



# Building a High-Performing Major Gifts Team: More Fact, Less Fiction

In the past decade, the development field has experienced a dramatic increase in data-driven research. What has emerged is a new window into our work, made possible by a set of disruptive facts and realizations, many of which now challenge our previous beliefs. When it comes to major gifts, this new set of rules has firmly shaken our old ideas and challenged us to adopt new practices to optimize our efforts. We now can build high-performing major gifts teams based on fact, not fiction.



## 1. Gift Officer Activity



**FACT:** We now know that gift officers with more realistic, attainable, and strategic visit goals raise more money. Activity alone doesn't increase dollars. Strategic portfolio management and individualized goal-setting does.



**FICTION:** More visit activity from gift officers equals more dollars



## 2. Metrics



**FACT:** Some of the most helpful metrics in examining major gifts productivity are Close Rate and Percent of Solicited Dollars Closed. A very high or very low percentage for either of these metrics should generate a red flag—no one should be closing 100% of their gifts!



**FICTION:** When it comes to gift officer metrics, the bigger, the better.



## 3. Going it Alone



**FACT:** Partner up! Pairing gift officers with planned giving professionals, academic and practice leaders, board members and volunteers creates higher results than when gift officers cultivate and solicit on their own.



**FICTION:** Major Gifts Officers are lone wolves—most of their work should be done solo and without a partner.



## 4. Career Pathing



**FACT:** Many gift officers are ill-suited to management roles, and yet are often promoted without the needed support to ensure success. Further, taking high-performers and saddling them with management tasks inevitably tanks productivity and success. Instead, look for career growth opportunities involving exposure to boards, leaders, and top prospects, or special development projects.



**FICTION:** The best way to retain a high-performing gift officer is to make her a manager.



## 5. Portfolio Size



**FACT:** Gift officers are not great at portfolio management, and shouldn't have to be. Development managers have been dramatically reducing the size of portfolios to ensure gift officers can focus activity on key prospects in cultivation and solicitation stages—finding new ways to ensure a pipeline of qualified and stewarded prospects without spending gift officer time to do this work.



**FICTION:** A big portfolio allows gift officers to develop lots of relationships and ensure a healthy pipeline.

## DID YOU KNOW...

### 1 Gift Officer Activity

Despite goals often set at 120+, high-performing gift officers are often making only 80-100 visits a year (and soliciting ~25 major gifts).

### 2 Metrics

Close Rates of 50%-70% and Percent Solicited Dollar Value of 50%-80% are typical for high-performing gift officers.

### 3 Going it Alone

Gift officers are able to close more major gifts and for greater percentages of dollars when conducting asks and closes in partnership with board members, institutional leaders, and planned giving officers.

### 4 Career Pathing

Gift officers spending 80% or more of their time on frontline fundraising will have the greatest returns and highest productivity.

### 5 Portfolio Size

Major gifts portfolio sizes have reduced from what were national averages of over 160 prospects to averages closer to ~90 prospects.

## ✓ PUTTING THE FACTS INTO ACTION



Set visit goals individually and strategically based on the composition of a portfolio. Remember—the more attainable and realistic—the better the results!



Examine close rate and percent solicited dollar value closed for each gift officer. Remember, too low and too high are both red flags!



Encourage gift officers to make visits and solicit in partnership with others. Consider creating a metric to report on partnership activity.



Whether mentoring occurs in-house, is manager-driven, or delivered by an outside coaching partner, invest in individual coaching for your frontline team and don't over-invest in low performers at the expense of rising stars.



Review portfolios each year. Are the Top 50 prospects closest to solicitation and in need of focused cultivation identified?

## ABOUT GRAHAM-PELTON CONSULTING

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