

THE FUTURE OF FUNDRAISING

WALKER ART CENTER, SEPT 9-11, MPLS

Ascent Report:

What is the Impact of Dean Diversion?



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EXECUTIVE CONFERENCE

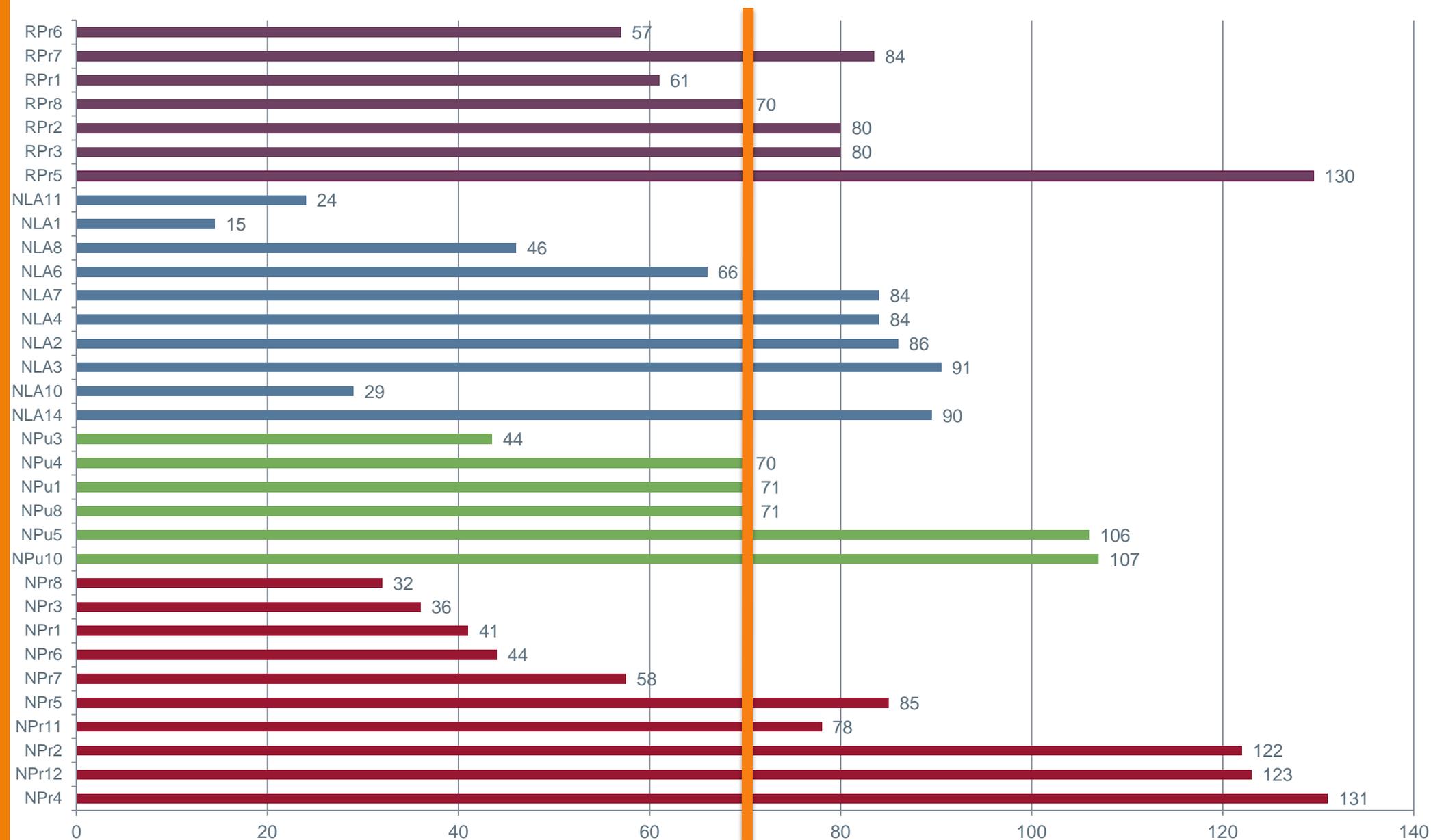
Agenda

- When we evaluated officer performance in 2013, we saw a wide range of results among officers

Visit Analysis: Number of Visits per Officer

Visit Rates are
Well Below Most
Organizations
Targets

Officer Visits for 2013 - Median



70

Introduction

- When we evaluated officer performance in 2013, we saw a wide range of results among officers
 - Number of visits
 - Number of proposals
- We have heard that deans may divert the attention of the officers with “other duties” like events, publications, or focus on major evergreen donors.
- We wanted to test this hypothesis through a survey of management practices, and an analysis of results in 2014
- Assertion – Officers in decentralized shops do worse in “pipeline” activities
 - First time visits
 - First time major gifts
- The results are interesting, although not conclusive
- We intend to take this analysis further based on our conversation today

Survey Methodology

Survey Methodology

- Survey sent out to 29 customers in June and July, including centralized and decentralized organizations
 - Sent to all schools that have separate fundraising units
- 16 responded
 - 12 came back as decentralized
 - 4 came back as centralized
 - Decentralized organizations were asked a set of follow-up questions

Survey Participants

National - Private

University of Dayton
Drexel University
Duquesne University
University of San Francisco
Saint Louis University
Tulane University
University of Southern
California

National - Public

Ball State University
University of Cincinnati Foundation
University of Toledo
University of California - Davis
University of New Hampshire

Regional - Public

College of Charleston

Regional - Private

Abilene Christian University
Gonzaga University
Xavier University

Defining Metrics

- To control for influence of outlier gifts, we use medians to compare institutions
- To control for part-time officers, we use officers >100 prospects assigned
- “Prospect Assignment” is removed from analysis for institutions
 - Who don’t use proposals
 - Or don’t use them in a conventional way
 - These are “nulled” so they don’t influence the averages
- The “Percent of Visits on Evergreens” is at the institutional level, not the officer level

Survey Results

Factor Analysis

We conducted a Factor Analysis on the responses, to see which answers to questions tended to group together.

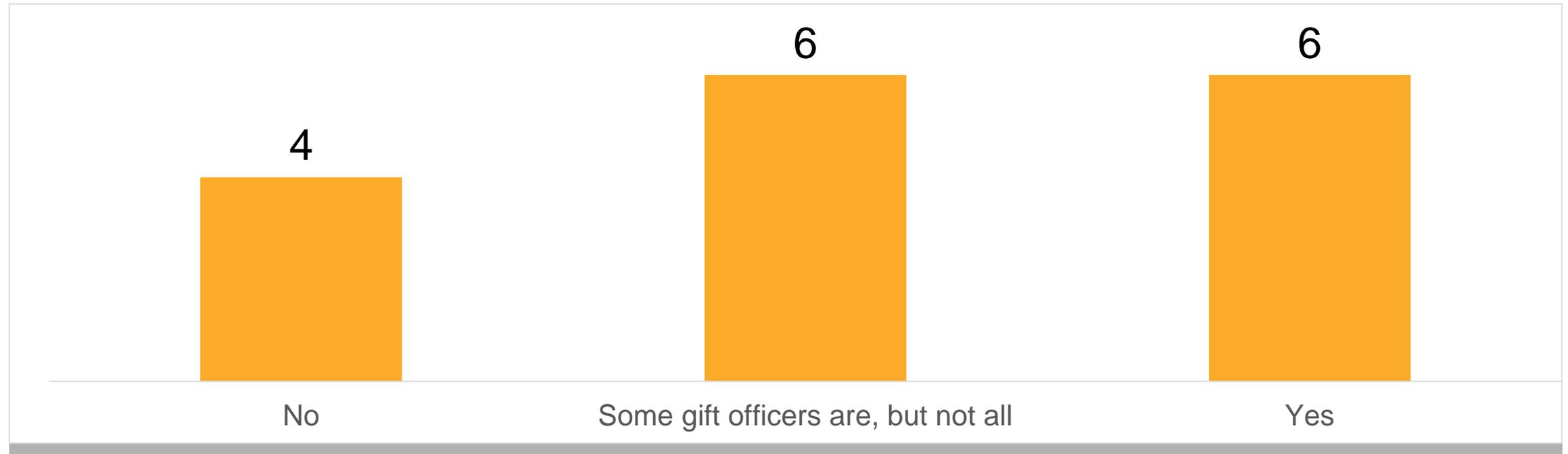
1. Management

1. Hiring of Gift Officers
2. Deans setting goals and expectations
3. Deans involved in performance reviews
4. How closely are schools/units fundraising efforts tied to central's?

2. Funding

1. Schools/units funding central development
2. Schools/units funding assigned gift officers

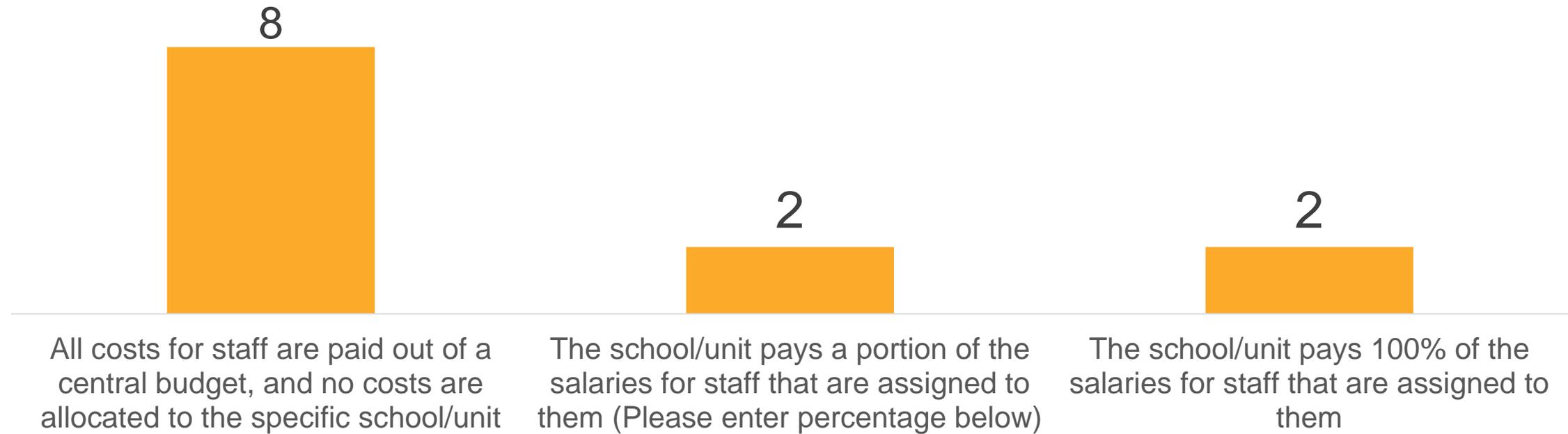
Are gift officers assigned to raise money only for specific schools or units?



	No	Some gift officers are, but not all	Yes
Gift Officer Visits*	78	96	93
Gift Officer 1st Time Visits*	18	28	27
Commitments per Officer*	\$301,566	\$354,853	\$782,396
Prospect Assignments per Officer*	213	160	188
Percent Visits on Evergreens	22%	17%	16%
First Time Visit Percentage	24%	30%	29%

**These are the averages of the median officer for each institution

How do the schools or units fund the gift officers assigned to them?

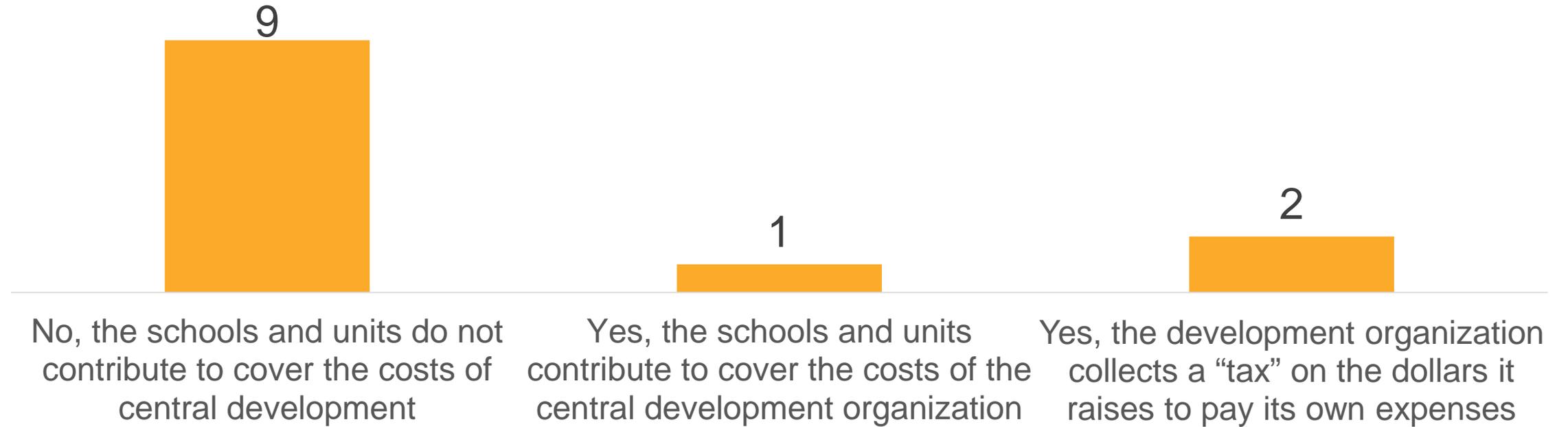


	All costs for staff are paid out of a central budget, and no costs are allocated to the specific school/unit	The school/unit pays a portion of the salaries for staff that are assigned to them (Please enter percentage below)	The school/unit pays 100% of the salaries for staff that are assigned to them
Gift Officer Visits*	86	107	117
Gift Officer 1st Time Visits*	25	23	43
Commitments per Officer*	\$575,597	\$457,946	\$651,416
Prospect Assignments per Officer*	174	210	140
Percent Visits on Evergreens	15%	19%	20%
First Time Visit Percentage	28%	25%	38%

* *These are the averages of the median officer for each institution



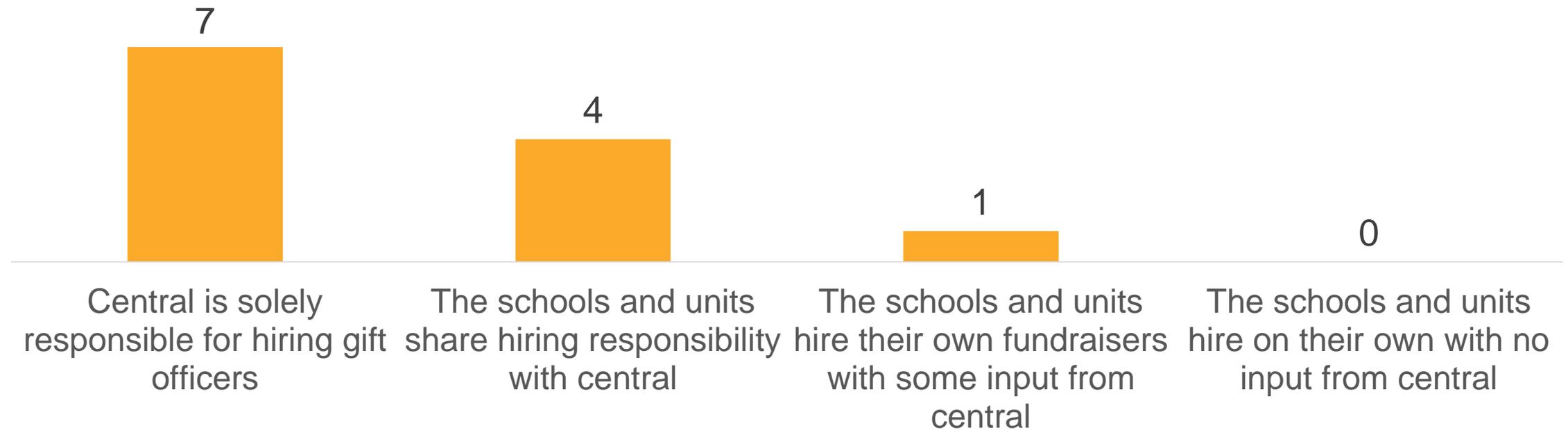
Do the schools and units fund a central development organization?



	No, the schools and units do not contribute to cover the costs of central development	Yes, the schools and units contribute to cover the costs of the central development organization	Yes, the development organization collects a "tax" on the dollars it raises to pay its own expenses
Gift Officer Visits*	89	120	106
Gift Officer 1st Time Visits*	25	32	40
Commitments per Officer*	\$548,485	\$625,405	\$630,863
Prospect Assignments per Officer*	171	148	203
Percent Visits on Evergreens	16%	26%	16%
First Time Visit Percentage	28%	28%	37%

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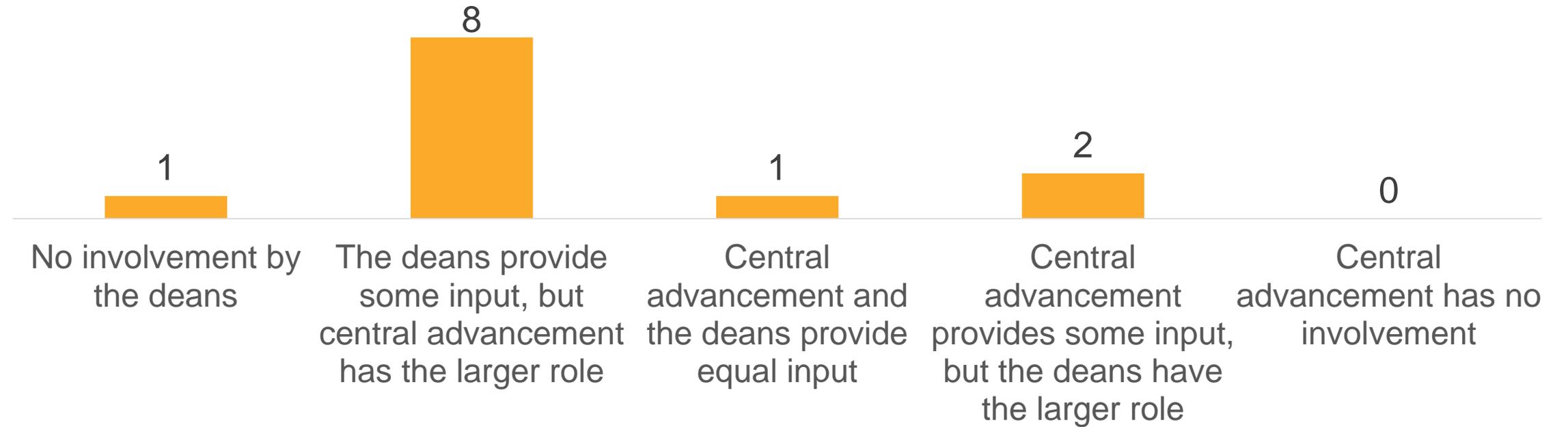
Who is responsible for hiring gift officers?



	Central is solely responsible for hiring gift officers	The schools and units share hiring responsibility with central	The schools and units hire their own fundraisers with some input from central
Gift Officer Visits*	88	100	120
Gift Officer 1st Time Visits*	25	31	32
Commitments per Officer*	\$566,642	\$557,900	\$625,405
Prospect Assignments per Officer*	181	168	148
Percent Visits on Evergreens	15%	17%	26%
First Time Visit Percentage	28%	32%	28%

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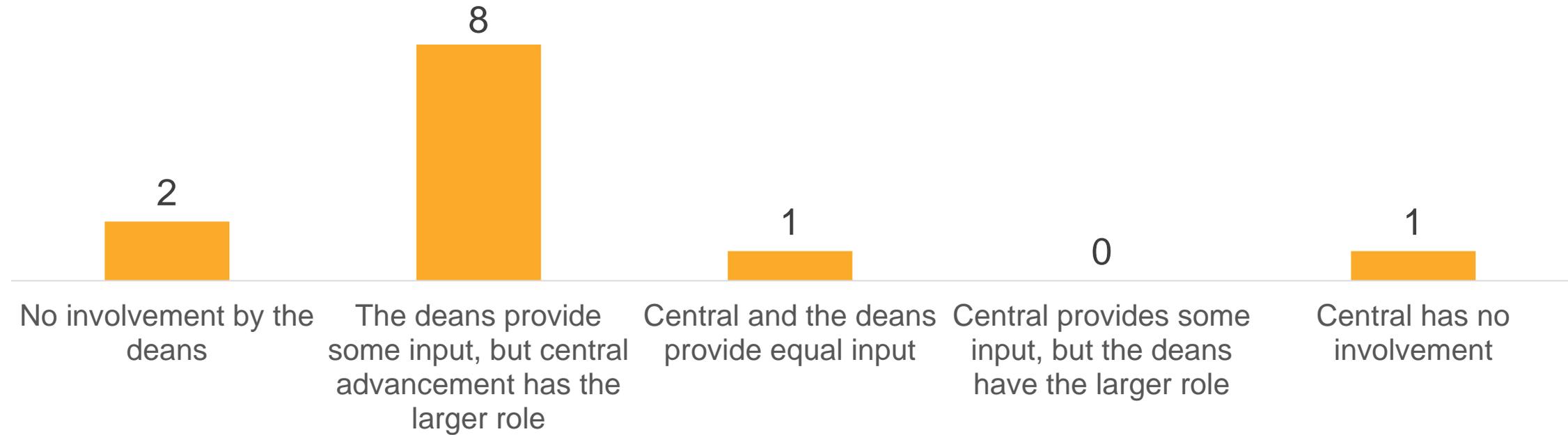
What is the level of involvement by the deans in setting goals and expectations for the gift officers?



	No involvement by the deans	The deans provide some input, but central advancement has the larger role	Central advancement and the deans provide equal input	Central advancement provides some input, but the deans have the larger role	Central advancement has no involvement
Gift Officer Visits*	49	97	89	112	
Gift Officer 1st Time Visits*	10	30	24	30	
Commitments per Officer*	\$311,497	\$597,169	\$679,349	\$527,650	
Prospect Assignments per Officer*	118	178	134	206	
Percent Visits on Evergreens	17%	15%	27%	19%	
First Time Visit Percentage	18%	32%	29%	24%	

* *These are the averages of the median officer for each institution

What is the level of involvement by the deans in performance reviews of gift officers?

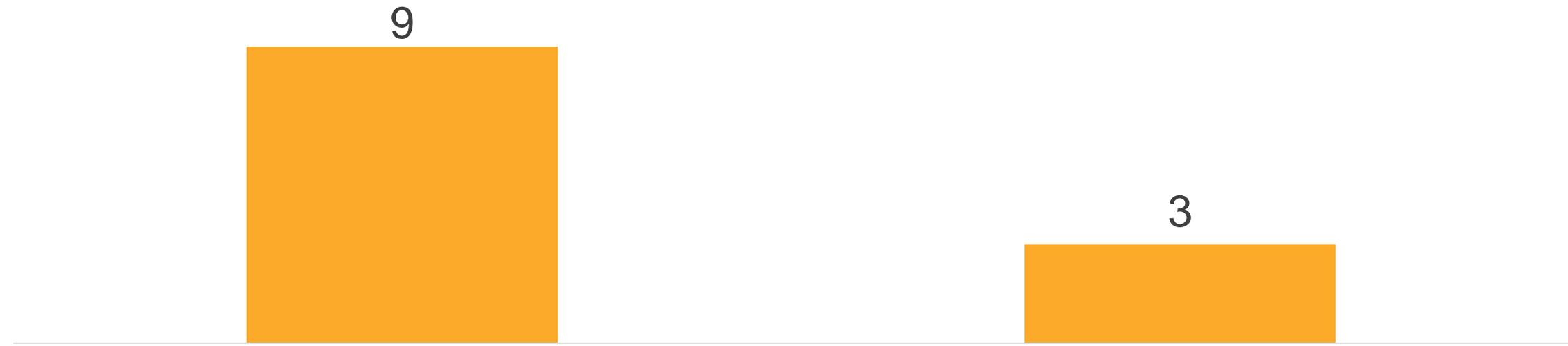


	No involvement by the deans	The deans provide some input, but central advancement has the larger role	Central and the deans provide equal input	Central provides some input, but the deans have the larger role	Central has no involvement
Gift Officer Visits*	90	93	89		120
Gift Officer 1st Time Visits*	26	28	24		32
Commitments per Officer*	\$190,193	\$642,295	\$679,349		\$625,405
Prospect Assignments per Officer*	138	192	134		148
Percent Visits on Evergreens	11%	16%	27%		26%
First Time Visit Percentage	29%	30%	29%		28%

* *These are the averages of the median officer for each institution



Do the deans have a compensation component related to fundraising results?



No

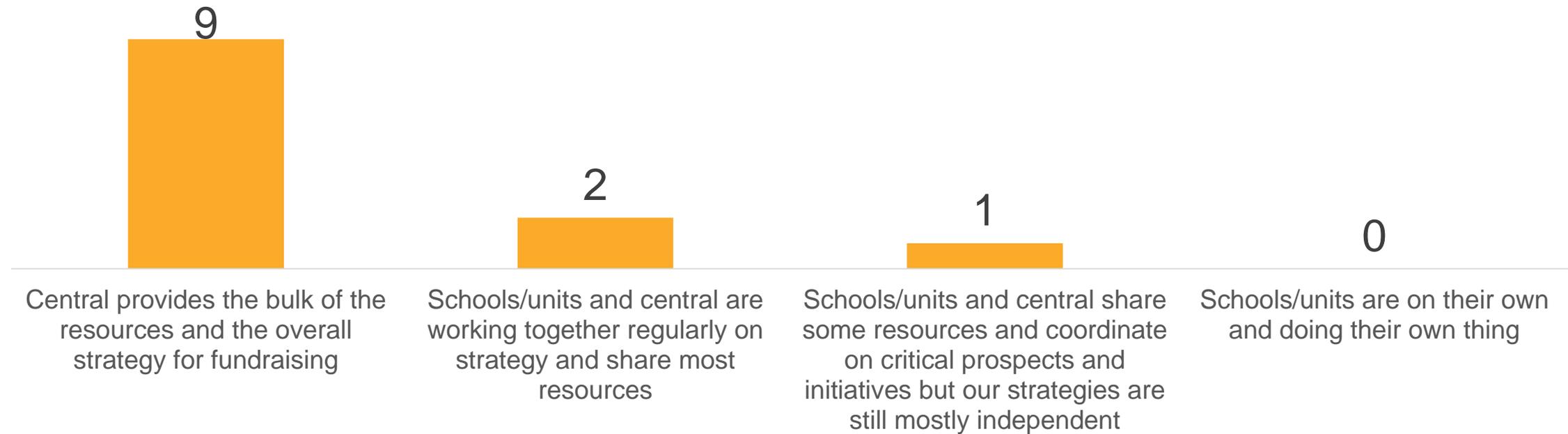
Yes

Gift Officer Visits*	89	112
Gift Officer 1st Time Visits*	24	37
Commitments per Officer*	\$565,641	\$577,576
Prospect Assignments per Officer*	172	181
Percent Visits on Evergreens	16%	18%
First Time Visit Percentage	29%	32%

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As you look across the type of schools on campus, how closely are their fundraising efforts tied to those of central development?



	9	2	1
Gift Officer Visits*	90	102	120
Gift Officer 1st Time Visits*	25	39	32
Commitments per Officer*	\$537,924	\$678,389	\$625,405
Prospect Assignments per Officer*	186	133	148
Percent Visits on Evergreens	15%	21%	26%
First Time Visit Percentage	28%	38%	28%

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Other Factors that May be At Work

- Controlling for wealth of constituents
- Controlling for sophistication of central infrastructure
- Controlling for expected value of constituents
- Insufficient number of comparable institutions (need more survey respondents)
- Other thoughts?

Thank You.

