

## Engaging Your Major Gifts Officer: Six Steps to Optimized Performance

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To sustain your foundation's programs long term, you need to go after Major Gifts, which typically account for 40% of funding. The Major Gifts Officer (MGO) directs this goal by raising the lion's share of gift income and cultivating donors for continuous, decades-long giving. This means having a strong MGO who is committed to your mission and has good reasons to stay with your foundation.

A high-performing MGO is a major asset, but it takes an average of 24 months for him to reach his stride in a new organization. Most MGOs also stay only 16 months on the job, putting many foundations in

a revolving talent deficit for this mission-critical role.

Repeat MGO turnover can cost millions of dollars in replacement fees and lost opportunity. The average health care foundation spends \$66,500 to find a new MGO and forgoes \$2.7 million in major gifts during MGO replacement and ramp-up. That's a loss of almost \$2.8 million for failure to retain a high-performing MGO.

MGOs rarely jump ship because of salary. Rather, they seek a new company whose supervisors better understand what it takes to do the Major Gifts job, and where energizing programs, tools, and support are in place to motivate a good MGO to become even greater.

Grooming and retaining a top MGO takes total engagement—a six-step, systematic approach that the best philanthropic managers follow to motivate and retain their direct reports. If you commit to these steps, you can help your MGO stay keen to your foundation and quickly rank among the top 75% fundraisers in the country.

### ***1. Plan for long-term career growth, from Day 1***

Optimizing talent is a journey not an event, and smart managers match career planning to personality. The best MGOs are self starting, go-getter types who love a mission, a challenge, a lot of variety, and an opportunity to make a difference in something important.

Set an evolutionary path for your MGO for her first two weeks, the next six months, 24 months in, and so on. Review the plan and her progress regularly and adjust as her interests and skills grow. If your MGO has been onboard awhile, first fill in any gaps from her first months on the job, then move forward with a career path from there.

*Outcomes:* Encourages long-term MGO commitment; keeps her continuously engaged; supports her way of interacting with her work.

### ***2. Focus on the right tasks, with measurable goals***

Top-notch managers of top-notch

MGOs know that success is about relationships and trust. They set clear, specific expectations that stretch the MGO just enough, and have consistent evaluation standards and methods to reward the stretch.

This means forming measurable daily, weekly, monthly, and yearly objectives that create accountability and feed off of your MGO's natural drive to excel. "Bring in more money" isn't measurable or motivating. "Add fifty new \$25,000 donors by end of Q4" and "Always have one third of your portfolio ready to be asked for a gift, one-third being stewarded for a future gift, and one-third being thanked for a recent gift" are concrete and actionable.

Have follow-through that dials in on specific metrics questions. Don't just ask, "How are things going?" Delve instead: "Did you contact 25 new people a week? Did you convert at least half of them to future appointments? Is 10% of your portfolio still at the A level?" If your answer to these questions is "I don't know," you're not engaging enough with your MGO's goals, process, and success.

*Outcomes:* Builds trust in your ability to support your MGO; helps you understand his activities and responsibilities; motivates him toward ever-higher standards.

### ***3. Provide meaningful, exciting options for the MGO to present to donors***

Unless your MGO is emotionally connected to her goals, she will leave after six months. Your job is to create meaningful value

propositions that engage her and your donors, making it easy for them to "connect the dots" between your program's need and their ability to support it.

Give the MGO the best, most compelling projects, with some degree of urgency and momentum for fund raising. Develop a menu of projects that has something for every kind of Major Gift donor. Demonstrate how each program connects to your mission and how the money will be spent, so donors can seize its value: "If I give \$100 to this program, I'm helping this group provide free breast exams to 25 at-risk, low-income women." MGOs are not magicians or miracle workers—they need the best programs you can provide to draw in the biggest funders.

*Outcomes:* Improves MGO longevity and personal buy-in; establishes vital system support so she can pitch your cause with concrete data and value-add.

### ***4. Be available to your MGO at "hot points" of the prospect cycle***

The top performer is always the one who knows his boss "has his back." You can do that for your MGO by leaving (and telling your MGO about) five or six openings on your calendar a month that he can automatically use to plug you into a meeting with a potential donor at a moment's notice. Sometimes all that's needed to swing a top prospect over is a concerted approach to the value proposition.

*Outcomes:* Reinforces mutual trust and alignment; displays your organization's high level of commitment to donors.

### ***5. Let the MGO work the way she thinks is best***

Micro-managing destroys high performance: your task is to provide guidelines and target outcomes, not instructions. Let your MGO spend the budget you set, and don't nickel and dime on a meals and entertainment budget on a path to achieve a \$500,000 gift. Major Gifts are a marathon, not a sprint. Payback is not immediate, and at times the expense is not commensurate with income as your MGO builds her Major Gifts pipeline. The long-term returns, however, can be tremendous once the "turbo" kicks in. Give your MGO the budget, the tools, and the freedom to operate within the framework of what she must do.

*Outcomes:* Motivates your MGO to do her job well; establishes mutual trust (rather than antagonism); gives her the time and resources to land the best prospects and largest gifts.

### ***6. Support the Major Gifts Office with a "core of champions"***

Top-ranked MGOs spend nearly 80% of their time leveraging the time and energy of core program champions on behalf of Major Gifts. Core champions can be an entire board of directors, an individual board member, your company president, a successful client, an advocate, a volunteer, or anyone else closely involved with your program. Champions can support your MGO by accompanying him on a donor call, contacting donors, providing a referral for the MGO, writing letters to prospects, and so on.

*Outcomes:* Motivates your MGO through unanimous excitement for his plans; engages key players in major gifts; shows donors your organization's depth and breadth of commitment.

***Pulling it all together***

Only 1 out of every 100 MGOs is a true superstar in Major Gifts, and one size does not fit all for how to retain and inspire them. Determining what

motivates your MGO and creating systems to reinforce that is a both high-level skill and a process.

The six steps outlined here can open the way for you to retain and grow your MGO, so he stays excited about his work, excels at his job, and stretches to be his best on behalf of your foundation...and not someone else's.

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*a philanthropist and fund-raising development professional himself, Casey has more than 20 years' experience in senior philanthropy positions, including being the Senior Vice President of Philanthropy at PeaceHealth. There, Casey led a team in raising \$165 million to support the local hospitals of nine PeaceHealth foundations.*

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