

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.