

The PULSE of Donor Relations Survey Results and Observations

Compiled and Edited by Lynne M. Wester, Donor Relations Guru, and Debbie Meyers

While conceptualizing the “Pulse of Donor Relations” survey six months ago, I had no idea what I was getting into. Frankly, I saw a need to fill but was unaware of the overwhelming response that awaited. Two months later, this report details the findings and demonstrates the breadth and depth of the profession. The 915 respondents to this survey not only make it statistically significant, they also show the need and desire for relevant information on the profession of donor relations -- a need that until this study has never been filled.

Donor relations is the key to successful fundraising. Without comprehensive donor relations efforts, our donors will not give again and fundraising will grind to an unsuccessful halt. As many learned in the recent economic recession, cutting donor relations programs is the exact wrong idea. When budgets are tight and times are tough, institutions should rely more than ever on their donor relations professional to help lead the way to success.

As the donor relations profession has expanded exponentially in the past years, it was a challenge to keep up or quantify the magnitude of the growth of the profession. The survey spans organization type and size, underlining the ever-increasing importance of the profession. Just like the diversity of our respondents, the diversity of tasks within our responsibilities is enormous, as is the disparity in salaries, budgets and resources. Deep gratitude goes to those who answered the salary questions, enabling us for the first time to compare and contrast among institution types and job titles.

It's not necessarily surprising but it is somewhat sad how we rely on the task at hand, being reactive instead of proactive. The profession is a dynamic one, evolving with the sophistication of professionalized fundraising. Lack of planning and strategy are often the result of a profession growing without time for proper vision and direction. This trend is changing and it's good to see us bring our heads up from the work to view and plan for the future ahead.

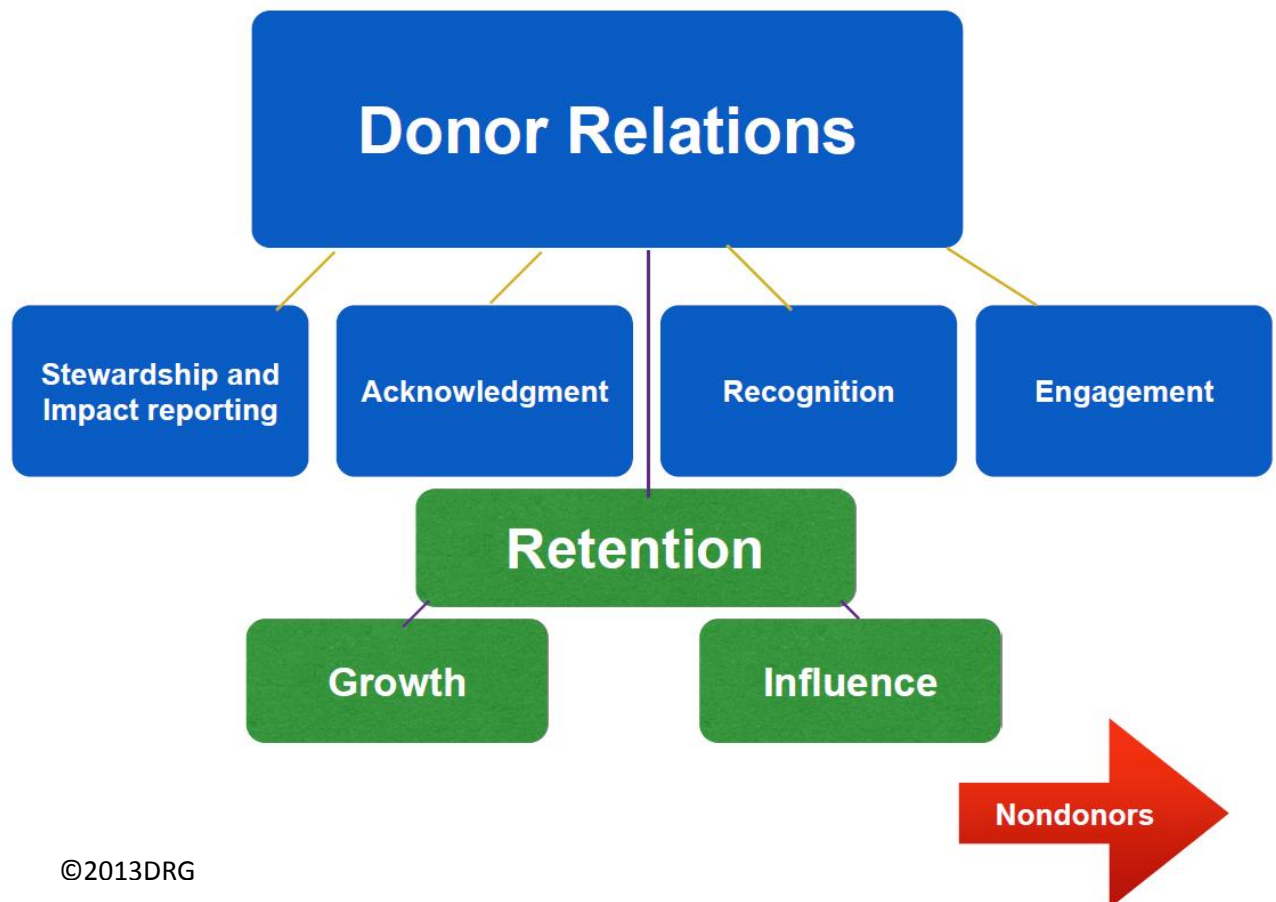
Finally as you read this, remember that the power lies not just in the group, but in the individual response, the effort and surge of ownership and pride we take in our profession of donor relations, a profession and vocation based in gratitude. On that note, I would like to publicly acknowledge my gratefulness to Debbie Meyers of Carnegie Mellon University who has been my silent partner in this project from its inception. She has been steadfast, helping, encouraging and enlightening, a true friend and professional in helping me compile and sort the data that you see here. I am blessed to have such a wonderful peer, mentor and friend and this compilation would not be possible without her guidance, assistance and strategic leadership.

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at lynne@donorrelationsguru.com to discuss. No one should use this data illegally to make a profit; it comes from the best of us and in us and should remain in the domain of the greater good. Those who violate this policy will be pursued.

More good news: Data on budgets and commentary from you, the respondents, will be coming soon. (Pivot tables are an art form you know!) Be on the lookout!

This is a diagram of the fundamental purpose and scope of donor relations I created for my clients to help them understand please share as you like. I have it in PDF or PowerPoint as well.

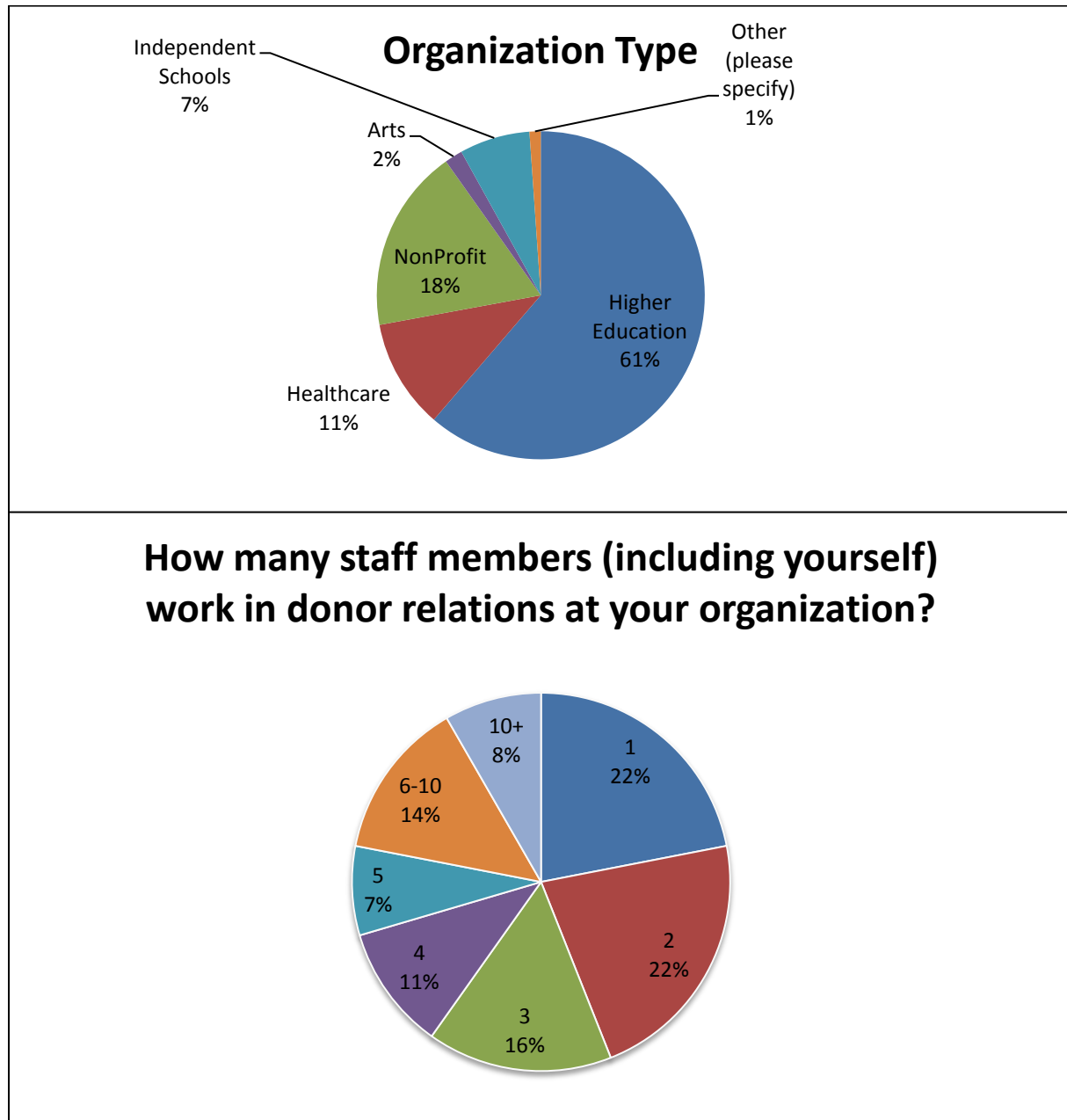


The following categories represent the survey in a format that is more easily digestible sections over the following 25 pages.

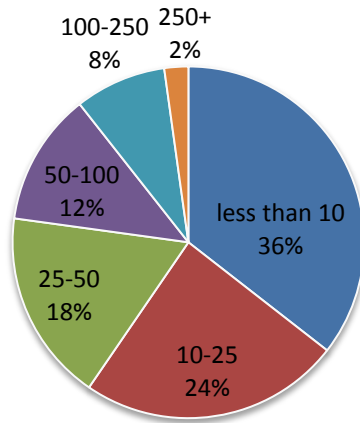
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ABOUT YOUR ORGANIZATION:

From large hospitals to small independent secondary schools, organizations represented in the Pulse of Donor Relations survey are diverse and varied as are the number of their staff. . The importance is in the simplicity of the message: donor relations has had a wonderful coming out party and is hitting its stride. How do we go about raising more awareness for our profession?

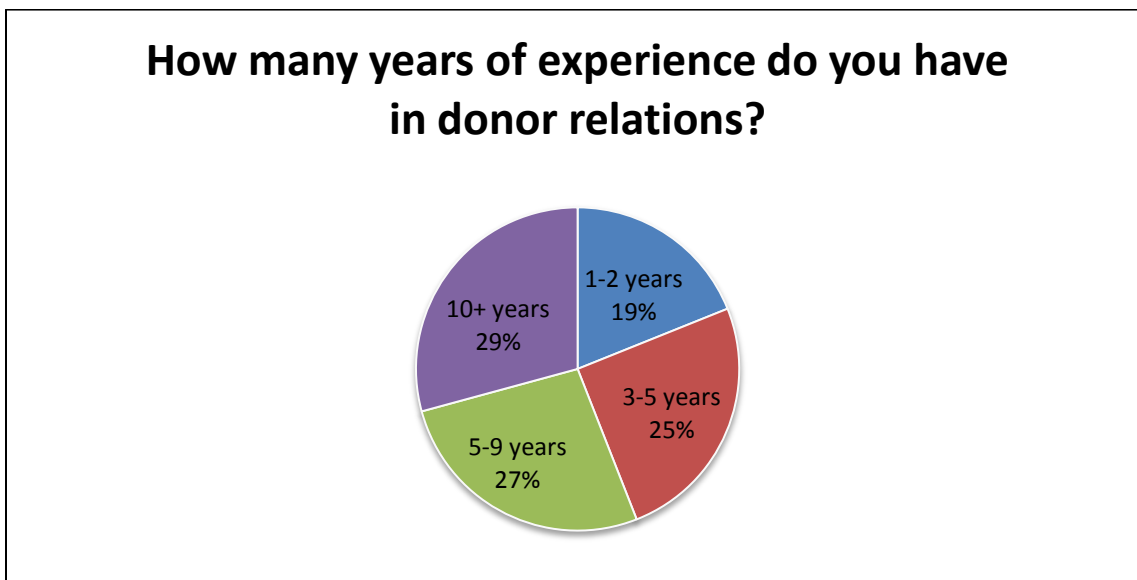


**How many staff are in your
fundraising/advancement operation or
division at your organization?**

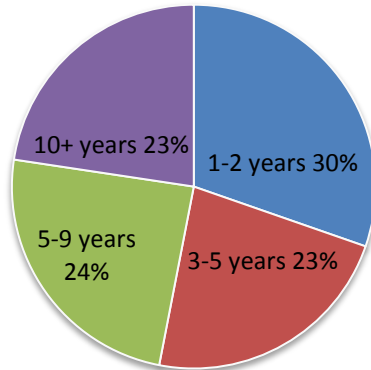


ABOUT YOU:

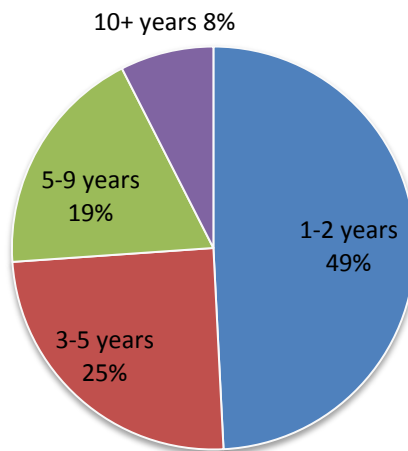
As you can see from the charts below, not only are donor relations professionals more experienced than ever -- with more than 58% having been in the field for five years or more -- but the majority are in new positions. From that we can glean that more jobs are opening and the pool of experienced talent is becoming more shallow. We are dedicated professionals; almost 70% of us would like to stay in the field in the next five years, a stark contrast to other nonprofit professionals. Perhaps our loyalty is due to the enormous job satisfaction and wide range of duties we are able to enjoy through our diverse skills and tasks, as noted below in the chart of responsibilities. These duties and responsibilities fall nicely into the four pillars or categories of donor relations: acknowledgment, stewardship and reporting, recognition and engagement.



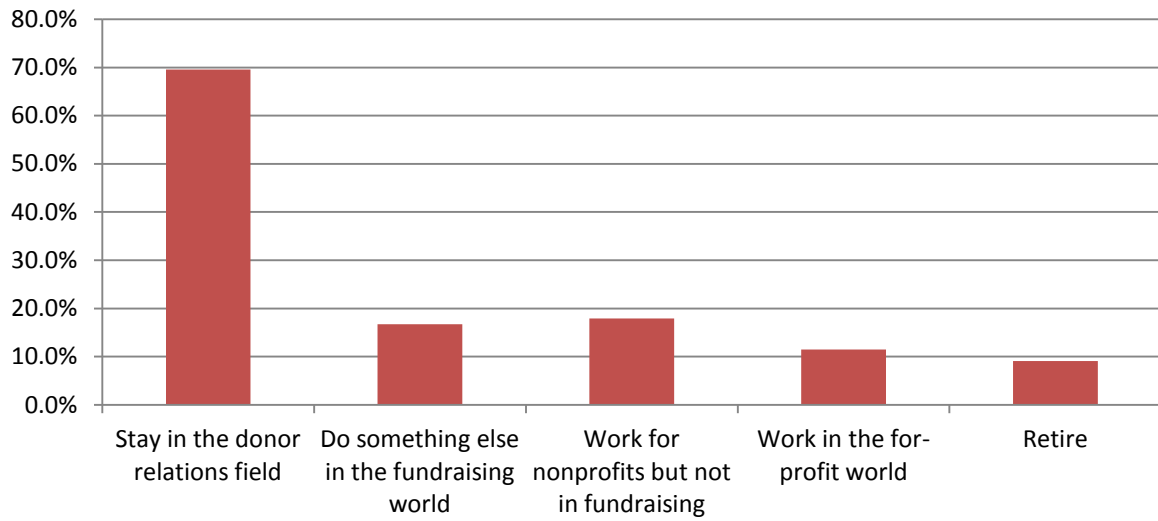
How many years have you been at your current organization?



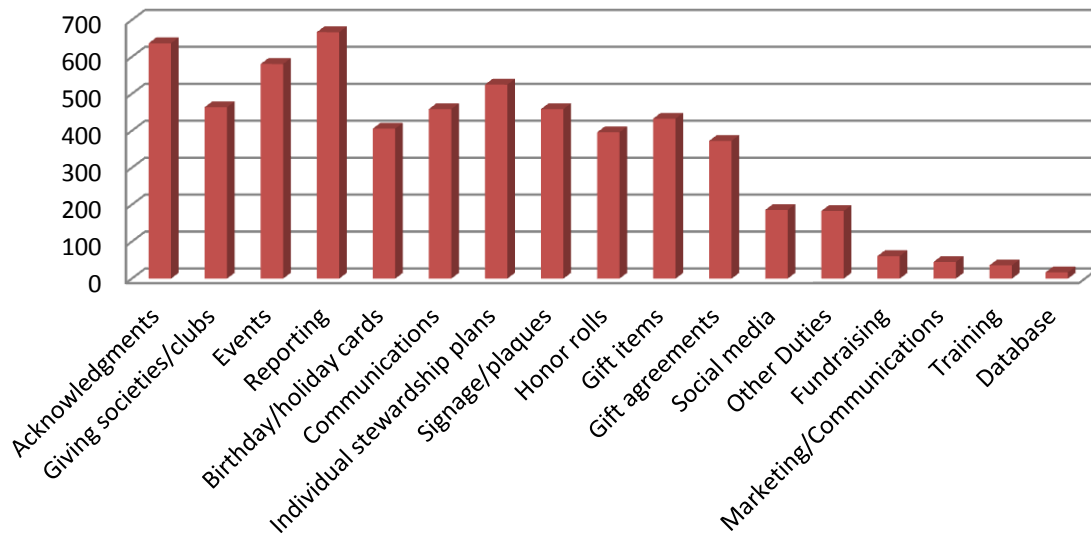
How many years have you been in your current position?



In the next five years, would you like to...



All Duties You Are Responsible For



SALARY DATA:

Many have been waiting with baited breath, underpaid and overworked (at least in our own minds), for the salary data that follows. We did our best to provide accurate data and interpretation, counting mostly those that have direct donor relations responsibilities in their portfolios. We have used averages, but also have specific data. The ranges are a bit horrific. Finding a director who makes \$35,000 and one who makes \$125,000 is eye opening, to say the least. The good news is that now we have the data to place a stake in the ground for higher compensation and more staffing. It is time -- past time -- for us to be compensated on the same level as frontline fundraisers and other key staff of the development operation. It is our responsibility to provide a strategic professional vision that helps accomplish this mission, not just complain and shake our heads. We have to prove our worth through defined, objective, measurable metrics.

This chart will help you interpret titles as abbreviated in the graphs. If you would like more specific salary data, please let me know and I can try to drill down to your exact needs.

AD=Assistant Director

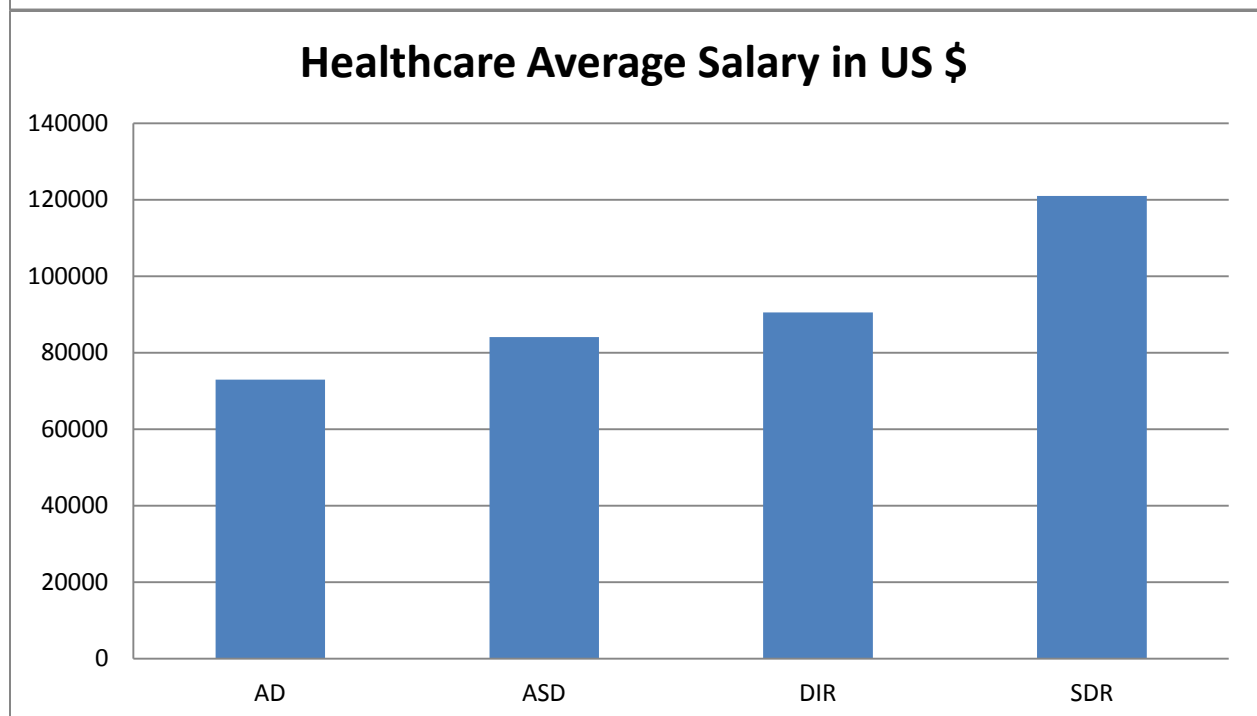
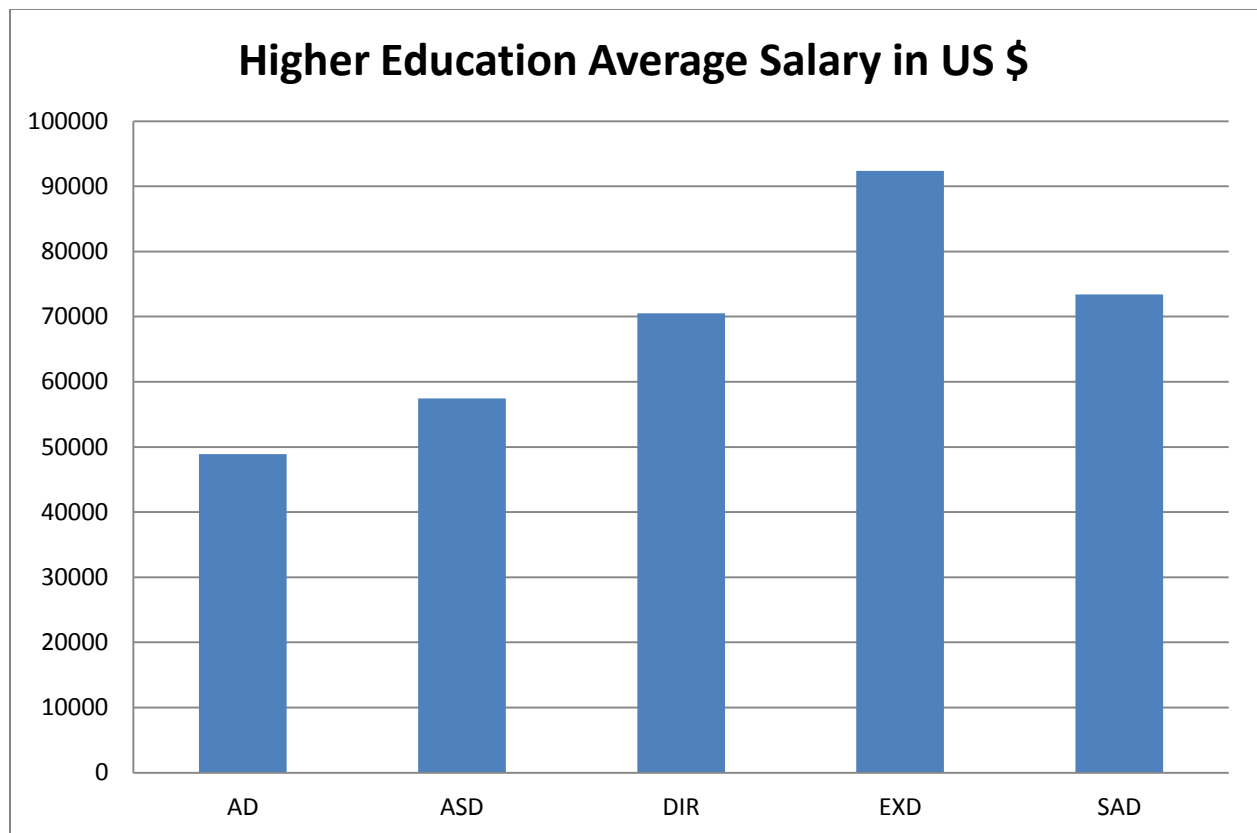
ASD=Associate Director

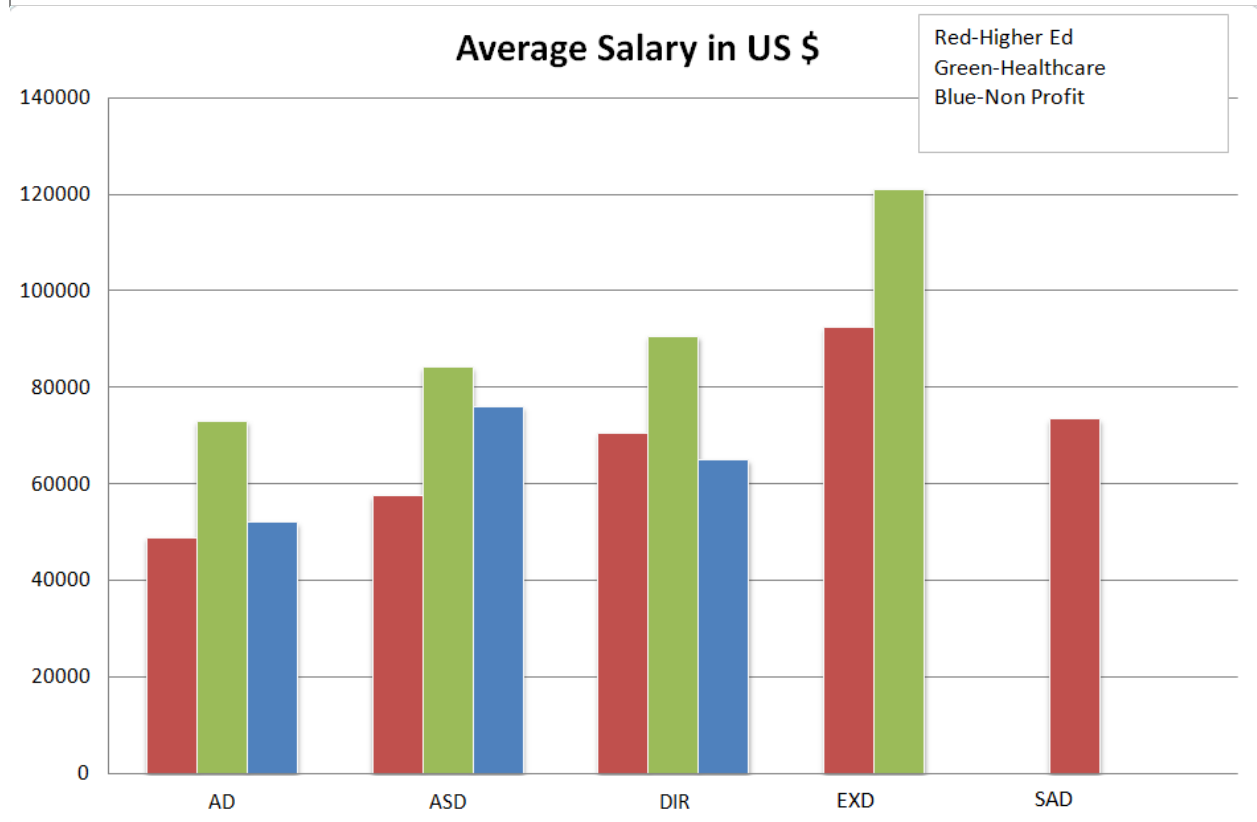
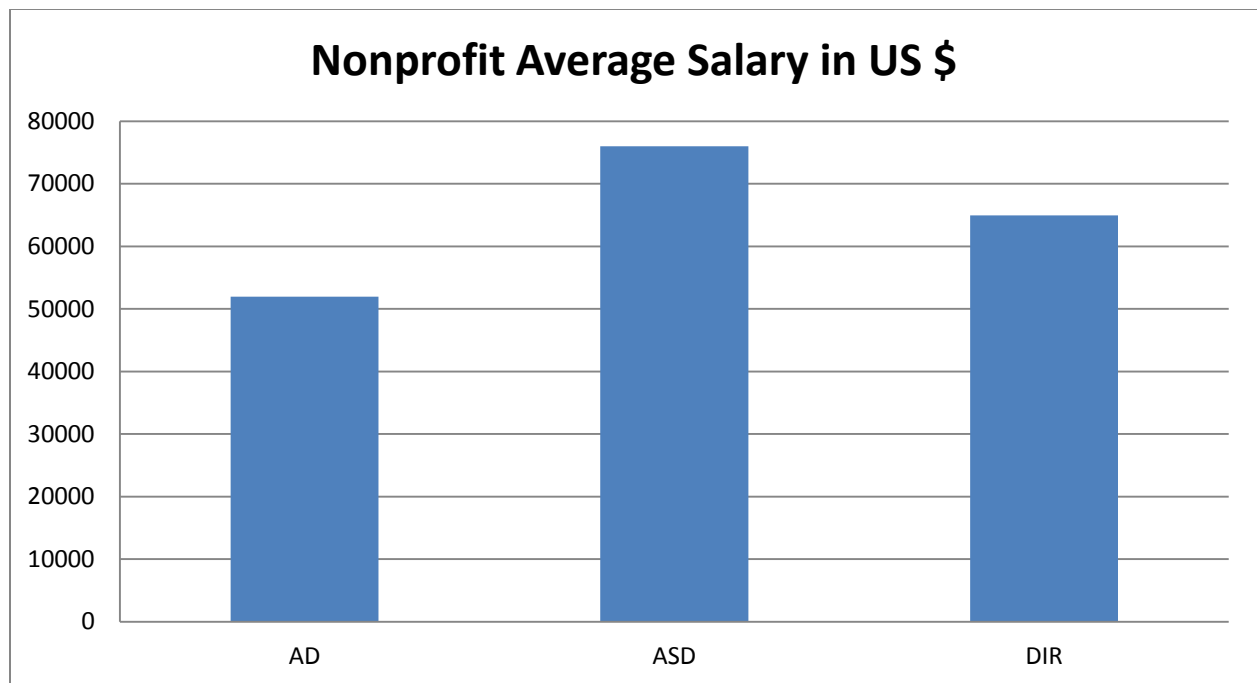
DIR= Director

EXD=Executive Director

SAD=Senior Associate Director

SDR= Senior Director

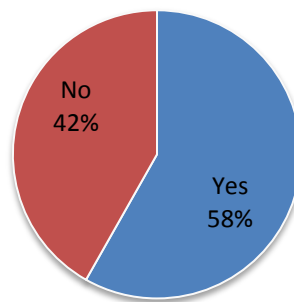




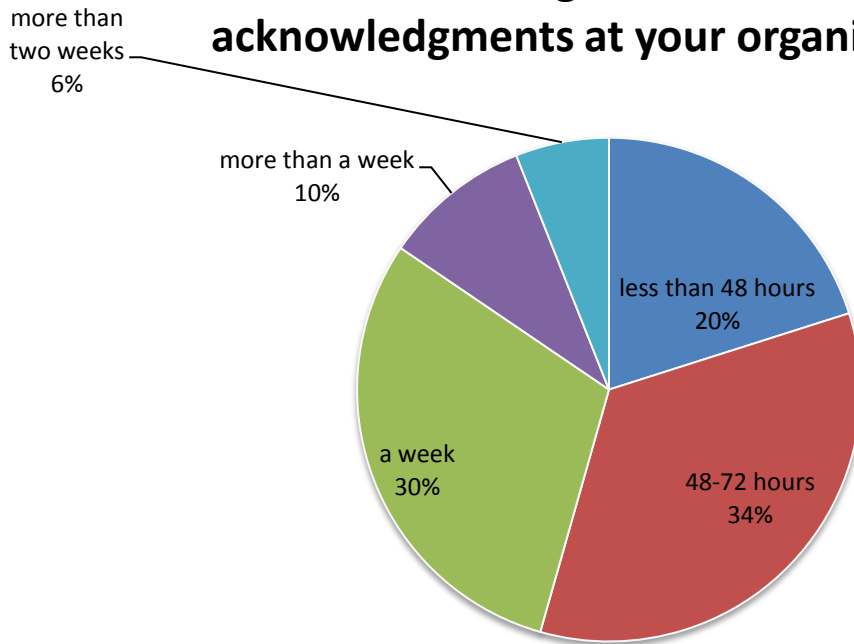
ACKNOWLEDGMENTS:

Acknowledgments remain the bedrock of our function in donor relations. If we aren't thanking our folks in a timely and meaningful manner, then we can kiss donor retention goodbye. It is often their first impression of our organizations, and details are important. Acknowledgments and receipts are two different things, as stated clearly in my [blog here](#). We need to work on this as a concerted effort of our profession. About 16% of us are waiting more than one week to get our acknowledgments out the door to our donors, which is unacceptable and far from best practice. While many of us work hard at making this happen, 84% of us, the latter is a severe detriment to donor relationships. These letters are vital, which is why the wording should also be refreshed at least yearly. Can't stand to write another letter template? Head to my website to the great [acknowledgment swaps](#) for hundreds of letters at your fingertips!

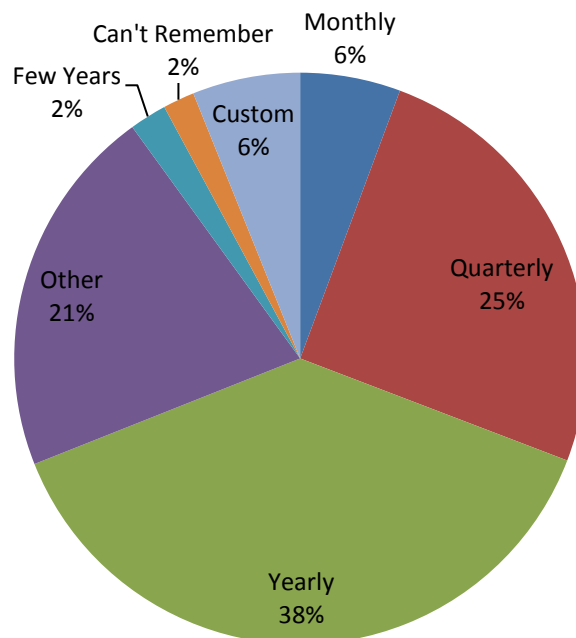
Are the acknowledgments separate from gift receipts at your organization?



What is the average turnaround time for acknowledgments at your organization?



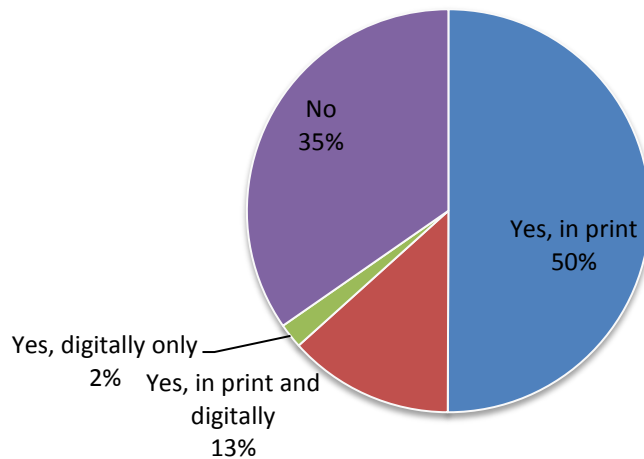
How often is the acknowledgment template letter refreshed at your organization?



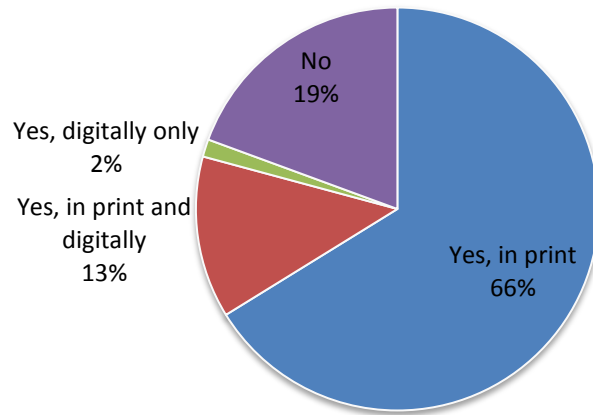
REPORTING:

Another core pillar of donor relations is stewardship, a necessity for donor transparency and trust. Surprisingly, 19% of people said they provided no financial accountability to their donors, and 35% said they write no narrative reports. How can donors know the impact of their giving if we don't tell them about it? We must be accountable to them and their money, in part to avoid sticky lawsuits and unhappiness, but mostly because it is our duty as stewards of their gifts. The more transparent we are, the better the relationship of trust becomes. Also, many of our donors are pushing us to provide real-time access through an online system or to have their information presented digitally, so we need to catch up to their needs in this department. We can turn any printed report easily into a PDF that we can deliver digitally. The field of custom and individual stewardship plans continues to grow as we expand our offerings. It seems from both practice and data that 25 is the most manageable number of donors to create plans for. This is a reflection not only of staffing but the desire to keep this an exclusive benefit for top donors.

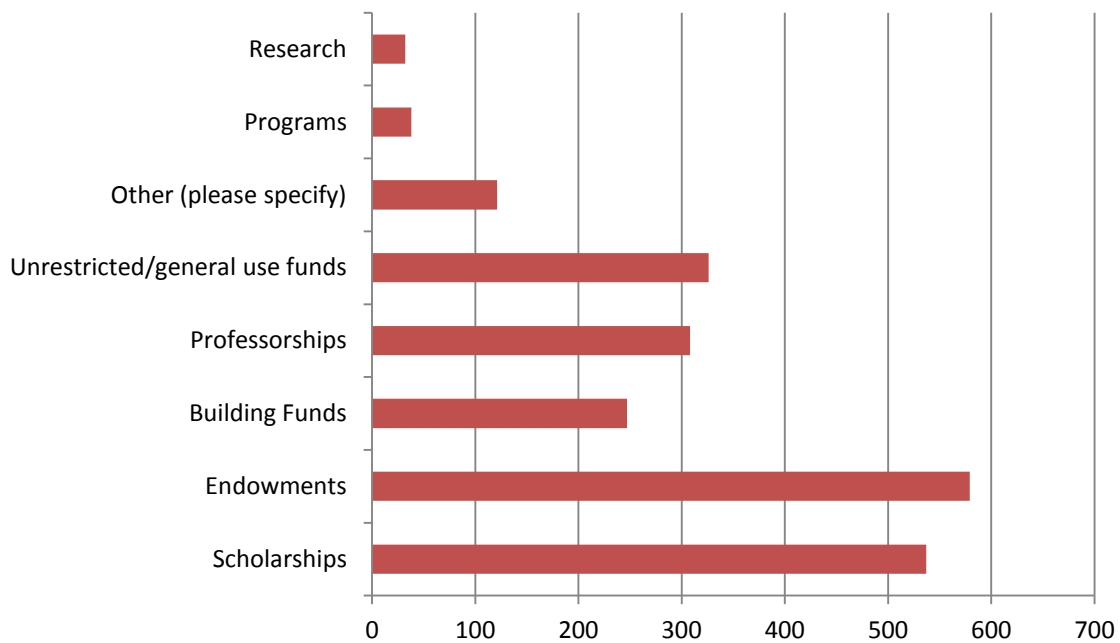
Do your donors receive annual narrative reports on their funds?

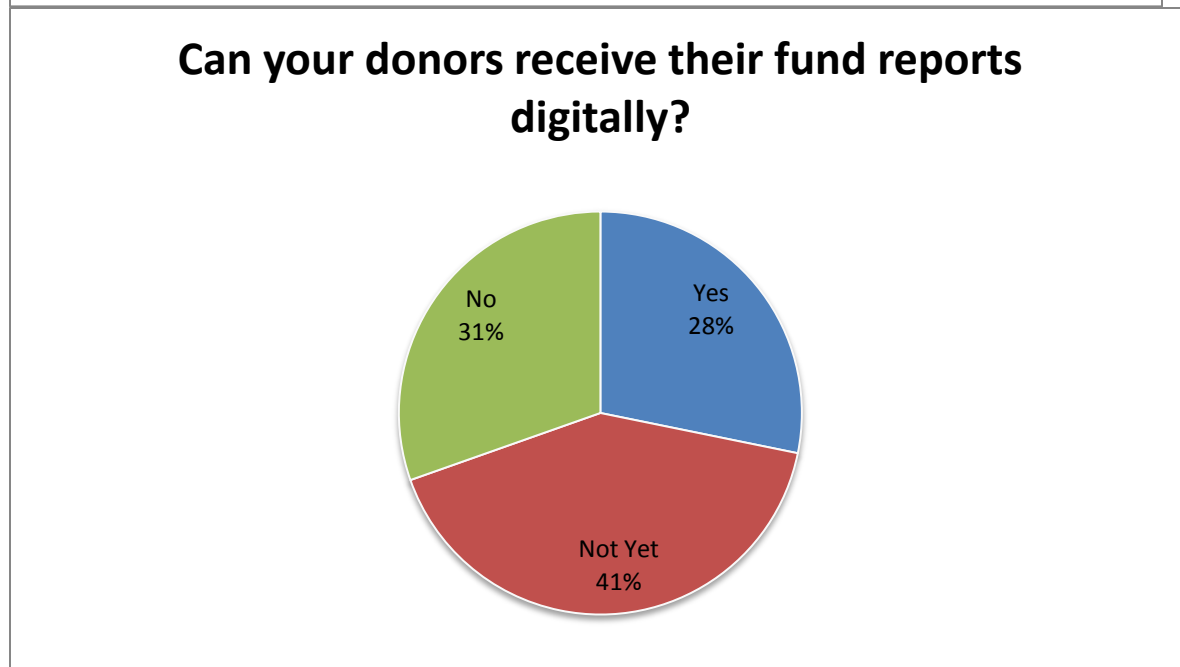
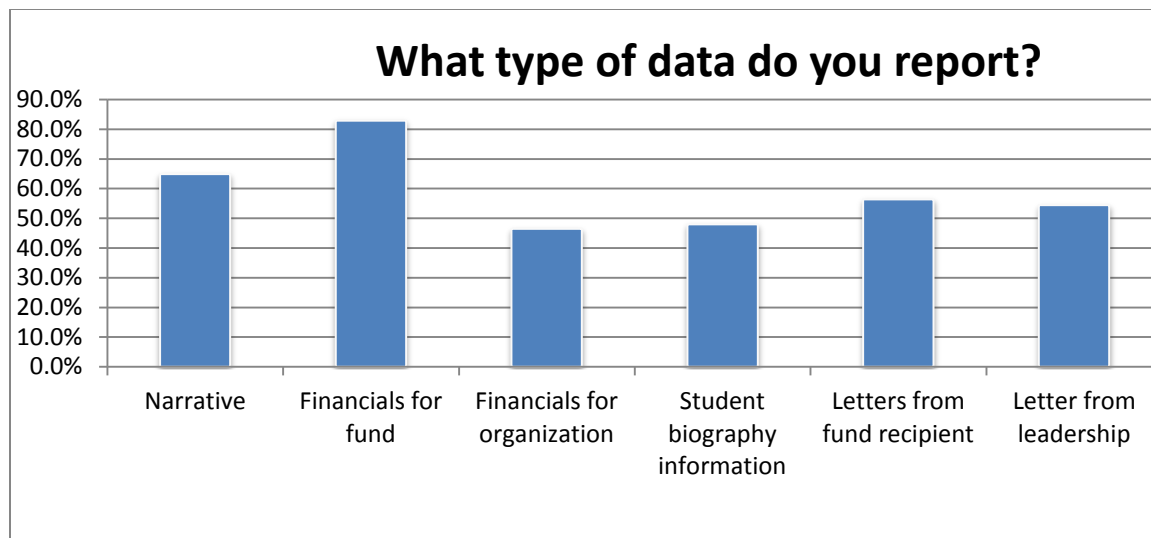


Do your donors receive annual financial reports/stewardship on their funds?

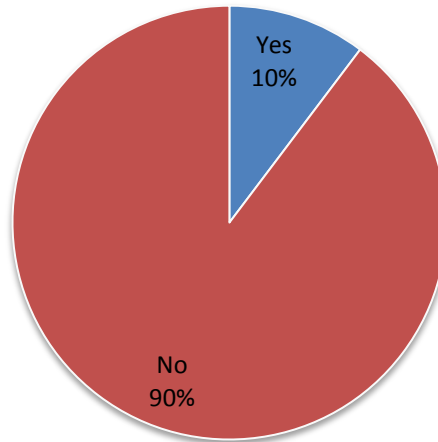


What type of funds do you report on?

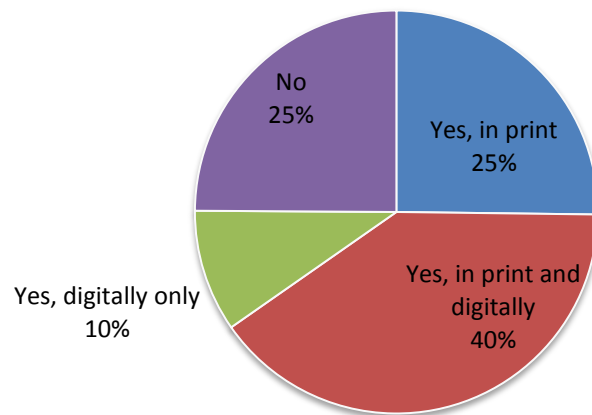




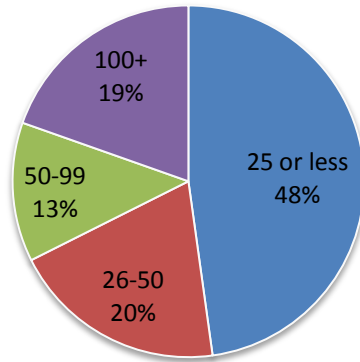
Do donors have an online portal where they can access their data?



Does your organization produce an annual report?

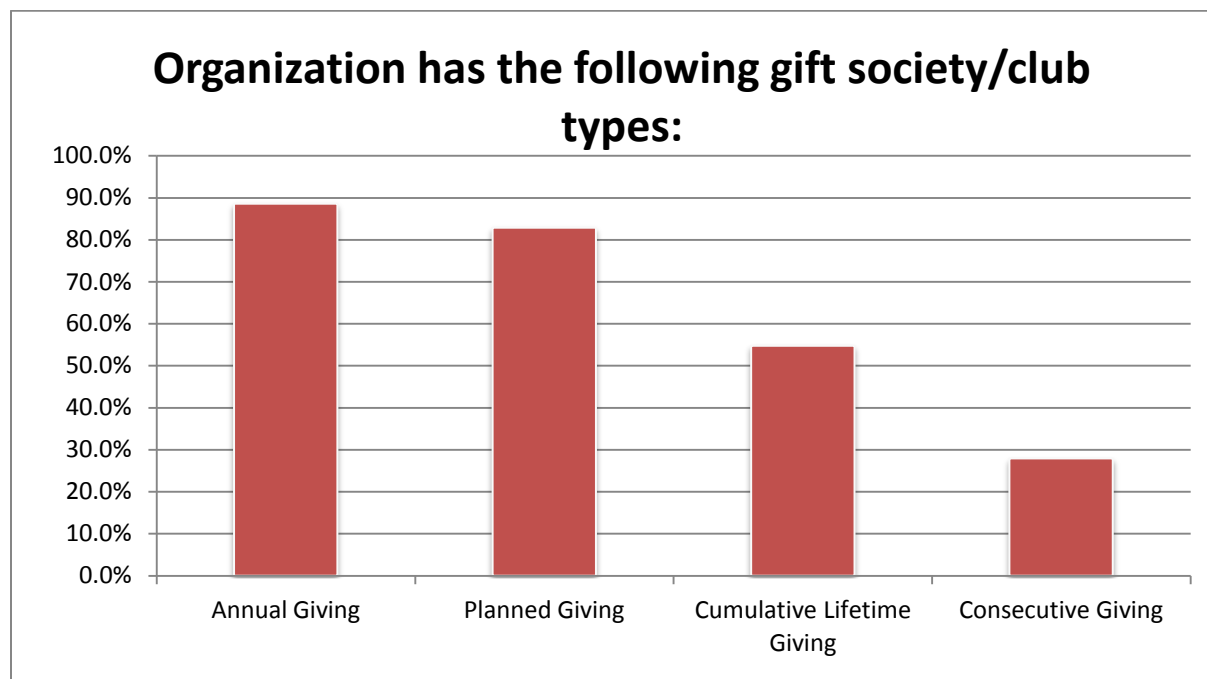


**If your organization has custom/individual
stewardship plans, how many donors are
included?**

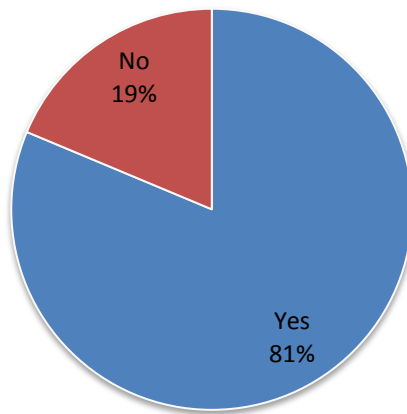


RECOGNITION:

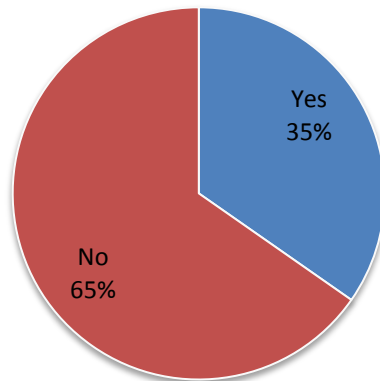
In the grand scheme of donor relations, recognition is a big bucket. That almost anything can fall into Gift societies, physical recognition, naming and other forms have existed for a while, but recognition in the large sense is not well defined. What we must do as strategic practitioners is determine the best use of time and resources for recognition, and the ROI of our efforts. It is a fantastic thing to see [donor honor rolls](#) dying off en masse. In addition, many of you mentioned that you (with assistance from new [IRS quid pro quo laws](#)) are completely doing away with give-aways and dreaded tchotchkes, replacing them with custom meaningful recognition as part of individual stewardship plans. Applause! Continue these efforts and anything else that makes donors feel closer to our organization in a non-paperweight way. One of the remaining puzzles lies in gift societies and their evolution, their inclusion of meaningful yet non-tangible benefits and their role. Are giving societies effective? The jury is still out. But one that has reaped great rewards is a giving society for loyal or consecutive donors. If you haven't explored it yet, I hope you do.



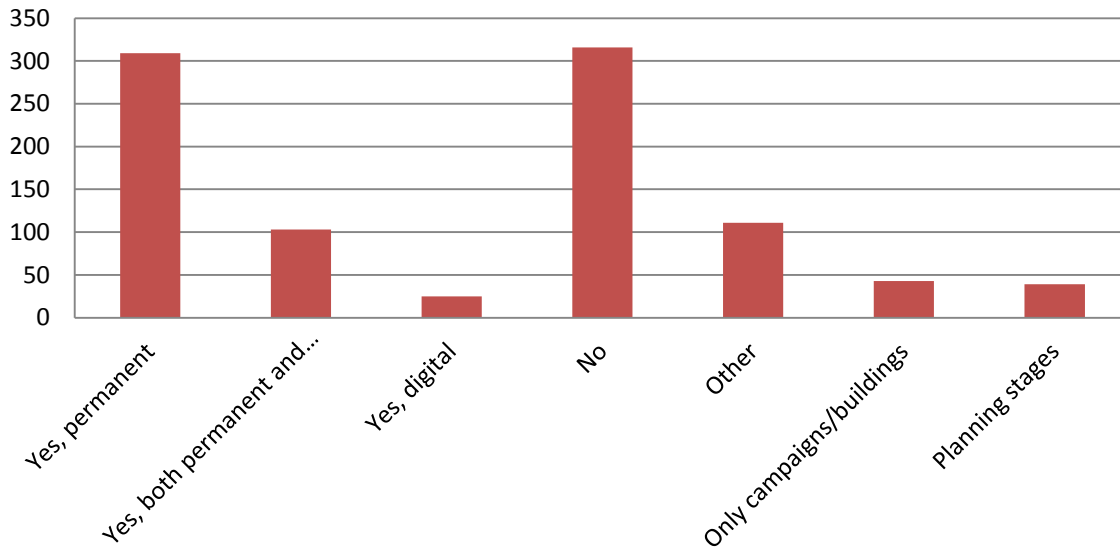
Do your gift societies/clubs have levels?



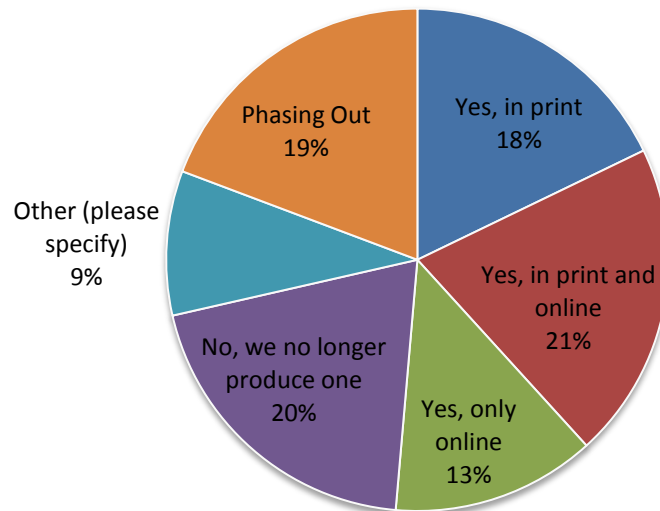
Does your organization have a comprehensive catalogue or listing of all named spaces?



Do You Have a Donor Wall?

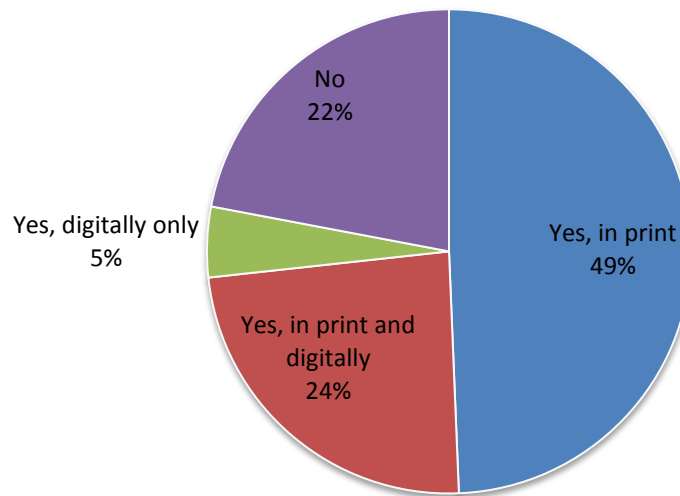


Does Your Organization Produce an Honor Roll?



27% are phasing it out and 28% no longer produce one. That means 55% are eliminating or have eliminated them.

Do donors receive birthday and/or holiday greetings from your organizations?



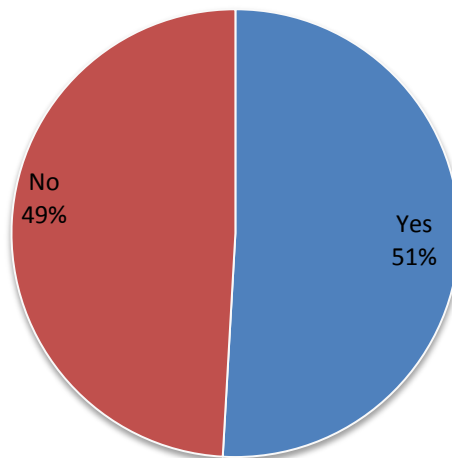
Do you order and maintain gifts for the following purposes at your organization?



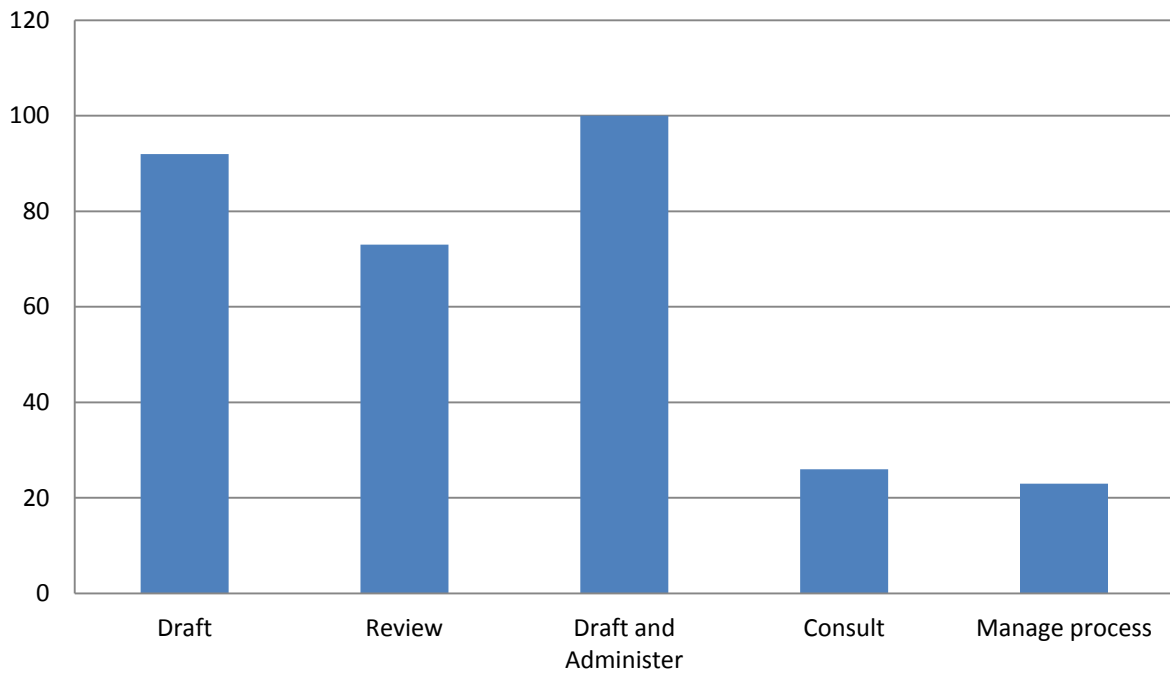
GIFT AGREEMENTS:

Just more than half of us are involved in the gift agreement process at our organizations. The good news is that 79% of us have standardized templates, a highly recommended practice. I am looking forward to swapping templates soon. Donor relations should at least review gift agreements to make sure that the institution's promises and the donor's expectations are feasible, legal and, for endowed agreements, timeless. Crafting a good gift agreement is an art form and can save your organization a lawsuit in the future.

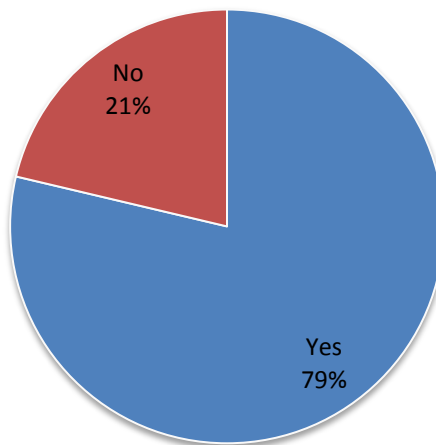
Are you involved in the gift agreement/MOU process at your organization?



How Are You Involved With Gift Agreements?

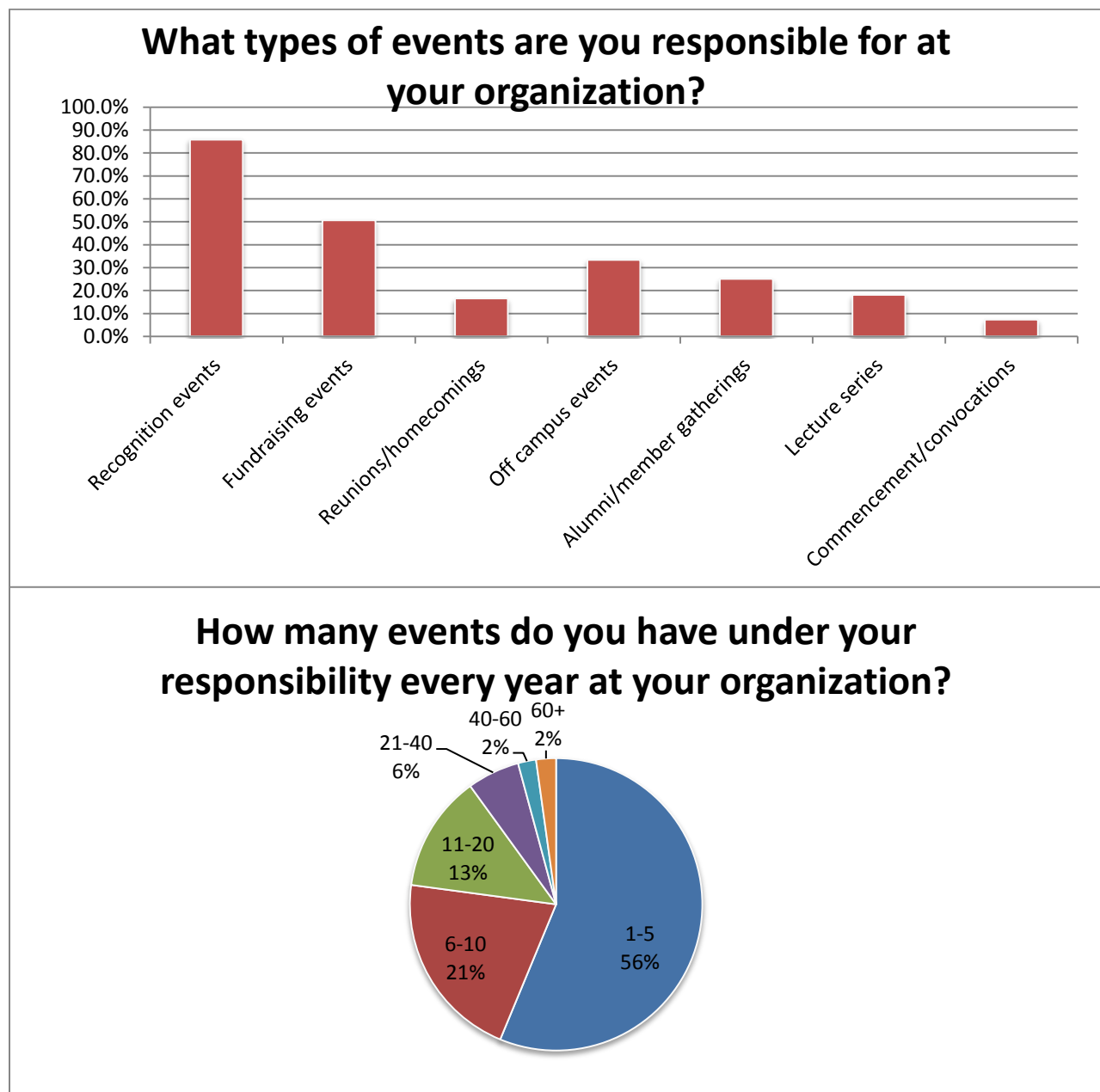


Do you have standardized gift agreements/MOUs for donors?



EVENTS:

Events can play an important part in the overall fundraising operation and they can take many forms. They are not, however, a magic bullet to donor engagement and recognition; they are a tool in our toolbox. Budget and event numbers range widely, and that data is still being compiled as we speak to be shared later. It is important to note that RSVPs have become an issue for many of us, so the easier you make it for donors to reply, especially online, the better your process will be. In addition, we need to ensure that we are properly evaluating the ROI on our events and making sure resources are in the right areas. Need to do that? I have a great spreadsheet that can help you -- just ask me for it.



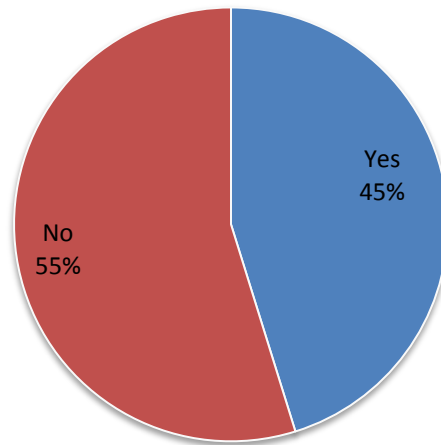
How are RSVPs for events processed at your organization?



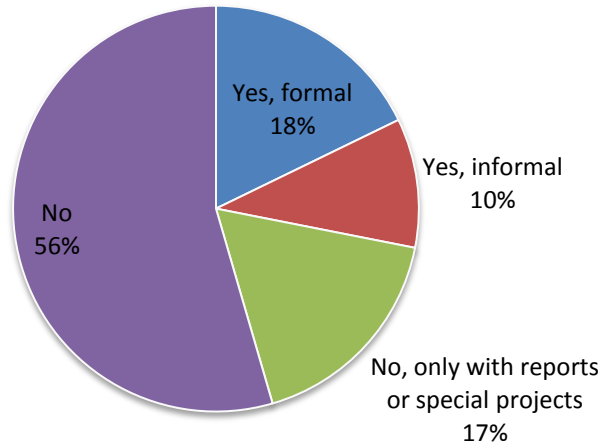
METRICS AND PLANNING:

As a strategist and visionary, I find metrics and planning to be the one area we need to improve upon the most. The fact that more than half of us don't have strategic plans is baffling. This lack of planning leads me to think that we are still evolving from a reactive profession to a strategic, forward-thinking profession, bringing with it higher salaries, increased visibility and importance within our operations. If we're not being strategic about our donors' care and nurturing, who is? Without sophisticated planning, we also have no accountability and metrics programs for our work. We are forced to rely on anecdotal rather than empirical evidence. Moreover, if you're going to build an entire program, shouldn't you know what your audience wants before building one? Feedback from our donors is crucial to our success; we can't just assume we know what they want. We need to ask them and then build a strategic vision based on their needs. Once we build the plan, we need to implement and measure its success. Our challenge is to become more intentional, data-driven and strategic with our vision for donor relations.

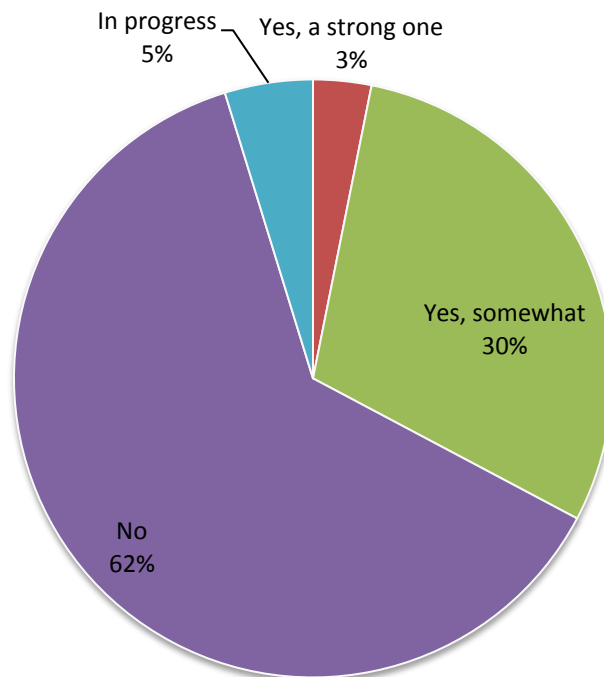
Does your organization have a comprehensive or strategic plan for donor relations?



Have you conducted a formal or informal donor survey?



Do you have a metrics program for donor relations?



LOOKING AHEAD:

More rapid change is ahead of us. As organizations venture to raise more and more funding, like a billion dollars in one year, donor relations will have more and more opportunities to thrive and flourish. We remain an integral part of the fundraising landscape, whether we choose to acknowledge it or not. As the future unfolds at our feet, even more importance will be placed on the personal efforts and engagement that donor relations provides. And we must rise to the greater strategic challenge.

Putting *donors* at the center of our efforts, and not just their gifts, building intentional and strategic programs of strong and metric-based efforts -- these things are driving us forward. By increasing our use of technology and demanding that change and calculated risk are not only acceptable but encouraged, we together can change the face of donor relations. We can leave behind ineffective past practices like donor honor rolls and tchotchkes and build the next practices that have profound impact on donor behavior and sentiment.

My hope is that you absorb and analyze this valuable data and use it as a tool to evaluate your organization and benchmark with others. It is vital that the change begin with us. Show this to your leadership in whole or the pieces that pertain to you. We can help the shift of mindset that can and will occur with empirical evidence and not just anecdotes. I am dedicated to help provide you with the tools to be successful in your efforts, from informative blogs, educational webinars, sample sharing, audit and consulting services, networking, free advice and more, all provided for you as we grow the profession. I would love to hear your feedback and your thoughts on the "Pulse of Donor Relations." Please contact me any time at lynne@donorrelationsguru.com