



EXECUTIVE SUMMARY

Philanthropy Leadership Climate Survey

6 Tactics to Improve Development Team Retention

Research, Design, and Facilitation by:





In 2013 a report called *The Underdeveloped—A National Study of Challenges Facing Nonprofit Fundraising*¹ revealed that 50% of development directors anticipated leaving their organization within two years. A 2019 study by the AFP and Chronicle of Philanthropy² revealed that this alarming statistic continues to hold true for not just development directors, but the whole development team.

In fundraising, rapid turnover has been a long-standing problem since long before most of us knew what a coronavirus was—in a post-pandemic world this problem is even more pronounced as “The Great Resignation” trend has impacted retention across all industries. At the start of 2023, Advancement Resources conducted a survey with 119 respondents to check the pulse of philanthropy leadership today and discover insights into improving retention to push back against this perennial challenge.

Not surprisingly, our numbers found that retention is as big of a problem as ever. 32% of respondents are very likely to leave their organization within two years and an additional 21% are somewhat likely to leave. In order to find actionable tactics to address retention (beyond providing higher salaries and flexible work environments) the *Philanthropy Leadership Climate Survey* was constructed to capture a large amount of information per respondent, revealing

patterns that our field has not had insights into before. The survey featured 54 questions and separate branches for team members and team leaders to approach the problem from both perspectives.

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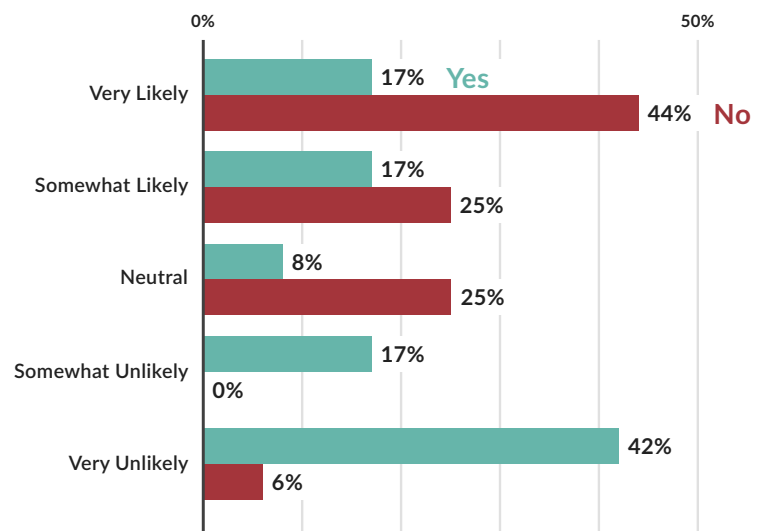
Through the quantitative and qualitative insights provided by the in-depth survey and follow-up interviews, six actionable tactics have emerged as the best practice approaches to retain development team members.

1 Jeanne Bell & Marla Cornelius “The Underdeveloped—A National Study of Challenges Facing Nonprofit Fundraising” <https://www.compasspoint.org/node/463/done?sid=28318&token=22f7e0f0cad2a1db89c08ce240b576b8>

2 The Chronicle of Philanthropy’s survey of fundraiser job satisfaction, in partnership with the Association of Fundraising Professionals, was conducted online in May and June by Harris Insights & Analytics, through the Harris Poll. <https://www.philanthropy.com/package/why-fundraisers-are-fed-up>



Responses to “How likely are you to leave your current institution in the next two years?” split by Yes/No answers to the question “Do you feel you get enough coaching/mentoring/1-on-1 support?”



1 Check that your team members are happy with the level of 1-on-1 support they are receiving.

The survey data found that the factor that has the most outsized impact on how likely a team member is to leave is whether they feel they get enough 1-on-1 support. Combining the “very likely” and “somewhat likely” scores in the chart shows that 69% of those who don’t feel they get enough 1-on-1 support are at least somewhat likely to leave in two years—compared to only 34% of those who do feel they get enough 1-on-1 support.

This data suggests that providing enough 1-on-1 support can cut your team members’ likelihood of leaving in half. Looking at the other end of the chart—only 6% of those who feel they don’t get

enough support are “very unlikely” to leave an organization versus 42% of those who feel they do get enough support. That’s a 7x difference!

This data suggests external coaching support could be highly valuable and prove extremely cost effective over the long-term if you do not have enough time/capacity to provide more 1-on-1 support internally.

2 Formally recognize and appreciate soft skills and deeper meaning.

“Our metrics are money and yet our task is relationship engagement.”

Many of the frustrations that respondents felt about performance evaluations boiled down to the core issue of wanting to be evaluated not just on meeting metrics but on their soft skills, including such things as being a mentor to others and their overall value to the entire advancement team.

“Recognize my expertise and judgment and ability to coach and guide coworkers whom I’m not responsible for managing.”

Many people work in development because it is deeply meaningful for them. Finding ways to celebrate and appreciate their work can go a long way.

“For me, the question is around the organization’s willingness to value relationship development and raise money in meaningful ways.”



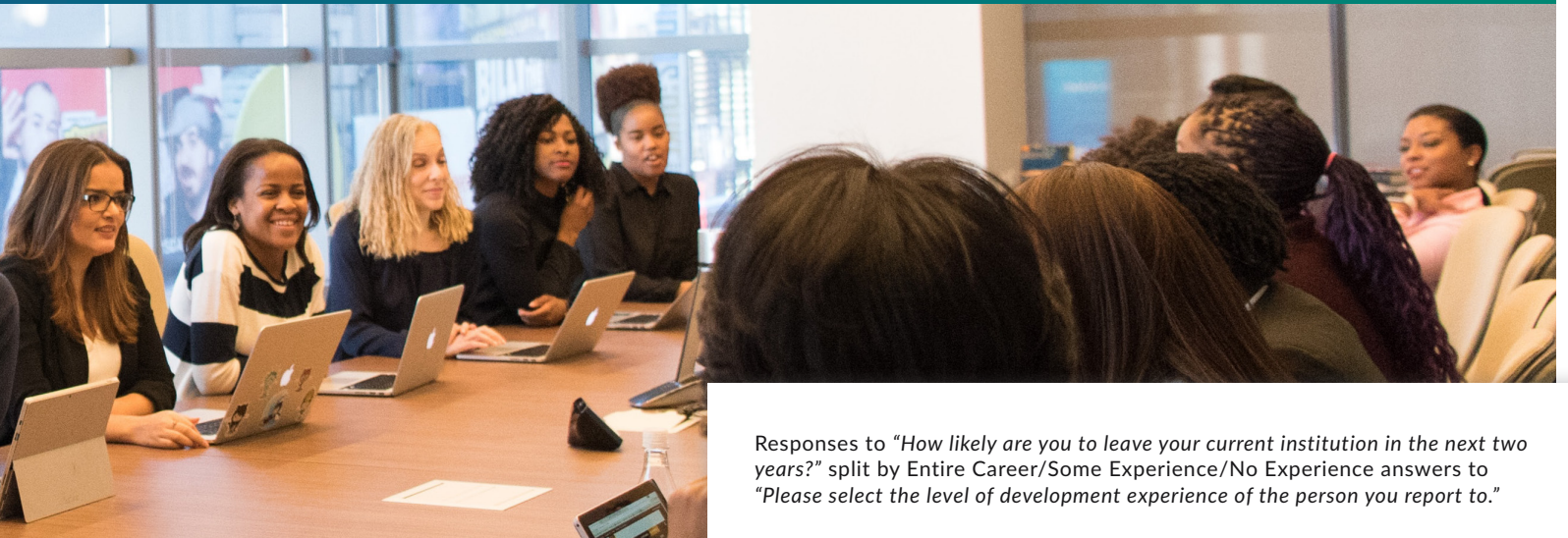
3 Conduct reviews at least annually, provide informal feedback at least weekly, and share expectations about what is being evaluated.

The survey found that the most common frequency of formal review is annually (52%), and the most common frequency of informal feedback is weekly (64%). Anything less is behind the curve.

Qualitative insights about evaluations revealed that in addition to frequency of feedback, the capricious nature of some institutions’ approach to evaluation(s) is a source of considerable stress:

“Our Foundation changed the rubric for performance two months before the evaluation time. We were evaluated by a measuring stick that we didn’t know existed.”





4 Ensure your team members report to someone who has development experience.

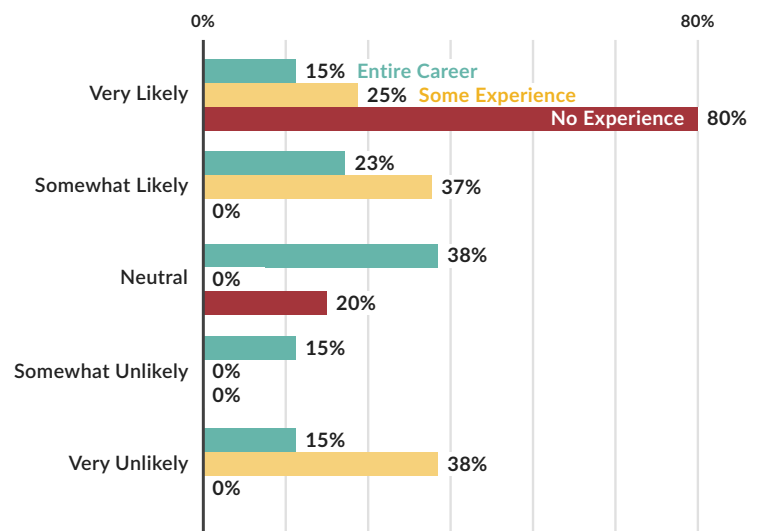
14% of respondents to the survey report to managers with no development experience, and 29% report to managers with only some. The data shows this has an outsized negative effect on team members' likelihood of leaving.

Qualitative insights from the research made clear the frustrations that some fundraisers have when trying to navigate situations where they are being managed by someone with less development expertise:

"Sometimes our tried & true best practices based on decades of learning really are better than your rocket science idea of a lemonade stand or to throw another fundraising event."

"Trust my experience, training, and advice in development."

Responses to "How likely are you to leave your current institution in the next two years?" split by Entire Career/Some Experience/No Experience answers to "Please select the level of development experience of the person you report to."



5 *Implement a consistent management philosophy.*

76% of the leaders surveyed have not been trained to use a clearly defined management philosophy. When asked to describe their management philosophy, responses featured a wide range of approaches including:

- Radical Candor
- *SLII* by Ken Blanchard
- Relational Leadership
- Authentic Transformational Leadership
- Management Center's *MOCHA* for Managers
- Stephen Covey's *The 7 Habits of Highly Effective People*

Based on responses, there is no dominant best-practice approach to management philosophy in advancement.

“Do you know and understand the management philosophy at your institution?”

From the perspective of those being managed, feedback revealed that it is not so much about which philosophy is chosen, but about having a coherent management philosophy at all. In addition to many simple responses of “no” to the question “Do you know and understand the management philosophy at your institution?” we received many comments like this:

“Other than being metrics-driven, I’m not sure I could articulate what our management philosophy is.”



It is important to note that is not good enough to merely have a management philosophy. Consistent and equitable application is necessary.

“There is a significant difference between the stated philosophy and the daily leadership walk.”

“I have heard the philosophy, yet I observe that the reality is more entrepreneurial and chaotic. I feel that the philosophy would work if it were implemented, but I feel disrespected by the reality.”

“I think it’s a line that sounds good and it looks good to the community but isn’t truly followed.”

6 Support team leaders with more training and help them balance their workloads.

The problems facing team leaders should come as no surprise. The survey confirmed that juggling priorities is a big issue for 52% of leaders, especially for those with a portfolio of over 50 contacts.

Not having enough time, worrying about retention, and balancing priorities were by far the main challenges, with all interviewees facing some combination of one or more of these challenges. When asked the question, “How could your institute better support you as a manager?”, responses were overwhelmingly centered around training on how to lead, specifically on training new managers.

“Training, support, focused approaches around initiatives. Less reactive and more strategic.”

“Provide leadership training on managing staff, developing strategic goals, creating and tracking work plans.”

This data suggests that like 1-on-1 coaching for team members, management training for team leaders could also be highly valuable and prove extremely cost effective over the long-term.

Sign up now for more insights from us in the coming months. We will release a comprehensive report detailing all of the quantitative data collected, and additional quotes and insights about leadership in philanthropy including information about portfolio sizes, internal collaboration on major gifts, recognition of securing gifts, length of tenure of managers, and more.



Sign up now.


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