



EARLY CAREER SUCCESS FACTORS

for Major Gift Fundraisers

Research Summary

Prepared by Advancement Resources, February 2020





EXECUTIVE SUMMARY

Every new major gift officer represents a tremendous investment on the part of their organization—to train, equip, support, and motivate them to perform their job at the highest levels, represent the organization well, and secure major contributions to support the organization's important mission. Yet fundraiser turnover rates are high. Performance in early career is key to reaping the best possible return on the investment organizations make in their teams. This report provides an overview of the results of Advancement Resources' research into early career fundraiser success.

What are the actions, habits, skills, and knowledge areas essential to the success of major gift fundraisers as they embark upon their careers? What would most help them contribute to their organization's important mission? And what is currently standing in their way? These questions are the central pillars of this research effort, which was comprised of interviews, focus groups, and survey responses from more than 150 professional fundraisers.

KEY FINDINGS:

- Skills ratings overall were **low**—56.7 of 100, on average—revealing a **lack of confidence** felt both by early career fundraisers in themselves, and in their more tenured colleagues' perceptions of them.
- **Handling difficult conversations with donors** and **securing meetings by phone** were rated as the two most challenging skills.
- **Handling difficult conversations with donors** and **running an effective and efficient donor meeting** were rated as the two most important skills for new fundraisers to improve.
- Qualitative research revealed that **tenacity, professionalism, and curiosity** were three of the most critical qualities for professional fundraisers.



Fundraising Skills

Survey respondents rated various fundraising skills that had been identified in earlier qualitative research as essential to early career success. Early career fundraisers were prompted to rate their own confidence in each skill, while more experienced fundraisers assessed how challenging each skill is for their early career colleagues and direct reports.

The following chart shows the skills ordered from most confidence (least challenging) to least confidence (most challenging).

<i>Fundraising Skill</i>	<i>Score out of 100</i>
Adhering to appropriate etiquette for formal events	75.8
Conveying a professional image	75.2
Using email to secure a donor meeting	69.6
Interacting professionally with high-net-worth individuals	60.4
Adapting their styles to work with those of other generations	59.8
Understanding their institution's culture and politics	58.8
Collaborating with internal stakeholders	57.6
Understanding perspectives of internal stakeholders	57.0
Running an effective and efficient donor meeting	56.6
Approaching professional challenges from multiple angles	51.6
Pivoting from inappropriate to appropriate subjects in donor conversations	51.6
Coping with rejection	49.6
Discovering reasons behind donor objections and/or rejection	49.2
Asking for a major contribution	48.2
Using the phone to secure a donor meeting	43.4
Handling difficult conversations with donors	43.4

Notably, there is a wide disparity between **Using email to secure a donor meeting** and **Using the phone to secure a donor meeting**, with early career fundraisers expressing far more confidence in their skills communicating via email than via phone. In fact, **Using the phone to secure a meeting** was tied with **Handling difficult conversations with donors** as the lowest rated skill. In comments, respondents alluded to donor communication preferences, unrealistic expectations, and fear as obstacles to success in this area.

When asked to suggest additional skills necessary for early career success, survey respondents named the following areas with some frequency:

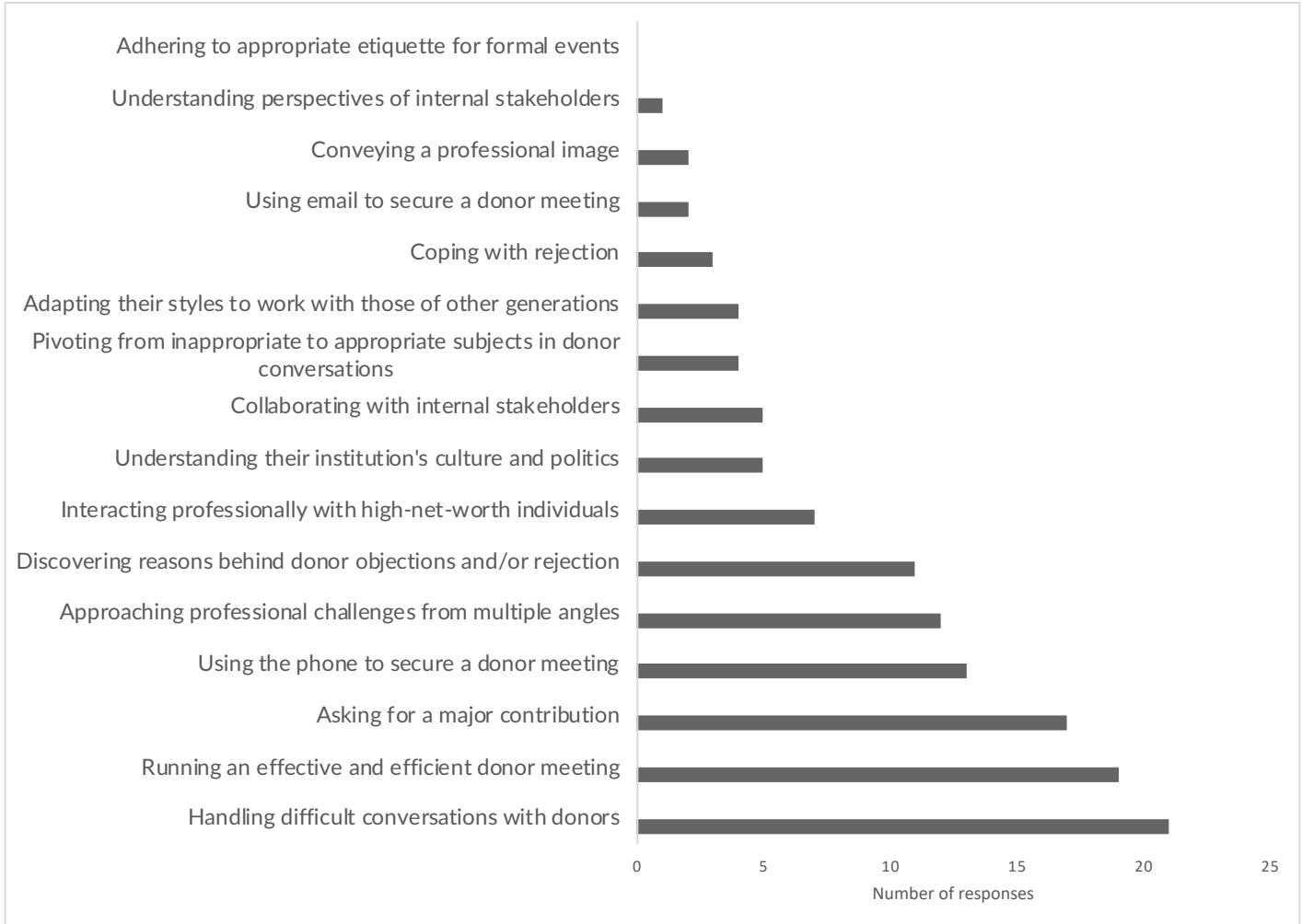
- Ability to converse about a variety of topics of interest to donors
- Writing/written communication abilities
- Patience and understanding of long-term strategic planning
- Ability to work effectively with diverse donors (gender, sexuality, ethnicity, etc.)
- Gratitude—toward donors and others
- Ability to maintain a professional distance in donor relationships
- Authenticity or being genuine
- Understanding and exhibiting professional ethics
- Discovering donors' passions

The numerical **average of all the skills is 56.7**, which falls just above the mid-point on the five-point rating scale used for the survey. When viewed as "grades" on a scale from 1 to 100, these scores demonstrate a pressing need for better training and onboarding of new fundraisers.



Skills Most Important to Improve

Survey respondents were asked to choose one skill as most important to improve. The chart below displays their responses.



The skill rated lowest in the confidence was the same as that rated as most important to improve—**Handling difficult conversations with donors**. **Asking for a major contribution** and **Using the phone to secure a meeting** also rate in the top five for both lists, revealing their importance and value as an area of focus for organizations as they onboard early career fundraisers.

Approaching professional challenges from multiple angles and **Running an effective and efficient donor meeting** rounded out the top five most important skills. Survey respondents commented on the importance of each of these qualities; several notable responses appear on page 4 of this report.



Advice for Early Career Fundraisers

Survey respondents were prompted to provide advice for early career fundraisers on the most important practices and skills necessary for their success. The quotations below are excerpted from the survey responses.

Fundraising is a partnership. If you don't collaborate strongly with internal stakeholders, you will not be successful.

While getting in the room is challenging enough, it is critical to keep the conversation focused on the prospect and their passions, rather than our own interests.

Nothing happens until you get the meeting... I find if I can get someone on the phone and they hear my warm and friendly tone, the relationship has already begun, and it bodes well for a great meeting.

We can all be too quick to want to move on to the "next" prospect after a "no"—but often a "no" may not be "no" but instead "not now." You have to dig a bit to determine that. The reasons may be part of a larger pattern of thinking about our organization in the community.

Newer professionals can be uncomfortable with asking direct questions and "pushing back" in a respectful, professional way. It feels awkward but can be very rewarding.

Rejection is hard at the beginning of a fundraising career. It can be taken personally, and it is hard to get past it toward making progress, both with that particular prospect and with others in the future.

Understand that donors have different backgrounds and experiences than most fundraisers and resist the urge to identify with them personally.

I think gratitude is essential—does the gift officer live and breathe with purpose and does that purpose include demonstrating gratitude to donors, to those who will give, and a genuine spirit of thankfulness? If so, they will continue to soar.

I am learning how critical it is to be a good colleague to my peers in development administration. I try to make sure the admin I am working with gets to feel the excitement of that gift we just processed, and I let them know what the funding did and the difference it made.

Passion for the mission of the institutions you represent is paramount to all other traits and is difficult to learn or fake.



Tenacity, Professionalism, and Curiosity

Research interviews and focus group conversations revealed several key qualities that are present in those fundraisers who experience early career success. We have categorized and defined these qualities as tenacity, professionalism, and curiosity. Survey respondents reacted to questions about these qualities; quotations from their responses are included below.

Tenacity has also been described as persistence or grit. New fundraisers should be prepared to encounter rejection, but not interpret rejection as failure. Re-framing the setbacks that can occur in donor engagement as normal, often uncontrollable, and possibly frequent can help the new fundraiser put their work into an appropriate perspective. Similarly, they should approach their work with an eye for the future and an understanding of long-term donor strategy that enables them to patiently await the right opportunity for the right donor at the right moment—which produces far greater results than hurrying to close loyalty-based gifts that are far below donors' capacity and are not meaningful to them.

Being told "no" or "not yet" by a donor over and over can be discouraging. If you stick with it and keep engaging the donor, you may have success; if you give up, you absolutely will not. I cultivated a donor for 7 years and ended up closing a \$24M gift thanks to my tenacity.

When beginning a position, you are eager to showcase your work. It is important to acknowledge that value is placed in the work you put in and not necessarily the immediate results when you are beginning your career. That can be a hard mental shift.

The idea of impression management through **professionalism** has also surfaced repeatedly in research. This quality involves representing the organization and themselves well through etiquette, personal appearance, ethics, and by appropriately framing the donor relationship. Survey responses on this topic were wide-ranging, with some fundraisers observing that this was not a high priority or challenge for early career fundraisers, and others attributing it as the differentiator between success and failure in early career.

Different cultures and environments have slightly different forms of professionalism, but the common traits are honesty, respect, and commitment.

Most of us are very good at making friends and building relationships. But the focus is on raising philanthropic support for our institution, not making friends, and if we ever lose sight of professional duties, we fail not only our organization but our donors, as well.

Great fundraisers have a habit of asking questions rather than making assumptions—the quality of **curiosity**. New fundraisers should be curious toward their donors; this can look like asking the right questions in meetings (and listening to the answers), noticing small things in the environment that can be clues for engagement, and digging deeper to learn why a donor said “no” to an opportunity. They should also be curious toward internal partners, particularly academic leaders, in order to partner appropriately.

To encourage your own curiosity with donors, I think it helps to operate with a single premise: people love to talk about themselves. Put yourself in the donors shoes, especially if it's your first meeting: they think you're coming to ask for a gift. Instead, let them be the expert on a topic no one else knows: themselves.

Asking questions is the most important part of our job. Asking a [leader] what their vision is; asking a donor what their passion is; asking a manager why we have not changed an antiquated process. These are all questions born from curiosity that will lead to success.



About Advancement Resources

Advancement Resources is a world leader in research-based professional education and breakthrough thinking in philanthropy.

We serve as a strategic partner for nonprofit organizations, academic institutions, healthcare organizations, and academic medical institutions seeking to create a culture of philanthropy by engaging a broad number of key stakeholders.

For two decades, we've consistently conducted the philanthropy field's most extensive research into donor motivation and optimizing opportunities in philanthropy. This international research provides the basis for Advancement Resources' comprehensive array of services to assist organizations with seizing the tremendous opportunity in philanthropy today.