

# How to Maintain Donor Relationships During Staff Transitions

A GUIDE FOR NONPROFITS





## Introduction: Staffing Challenges Facing Nonprofits

As a nonprofit organization, your donors are the lifeblood of your mission. Without their financial support, your organization can't make the impact you desire. However, maintaining donor relationships can be a challenge, especially during times of staff turnover—one of the biggest challenges facing nonprofits today. When a key staff member responsible for donor relationships retires or moves on to another opportunity, it can put donor relationships at risk and, in turn, your fundraising efforts.

Fundraising staff have always been highly mobile, making job changes based upon mission, salary, and flexible work environments. A thin applicant field and lean budgets have added to the current staffing challenges. Hiring and training new staff members can be expensive and time-consuming for nonprofits.

A “great resignation” has occurred in the U.S. over the past few years, affecting many professions, including fundraising.

- **According to a recent EAB (formerly Education Advisory Board) survey, higher education is experiencing a 14 percent vacancy rate**
- **Fundraising staff are the most likely to leave their positions among advancement departments, accounting for up to 50% of departures.**
- **Job postings for advancement staff increased by 40% from 2017 to 2022.**

The great resignation, coupled with Boomer retirements, is challenging development departments to continue building relationships and securing major philanthropic investments.

**Your people are your greatest asset. Staff transitions mean you will need to be flexible and creative. In this e-book, we will share some thoughts about how to make the most of staff time and ensure your organization maintains strong relationships with your donors, even during times of staff turnover.**

## JOB TENURE OF FUNDRAISERS

**3.6  
YEARS**

CURRENT MEAN JOB TENURE  
(MEDIAN = 2 YEARS)

AND

**3.9  
YEARS**

MEAN TENURE ACROSS  
FUNDRAISING JOBS  
(MEDIAN = 3 YEARS)



**20%** INTENDED  
TO LEAVE THEIR  
ORGANIZATION

AND



**7%** INTENDED TO  
LEAVE FUNDRAISING  
WITHIN THE NEXT YEAR



OF THE TESTED VARIABLES,

**SALARY**

CONSISTENTLY HAD THE  
LARGEST EFFECTS AND WAS  
THE MOST SIGNIFICANT.

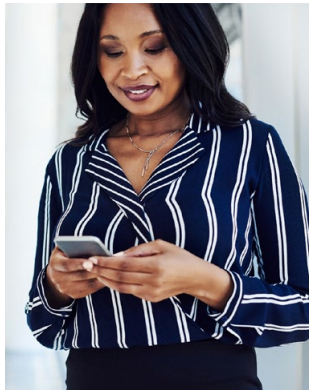
*From: Intention and Job Tenure of U.S. Fundraisers,  
Journal of Philanthropy and Marketing, 2022*

## Keep Donors Engaged

Keeping donors engaged is essential for maintaining donor relationships and can be especially challenging if your organization is understaffed. Relieve some of the demands on front-line fundraising staff by exploring new ways of keeping donors engaged.

This can be achieved by:

- **Identifying other team members to connect with your donors:** Let donors see the impact of their gifts from new perspectives via direct service staff, faculty, physicians, etc. As an extra touch between your conversations, enlist board members and other key volunteers to touch base with donors or prospects they may know.
- **Sending regular updates:** Donors should be kept updated on your organization's progress and impact. Use technology to provide additional contact to supplement your personal outreach. There are multiple platforms that make it easier than ever and very effective to share updates through newsletters, impact reports, short "day in the life" videos, etc. Technology can also help you personalize communication according to their preferences. They may prefer phone calls, emails, texts, in-person meetings, or a combination.
- **Providing new opportunities to engage:** Donors should be provided with opportunities to engage with your organization beyond financial contributions. This can include volunteering, attending events, participating in advocacy efforts, or receiving personalized reports on the impact of their donations.



Donors who feel appreciated and valued are more likely to continue giving to your organization over time. By keeping them engaged, you show your

donors that their contributions are making a difference and are appreciated. Creating relationships with multiple team members deepens your donor relationships and maximizes the time major gift officers have to commit to cultivation and solicitation.



### PRO TIP



Download our tip sheet to learn more about engaging board members in fundraising.



## Help New Staff Members Build Relationships

Your organization will need to create a plan for transitioning donor relationships during changes in staff. This plan should include a strategy for cross-training staff members and documenting donor interactions and preferences to ensure that institutional knowledge such as donor histories, contact information, donation records, personal interests, and donor preferences are not lost.

**Share information:** Update and maintain the donor database with pertinent information about each donor—and train new employees quickly on how to enter important visit details into the database. Knowing the donor's background will make the transition to a new gift officer go much more smoothly for everyone.

**Review portfolios:** When new gift officers come on board, the time is right to review your portfolios and decide how to best redistribute donor assignments. It is best practice to regularly evaluate donor portfolios, and that is especially true at the time of staff transitions. Don't automatically give a new staff member an existing portfolio. Think through relationships. Do the names still need to be managed? Who is the best contact for this relationship?

**Make introductions:** Introduce new gift officers to donors so they can begin to build relationships as soon as possible. It is especially important to prioritize your key donors during staff transitions. Ensure that they receive personalized attention and communication to maintain their support and engagement.



## Streamline and Customize Portfolios

Streamlining and customizing portfolios is essential for maximizing major gift officers' time and resources, especially when your department is short-staffed. You will need to develop or update a portfolio management process that is efficient, flexible, and data-driven.

This process can include identifying top prospects based on giving history, engagement patterns, and other factors, as well as developing customized engagement strategies for each donor. Regular review and updating of portfolios will ensure that they reflect donors' changing interests and giving patterns.

Consider:

### What staff members should have a portfolio?

Should your president/CEO have one—or should it be managed by a staff member? This is an important distinction, and each situation will be a little different. It is important that staff members who are assigned a portfolio make the time to build donor relationships. Clearly assess the anticipated time commitments and shift other duties if needed to accommodate.

### Which prospects should be in portfolios?

Decide which individuals in your database could make a gift in 24 – 30 months and work with those. For others, find another way to actively cultivate and grow their engagement with your organization. Define what amount constitutes a major gift for your organization.

### Are there new prospects that should be added to portfolios?

Consider donors' connections to your organization as well as their capacity. Match engagement data with giving history to uncover passionate supporters of your organization who, with further cultivation, could grow in their philanthropic support.

### What is an ideal portfolio size?

Today, an optimal portfolio size is 75-100 donors; less for staff who have multiple other responsibilities, especially those in leadership roles. You must regularly review portfolios, ask questions, and be willing to adjust by moving donors in and out of portfolios based on an objective measurement of their gift giving horizon and capacity.

### What is the best fit?

The prospects in each portfolio must fit each major gift officer—consider skill sets, personalities, and geography. Once prospects are assigned, ensure that portfolios are balanced in terms of number of donors in each phase of the donor development cycle. New team members may be assigned more discovery prospects and less solicitation, for example.



**PROTIP**



Explore more tips for building an effective, systematic major gift program with this downloadable tip sheet.



## Build a Stewardship Portfolio

As your staff works in close partnership to continually update and monitor portfolios, consider creating a new model that will move donors who are primarily in stewardship into a separate stewardship portfolio. This is a great way to maximize gift officer time by engaging other staff members to connect with these generous donors. The assigned staff will monitor this list and develop a system using the database to ensure touchpoints happen throughout the year, such as invites to special events, personal outreach from a gift officer with updates, etc.

Develop a process to ensure these individuals continue to receive these types of touchpoints three or four times a year. Also make sure the list does not become overwhelming to manage by establishing a manageable goal for the number of donors in the stewardship portfolio.

## Focus on Your Best Prospects

Ensure your major gift officers can be effective by giving them smaller, more focused portfolios that maximize their time and allow them to build deeper relationships with donors. That extra time fosters authentic connections with donors that will prove to be favorable in the long run.

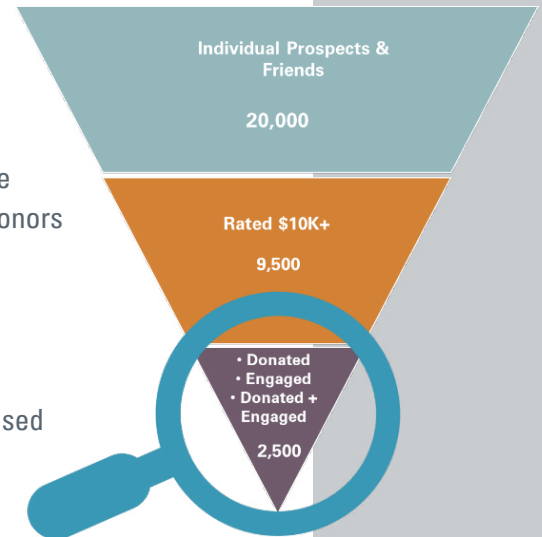
Data is an essential tool for identifying your most promising prospects to help you make decisions and develop customized engagement strategies. Your database has a wealth of information you can use to identify donors who are most likely to give. Your data can also be used to track engagement and monitor donor activity, allowing you to nimbly adjust strategies as needed.

JGA developed Acuity® to bring together key data sets in an easy-to-digest format that helps you determine where to focus your team's efforts. This user-friendly format blends electronic screening of your database, donor history, and engagement factors in one place.

Acuity identifies your strongest donors in terms of giving capacity and engagement. JGA takes the electronic screening from our partner DonorSearch and runs the records against an additional set of variables that consider recent giving and engagement, honing the list further. For some of our clients, as much as 60 percent of the list are not currently under management in their gift officer portfolios. We pair the results with experienced guidance to help you structure an efficient and effective prospect management plan you can implement quickly. With this key information, you can then determine your strategy with each donor, because you know them best.

You can use Acuity to:

- **reshape your portfolios**
- **prioritize donor contact**
- **rethink staffing/donor coverage.**



**PROTIP**

**Watch the video to learn how to uncover up to 60% more donors hidden in your database.**



## Continue to Engage Individuals with Personalized Messaging

As you streamline your portfolios, there will be many prospects you want to continue to engage. Develop a strong engagement strategy to help you cultivate those donors. These may be younger donors who are ascending through their professional lifecycle and will likely become major donors in the future, prospective donors who are still learning more about your organization, or individuals who have not been personally engaged in the past.

The strategy used to interact with these individuals should be personalized to them, both in message and delivery method. Technology can be extremely helpful in determining what messaging will resonate with each donor and even help you automate much of the communication, freeing up staff member time.



### PRO TIP

To learn more about enhancing your donor communication, email [lee@jgacounsel.com](mailto:lee@jgacounsel.com).

JGA has partnered to develop a unique service, which utilizes targeted personality profiles for communicating with donor prospects. These advanced segmentation profiles set your donor communications apart with highly personalized messaging to equip your team to be even more effective in growing your relationships with your donors. *Once you know **who** are your best prospects, we'll then tell you **what** messaging will resonate with them most.*

# Match Staffing Levels to Donor Capacity: Advocating for Additional Investment in Fundraising Staff

Nonprofits often face the challenge of convincing board members and other stakeholders of the need to invest in fundraising staff. To provide an objective analysis of the investment in staff, highlight the return on investment (ROI) of adding more staff, as well as the impact of staff turnover on donor retention. The ROI can be significant when you consider overall revenue growth resulting from more and larger gifts. JGA has helped clients create a cost-benefit analysis for leadership by using metrics on current staff capacity for donor visits and demonstrating the additional philanthropic revenue that could be generated by investing in growing that capacity with new staff members.

Knowing the ROI of your fundraising efforts can help you make a strong case for investing in competitive compensation packages, professional development, and career advancement opportunities for fundraising staff.

## Conclusion

Maximizing the effectiveness of your fundraising staff is a complex and challenging task, and it is essential to achieving your organization's fundraising goals, and ultimately, fulfilling your mission. Remember to prioritize the top donor relationships, plan for staff turnover, and stay committed to increase funding for your nonprofit's mission and values. With these strategies and tips in mind, philanthropy can be the catalyst for your nonprofit to change the world.

### Sample Donor Coverage and ROI Analysis

Current staff could conduct around 1,750 visits and engage 855 people from this pool, potentially resulting in around \$13M in support. That left a gap of almost 700 people that were still highly rated but would not receive a visit and could result in approximately another \$5M in support. This chart shows the resulting donor coverage of adding two additional major gift officers.





Acuity®

Actionable intelligence on your most passionate donors.

## Unleash your donor data and focus your development efforts

Acuity® helps you evaluate your donor base and streamline prospect management. Acuity can transform the way your organization thinks about prospective donors by getting gift officers in front of your best prospects sooner. Combined with JGA's experienced analysis, Acuity helps focus your staff's time and attention on the right prospects and allows you to develop a deeper understanding of the capacity and passion your donors have to support your organization.

Acuity provides actionable intelligence. There's no subscription to purchase or long, drawn out process to get results. Your team can begin using Acuity's guidance to call on your most passionate donors in approximately 60 days and for less than \$20,000 for most organizations.

Using Acuity, our clients have uncovered on average 60% more top donors hidden in their donor database.



**Contact us now** to have a free 30-minute consultation to see how Acuity could be tailored to help your organization deepen relationships with the best donors and prospects to further your mission.

empowering nonprofit potential