



Philanthropy Leadership Survey Findings

About the Survey

- 119 Respondents
- 2 Sections
 - Team Members
 - Leaders
- Titles ranged from Development Officers to Advancement VPs and Presidents
- 54 Questions (Approx. 5000 data points)
- Average time in current role: 4.4 years
- 78% have over 10 years of development experience



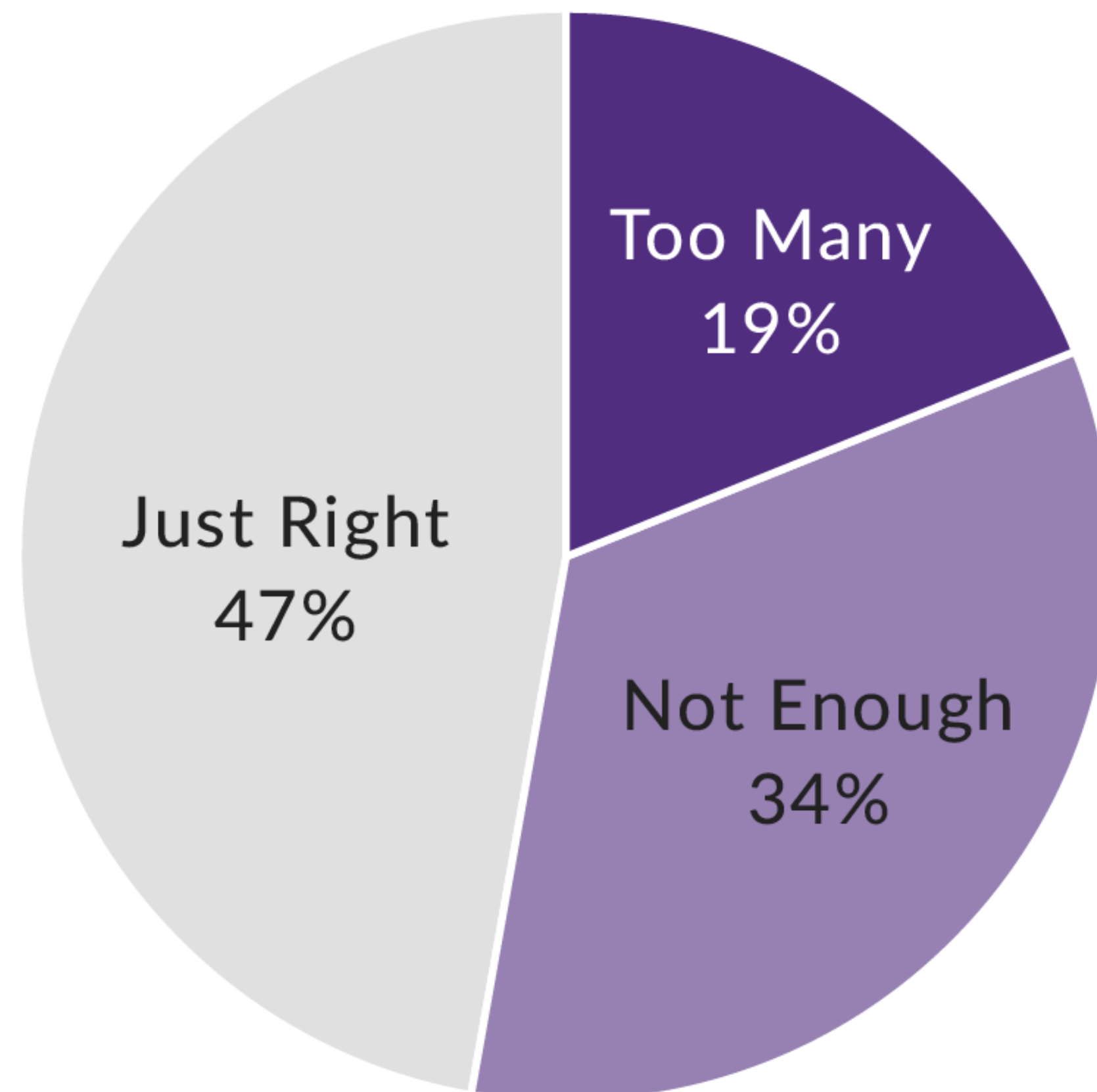
SECTION 1

Team Members

Team Members: Portfolios

- Average portfolio size: 125
- Range from 3 to 600
- Overall, 75% met or exceeded their goals
- 47% feel that the number of contacts they have is “Just Right”

Team Members: Portfolios



Median Portfolio Sizes:

Too Many = 145

Just Right = 117

Not Enough = 80

Met or Exceeded Goals:

Too Many = 83%

Just Right = 85%

Not Enough = 56%

“Ideally my portfolio would be smaller, but the bigger issue is that it runs the gamut from *won't take my calls, dead weight* to *highly engaged*.”



Team Members: Satisfaction

- 59% have reported to their current manager for less than 12 months
- Median of 3 managers in the last 5 years
- 17% of their managers have no development experience
- 43% are either very or somewhat dissatisfied with their manager
- 42% are either very or somewhat dissatisfied with the way their performance is evaluated



“Let me do my job.”

“Listen to the team.”

“Do what you say you will do.”

“Be honest and transparent.”

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

Team Members: Stats

- 57% feel they don't get enough 1-on-1 support
- Only 25% prefer internal coaching
- 32% very likely to leave in next 2 years

Top Reasons For Leaving

1. Looking for a higher salary
2. Seeking a better management relationship
3. Seeking job growth and career advancement
4. Wanting to feel valued
5. Feeling uninspired
6. Looking to live somewhere else
7. Changing careers out of development
8. Looking for more recognition

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

“It is hard to feel a particular way about something that the leadership is unable, or unwilling, to properly articulate.”

Seeing What Isn't There

- There is no correlation between unhappiness with their portfolio and likelihood of leaving, or dissatisfaction with their manager.



SECTION 2

Leaders

Leaders: Facts


- Median of 6 direct reports
- 52% of managers also have a portfolio of more than 50
- Most common frequency of formal review is annually (52%)
- Most common frequency informal feedback is weekly (64%)
- 17% are very or somewhat dissatisfied with the level of 1-on-1 support they provide (compared to 57% of team members)
- 25% are very or somewhat dissatisfied with the way their team members are evaluated (compared to 42% of team members)

“Balancing the most important role, which is serving as a leader, coach, and mentor with all the gazillion things on my plate as a leader.”



Leaders: Management Philosophy

- 76% of all leaders have not been trained to use a clearly defined management philosophy
- Large variety of different management philosophies e.g.
 - 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*



“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.”



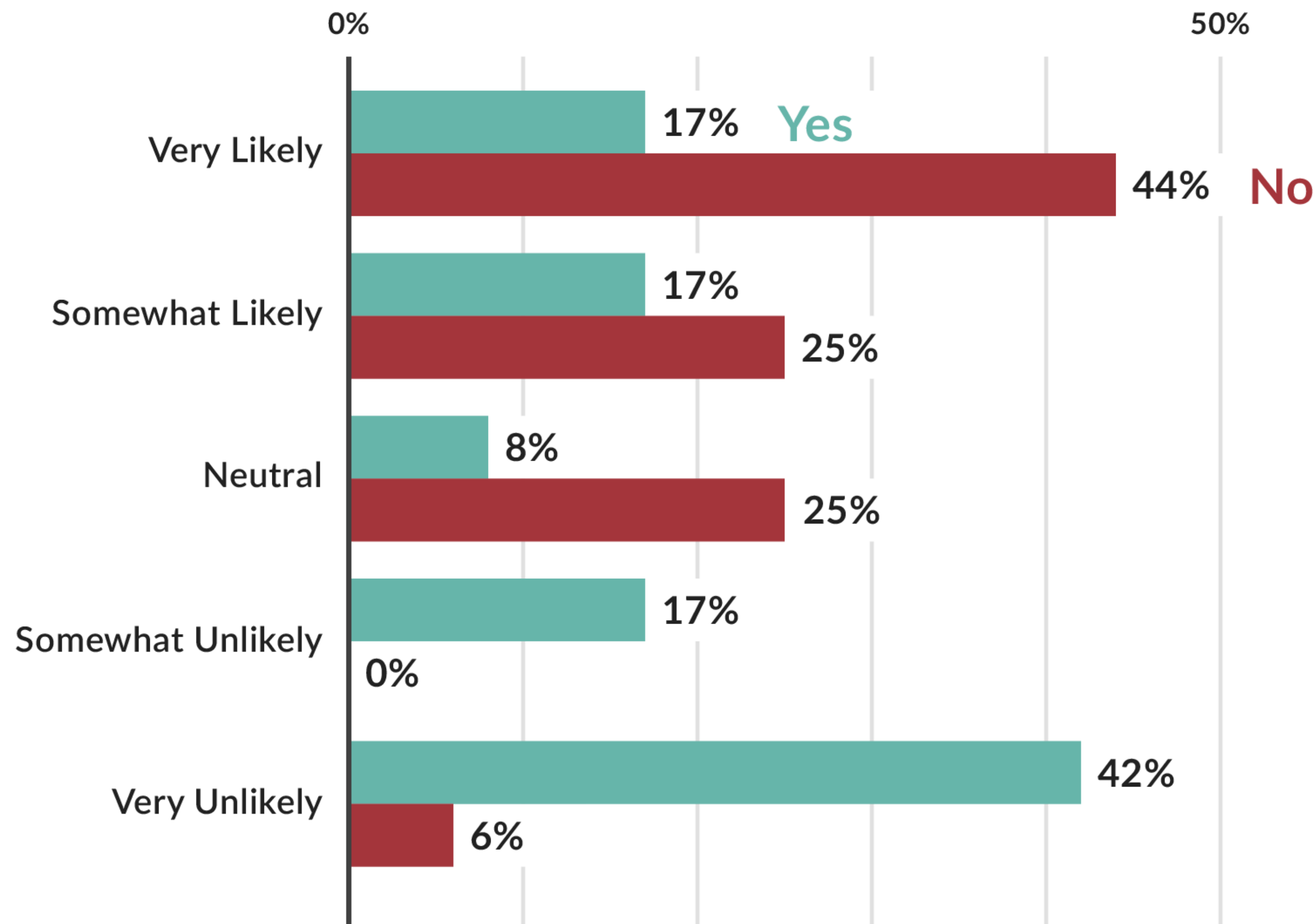
SECTION 3

Discussions, Tools, & Recommendations

Discussion—What are your takeaways?

- Retention is as big of a problem as ever
- There's a disconnect between what leaders and team members think about 1-on-1 coaching and performance evaluations
- Time and lack of training are the biggest stressors for leaders
- There is no best practice for leading—what should it look like?

Takeaways—What is Working



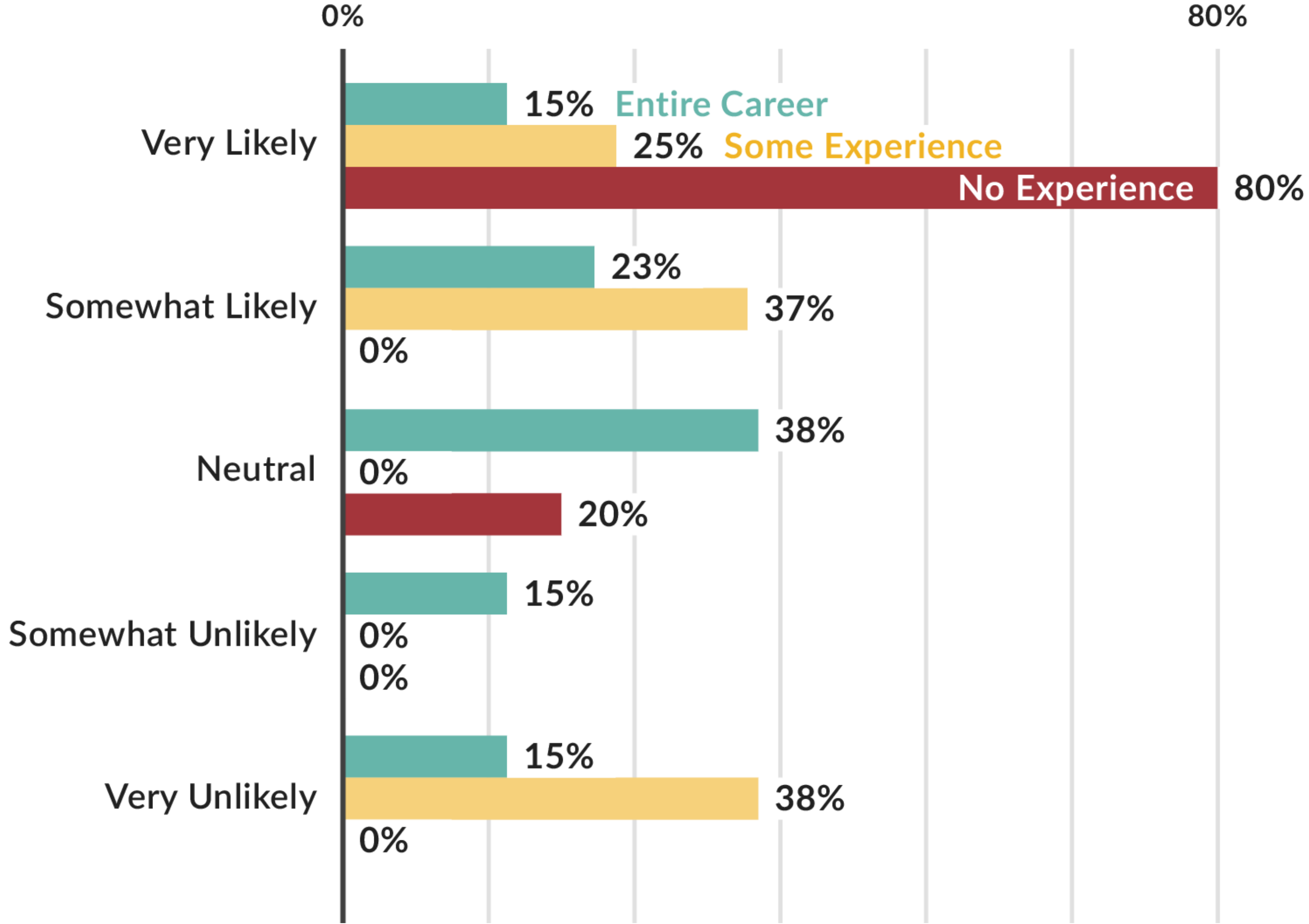
Likelihood of Team Member leaving compared with:

“Do you feel you get enough coaching/ mentoring/ 1-on-1 support?”

Takeaways—What is Working

Likelihood of Team Member leaving compared with:

Their manager's development experience.



Recommendations

- Adopt a values-based approach
- Spend more time 1-on-1, either directly or through external coaching
- Have weekly informal meetings and annual performance reviews
- Ensure managers have some development experience
- Include more recognition of soft skills in performance evaluations
- Use training to turn great fundraisers into great managers

Ongoing Research

Please visit: <https://s.alchemer.com/s3/01ffacf023ee>
or scan the QR code below.

