

Development Learning Collaborative

COLLABORATIVE RESEARCH

The Development Learning Collaborative (DEV-LC) executes one major Collaborative Research project each year. Collaborative Research projects are foundational member-wide research studies with topics identified and prioritized by the entire membership. They focus on major trends and issues of long-term strategic importance using data sets or case studies drawn from across the membership and are used by members to examine national trends impacting all development offices in higher education.

Examples of Recently Completed and Upcoming Collaborative Research Initiatives

REPORT TITLE	BENEFIT TO MEMBERS
Success Factors for the High Performing Gift Officer	<ul style="list-style-type: none"> ■ Understand individual attributes and institutional practices that support higher productivity ■ Use high-performer profile to recruit and retain gift officers
Measuring Gift Officer Performance	<ul style="list-style-type: none"> ■ Benchmark expectations and performance outcomes for gift officers by role, tenure, and amount of administrative support
Transitioning Donors to Higher Gift Levels <ul style="list-style-type: none"> ■ Chapter 1: Characteristics of First-Time Major Gift Donors ■ Chapter 2: Effective Cultivation Strategies ■ Chapter 3: Donor Cultivation Scenarios 	<ul style="list-style-type: none"> ■ Use profiles of first-time major gift donors to improve prospect strategy, shape portfolios, and inform campaign planning
Managing Returns on Staffing and Budget Investments <ul style="list-style-type: none"> ■ Chapter 1: Analysis of Overall Staff and Budget Investments ■ Chapter 2: Staff Responsibilities and Organizational Structure of Service Areas ■ Chapter 3: Analysis of Investments in Fundraising Areas ■ Chapter 4: Case Examples of Effective Resource Investments 	<ul style="list-style-type: none"> ■ Compare investments in fundraising and services areas relative to a benchmark cohort to inform staff allocation and organizational structure ■ Assess return on investment in terms of dollar raised per gift officer and other productivity and efficiency metrics
Generating Big Ideas and Raising Mega-Gifts (Series of Reports to be Released Throughout 2009)	<ul style="list-style-type: none"> ■ Key roles and responsibilities for administrators and senior leaders to develop fundable big ideas ■ Timelines and steps for conducting big idea generation ■ Criteria and diagnostics to identify appropriate projects and prospects ■ Effective practices for cultivating and involving donors

"I can't think of a formal presentation we have done, whether it be to donors, the Board, the president, or faculty, in which we haven't used Eduventures data."

Executive Assistant to Senior Vice President for Development
Private University Located in the Northern U.S.

Examples of Recently Completed and Upcoming Collaborative Research Initiatives (cont.)

Success Factors for the High Performing Gift Officer

Understanding the factors that have the greatest impact on successful gift officer performance creates a framework for development organizations to focus recruitment and professional development investments. This research report sets the context for the high-performing gift officer by examining the differential in output between high- and low-performing gift officers. Through a survey of member institutions' gift officers, a model was developed to examine the relationship between individual-level attributes (e.g., education, experience, attitudinal variables) and institutional-level factors (e.g., training, management, support staff, prospect portfolio) with gift officer performance.

Measuring Gift Officer Performance

Measuring performance of development officers is challenging, due to the lengthy gift cultivation period, the intangible nature of relationship quality, and the ethical considerations associated with rewarding fundraisers based on performance. This research report benchmarks members' actual and target performance metrics for gift officers. A member survey identified the metrics, both individual and team-based, that member institutions are using, and how these metrics vary by position, school or unit, and experience level. The report also examines how goal-setting and compensation policies influence performance outcomes at member institutions.

Transitioning Donors to Higher Gift Levels

This study identifies the cultivation strategies and donor motivations that can accelerate donors most quickly to a higher gift category. The research, incorporating multiple sources of data, including profiles of approximately 1,300 donors, generates an integrated view of foreground and background touches and an understanding of the ways in which donor cultivation strategies need to vary by donor segment and type. Chapter 1 provides an overview of the demographics, giving history, and the overall cultivation timeline for different segments of first-time major gift donors.

Chapter 2 focuses on the blend of engagement strategies used with each donor segment (e.g., personal visits, event attendance, and volunteer roles, plus phone, mail, and e-mail contacts), as well as the timeline of cultivation. Chapter 3 features scenarios about donors' motivations for giving and diagnostic tools for gift officers to use when qualifying and cultivating first-time major gift prospects.

Managing Returns on Staffing and Budget Investments

Every development organization faces the question of how to determine appropriate staff and budget allocations in a way that maximizes returns for the institution. For the 2008 Collaborative Research initiative, the DEV-LC developed a data set across the membership of staffing levels and budget investments by functional and fundraising area. The study helps development organizations generate a dashboard of operational metrics to evaluate their resource allocations and supports efforts to identify effective ways of structuring and growing fundraising programs. The benchmarking survey also examines staff roles and responsibilities to understand the underlying causes of differences in resource allocations.

Generating Big Ideas and Raising Mega-Gifts

Mega-gifts transform institutions, launch campaigns, and generate new levels of fundraising expectations. Creating a fundable strategic vision and transformational ideas are essential for securing mega-gifts and propelling the institution forward. The 2009 DEV-LC Collaborative Research will provide members with tools and frameworks designed to help generate the ideas and successfully raise eight- and nine-figure gifts. Key outputs will include:

- *Key roles and responsibilities for administrators and senior leaders to develop fundable big ideas*
- *Timelines and steps for conducting big idea generation*
- *Criteria and diagnostics to identify appropriate projects and prospects*
- *Effective practices for cultivating and involving donors*

Managing Returns on Staffing and Budget Investments
Executive Summary of Chapter 1 - Analysis of Overall Staff and Budget Investments

This report is the first in a series of chapters to be published as part of the 2009 Development Learning Collaborative research agenda. These initial findings provide an aggregate look at staff and budget levels relative to the size and maturity of the fundraising program, as reflected in the dollars raised annually in the year 2007. The findings are designed to provide member institutions with insight and benchmarks in the scale, productivity, and organizational models of advancement organizations of different sizes.

Members can use this chapter to explore the following key questions:

1. How does our institution compare to others of similar size?
2. What investment and performance benchmarks should our development department target in order to achieve our growth goals?

Section	Metrics Analyzed	Page Reference
Executive Summary		
Scale of Operation	<ul style="list-style-type: none"> • Advancement Budget • Frontline Staff FTE • Investment Officers FTE • Investment Levels Relative to Alumni of Record and Number of Donors 	2
Productivity and Performance	<ul style="list-style-type: none"> • Dollars Raised per Budget Dollar • Dollars Raised per Total Staff FTE 	4
Organizational Models and Structures	<ul style="list-style-type: none"> • Organizational Model and Structure • Frontline Officers Percentage • Number of Non-Frontline Staff per Frontline Officer 	8
Applying the Findings: Consideration for Development Program Growth		11
		16

*Participating institutions' total dollars raised at points other than fiscal 2007 survey submitted to the Council for Aid to Education's Voluntary Support of Education study.

RESEARCH BRIEFS

Research briefs are shorter research initiatives developed by the DEV-LC research team to impart timely insight into emerging areas of interest for the entire membership and provide an overview of data and trends related to a targeted topic of interest. Research briefs are developed in response to collective interest expressed by the membership.

UPCOMING AND COMPLETED RESEARCH BRIEFS FOR 2009

REPORT TITLE	BENEFIT TO MEMBERS	TARGET REPORT RELEASE DATE
Gift Officer Productivity: Defining New Metrics	<ul style="list-style-type: none"> ■ Updates benchmarks and analysis offered in the 2007 collaborative report ■ Provides changing metrics, goals for new gift officers, and definitions of high performers 	Completed
Developing Prospect Strategy	<ul style="list-style-type: none"> ■ Offers tools and recommendations for developing individual prospect strategy ■ Provides effective solutions for discussing, setting, and tracking prospect strategies 	Summer 2009
Annual Giving Retention and Participation	<ul style="list-style-type: none"> ■ Highlights practices used by institutions for raising more unrestricted cash during the economic recession ■ Using FY09 data, benchmarks annual giving retention and performance ■ Offers constituent and segment benchmarks 	Fall 2009
Compensation Benchmarks: 2010 Update	<ul style="list-style-type: none"> ■ Offers compensation benchmarks for approximately 20 key roles within advancement ■ Will use FY10 salary data to supply current update 	Winter 2009/2010

CUSTOM ANALYSIS

Custom Analysis consists of targeted, member-specific research studies with topics identified and prioritized by individual members. The studies focus on strategic or operational issues specific to that member involving either primary or secondary research and use several possible methodologies such as benchmarking, analysis of members' in-house data and identification of best practices.

All past Custom Research Reports are made available to the entire membership, allowing members to benefit from research conducted on behalf of other member institutions. The Learning Collaborative currently has **over 100 Custom Research Reports** available to members in its research library.

“The report was helpful in that it not only confirmed many of the strategies we are following at Syracuse, but points out some things (particularly in the case study data) that we need to improve on. Altogether, this will give us some important data that we can reflect on with the Board over the next couple of days. Thanks again for your work on this.”

Brian C. Sischo

Associate Vice President for Development & Campaign Director

Syracuse University

SAMPLE CUSTOM RESEARCH REPORTS BY DEV-LC RESEARCH THEME

Donor Motivations, Cultivation and Stewardship

Annual Giving

- *Annual Giving Funding Models*
- *Leadership Annual Giving Societies: Bridging to Major Gifts*
- *Annual Fund: Motivating Young Alumni to Give*

Major and Principal Gifts

- *Principal Gifts Cultivation and Stewardship Practices*
- *Extreme Stewardship for High-Level Donors*
- *Student Aid Fundraising Initiatives*
- *Prospect Research: Factors and Models*

Staff Management and Productivity

- *Retaining Gifts Officers: Practices and Tools*
- *Gift Officer Job Design for Retention*
- *Rewarding Internal Collaboration in the Fundraising Process*

Campaign Planning & Management

- *Campaign Planning During Presidential Transitions*
- *Engaging Volunteers: Key Findings*
- *Advancement Communications in Public and Post-Campaign Phases*

Advancement Organization and Operations

- *Building a Robust Prospect Research Function*
- *Key Findings on Using a Foundation Model for Advancement*

- *Alumni Association Funding Models*
- *Advancement Management Reports*

MEMBER ROUNDTABLES

Member Roundtables are web teleconferences that convene the membership to discuss research findings, best practices, and implementation strategies. They allow members to speak directly with the DEV-LC research team, relevant experts and other member institutions in order to leverage the collective wisdom of the membership on specific topics. All Member Roundtables are recorded so member institutions can access them afterwards if they are unable to attend in person.

Examples of Past Member Roundtable Topics

- *Transitioning Donors to Higher Gift Levels: Key Findings*
- *Gift Tables as a Strategic Tool*
- *Post-Campaign Planning*
- *Managing Returns on Staffing and Budget Investments: Update on Key Findings*
- *Leadership Annual Giving Societies*
- *Campaign Communications*
- *International Fundraising*
- *Doing More with Less*
- *Student and Young Alumni Programs*
- *Instituting a Principal Gifts Program*
- *Raising Cash – Using Mini-Campaigns to Generate Momentum in Tough Times*

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