in your team
- Foster your team's sense of commitment by celebrating their successes
- Use strong tools that facilitate efficient fundraising
- Set officer goals and use benchmarking to regularly track their performance

If you have any questions about gift officer management best practices or tools, the team at Reeher is here to help. Shoot us an email at [info@reeher.com](mailto:info@reeher.com) or call us at **651-313-6000**. Which of the six management tips do you want to know more about? ☰

---

[CONTACT US](#)