Practice articles

Just asking: How and why Northwestern University established a system of fundraiser accountability metrics

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Abstract

In 2011 Northwestern University (NU) began to implement a system of fundraiser accountability metrics in response to the launch of its US$3.75bn campaign. Within three years, the establishment of this system catalysed a cultural change within the university's development office. Emphasis moved away from visit and contact activity and towards solicitations, under the philosophy that focusing officers' energies on making major gift asks was the most effective way of ensuring major gift commitments and dollars raised, and therefore campaign success. NU's officers exhibited less territoriality and had a more energised approach to portfolio management. Senior leadership had access to concrete data about organisational and individual progress towards campaign goals, and NU's development office set internal records for the number and amount of major gifts raised.

Keywords

fundraising, metrics, accountability, data, campaign

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INTRODUCTION

In 2011 fundraisers at Northwestern University faced a dilemma. The launch of a US$3.75bn campaign meant that they would be asked to raise money on a larger scale at a faster pace than ever before; however, paradoxical as it may seem for people whose jobs consist of raising money, they had functioned up to then in a development culture that offered little incentive to make major gift asks. The quiet phase of NU's current university-wide campaign began in September 2011, with a public launch scheduled for March of 2014. To ensure success, senior leadership set aggressive goals for each school and programme area along with the mandate that they should be prepared to account for progress towards them. These goals and mandates required fundraising teams to be visionary in a way to which they were unaccustomed. They needed to be prepared to report on progress towards goals in the traditional sense (dollars raised, number of donors, that is, participation rates), but that kind of reporting told only part of the story. They also had to think backwards from their teams' fundraising goals and prove that they had an established path towards campaign success — a solicitation pipeline grounded in reality, with specific strategies and action plans in place to move donors forward through the solicitation cycle and realise major gifts from them.

Is that not the essence of what fundraisers do, one might ask? And if so, what is the dilemma? The answer to the first question is an emphatic 'yes'. The answer to the second provides the narrative arc of NU's fundraising story. In a very short period of time, NU's development office recognised the need to shift to a solicitation-focused system of fundraising and reporting for which few tools and resources existed, and for which few gift officers were mentally prepared. In the old culture, data chaos reigned supreme and a constant flurry of non-strategic fundraising activity disguised the fact that it did little more than churn through a large and ever-revolving door of prospects while moving few gift conversations forwards. The new proposed culture would shift each fundraiser's attention towards the small number of prospects for whom he had developed active solicitation plans and require him to be accountable in hard data for each.

The idea of implementing a system of fundraiser accountability metrics was an abstract one in those early days of 2011, and the response from fundraisers ranged from cautiously optimistic to outright resistant. Within three years, once teams began shattering fundraising records, there would be few remaining frontline staff at NU who were not full advocates of the system.

THE REIGN OF DATA CHAOS

In Northwestern's Alumni Relations and Development division, a fundraising team exists for each undergraduate and professional school and a handful of non-academic programme areas. In addition, the office deploys a number of central teams whose assignments depend on regional markets, size or complexity of gift and/or, in the case of its Gift Planning team, on the vehicle for giving. Prior to 2011, if one asked a dozen gift officers from across these various teams to explain who established their fiscal year goals, let alone how, one would be likely to receive a dozen different answers. Or rather, the dozen answers might have been consistent in their lack of consistency. No comprehensive dollar goal informed individual team goals, or at least not one based on a strategic analysis of institutional needs set against the health of the university's prospect pool. Some gift officers had no clearly defined fiscal year goals or established their own goals; goals that did exist placed primary emphasis on the number of visits. Officers were rewarded for activity, regardless of the end result of that activity, as if simply going on visits would magically result in closed gifts. And no strict policies required that an officer record even the activity that did occur in any central repository, meaning that officers could get by with anecdotally updating supervisors on their work throughout the year and take advantage of a 'good faith' system of feedback.

While the description above may sound critical of NU's senior leadership and development staff in place at the time, the intent is not to disparage them. Many brilliant fundraisers who worked for NU at that time continue to do impressive work on behalf of the university. Rather, this specific state of affairs as it existed at NU before 2011 highlights some general facts about human performance in the workplace.

1. People will adapt their behaviour according to the behaviour being measured.
2. Knowing that their behaviour will be made transparent to supervisors or peers will increase the incentive to behave successfully.
3. Behaviour that results in rewards will be repeated.

Before 2011 managers rewarded officers for meeting visit goals; therefore, officers focused their energies on meeting visit goals. It is as simple as that.

Unfortunately and despite their best intentions, this approach to goal setting negatively impacted portfolio and pipeline management. Officers focused on the quantity of visits; as a result, they naturally brought the same philosophy to portfolio management, believing they were poised for success in meeting visit goals only if they earmarked for themselves as many prospects as possible. The result was large, unfocused portfolios, filled with the highest capacity prospects but not structured in any meaningful way, and most importantly not reflective of any actual solicitation activity occurring. The average major gift officer carried a portfolio of between 150 and 200 prospects, but actively managed only a small percentage of these. The best prospects were assigned; they were not necessarily managed. Because these best prospects sat in portfolios, however, they were off-limits to officers who might have had the bandwidth to cultivate them. Fundraisers figuratively planted flags to reserve prospects that they might or might not ever actually approach, resulting in a culture of hoarding and territorial behaviour — a culture antithetical to success during a major campaign.

THE CASE FOR FUNDRAISER METRICS

Why establish metrics? The answers to that question may be obvious, yet many fundraising organisations continue to do business without them or, like NU, have only recently implemented them. Some organisations know that they should implement metrics but are unsure how to do so. Others possibly meet with resistance driven either by fundraisers and/or by senior leadership. Not everyone at NU embraced the idea of an accountability system, and among those who most opposed the concept, common themes emerged that are likely to be consistent across institutions that have explored similar initiatives. Some felt that metrics would create an unhealthy culture of competition among officers and create counter-productive distractions. Others feared that metrics would discourage collaboration and create an 'every man for himself' attitude among fundraisers. Still others objected to what they perceived to be the reduction of a complex and relationship-based art form into cold, clinical numbers that could never tell the whole story of any one relationship between officer and prospect.

NU leadership expected these objections and understood the anxiety driving them. After all, one unstated — unstated at least to those being measured — but very real motivation for establishing performance metrics is to ensure that officers justify their own existence. Fundraisers are, in a word, expensive. In addition to salary and benefits, one gift officer costs an organisation travel expenses not incurred by staff in non-frontline roles. Add to that the expenses incurred by any employee of virtually any organisation (office space, supplies, seat licenses to databases and other resources, administrative support), and add to *that* the less quantifiable soft expenses specific to supporting frontline staff (time and resources of research, prospect management, gift services and analytics teams). Furthermore, this list does not even account for training, classes and other professional development offerings in which an organisation might invest in order to cultivate its talent. At a bare minimum, a gift officer should be bringing into his organisation at least more than the organisation spends to keep him on the staff. Metrics quickly illuminate which fundraisers are underperformers, and since those fundraisers most likely already know they are underperforming, they naturally express angst about a system that will transparently highlight their deficiencies. Even high-performing fundraisers may balk slightly at having their performance quantified in numbers and ranked against their colleagues. For this reason, an emphasis on the benefits to individual officer portfolios and teams emerged as the persuasive catalyst for justifying the need for a transition to a metrics culture.

In conveying the implementation of metrics to frontline staff, the clarity and focus such a system would bring to their work became a key tool in highlighting the system's merits. At the individual level, metrics liberate officers from unwieldy, stagnant portfolios. They offer fundraisers the freedom to let go of prospects to whom they may be assigned but for whom they do not have strategic solicitation plans in place. While nearly all officers traditionally found comfort in large portfolios and initially expressed anxiety about eliminating large percentages of their assigned prospects, those same officers almost unanimously expressed relief after the trimming had taken place and felt reenergised by a sense of clear directive they in many cases felt for the first time. Metrics eliminated a stressor officers only realised existed after it was no longer there to cause them stress. Fundraisers could now develop actionable plans for the prospects to whom they were assigned and, even better, actually execute those plans — a rewarding alternative to combing continually through a morass of unknown prospects.

While officers benefited individually from portfolio reprioritisation, the advantages trickled down — or up — to the macro level. As officers relinquished some of NU's most highly qualified prospects to the unassigned pool because those officers did not have the bandwidth to effectively move them, analysis of and discussion about that pool occurred which allowed the fundraising office to make decisions about its true quality and viability. Were these newly unassigned names good prospects who had gone uncultivated because of placement in over-stuffed portfolios? If so, what action plan might be developed that would increase the likelihood of establishing a relationship? Or, conversely, had these prospects been sitting stagnant for good reason, that reason being that they were never good prospects to begin with? In these cases, downgrading or disqualifying them in the central donor database prevented them from appearing subsequently on the lists of top prospects.

This pool analysis did not always result in making progress on quality prospects who had previously lain fallow in portfolios, but it did always result in learning useful information about these prospects that informed strategies in the future. Metrics allowed a methodical fine-tuning of NU's prospect pool and campaign pyramid, increasing the value of projections based on that pyramid.

To make these arguments and win fundraising teams over to the idea of using hard data to track their performance, no better ally existed than — what else? — hard data.

OUT WITH THE OLD, IN WITH THE NEW

Officers can simply be told that metrics are the new norm without any justification for their necessity. Likewise, portfolio reduction policies can be enforced without making the case that smaller portfolios increase a fundraiser's success rate. Cultural transitions should be positive when possible, however, and gift officers should feel that they own the process to an appropriate degree. Metrics implemented correctly set gift officers up for success rather than merely revealing their flaws. For these reasons, hard data are critical in illustrating to gift officers not how unproductive they are, but rather how much more productive they could be with manageable, strategic portfolios.

To make this case, NU senior managers in partnership with advancement services teams gathered data on major gift portfolios across NU's development office to develop a set of averages which would summarise the rate and quality of portfolio activity. The analysis excluded corporate and foundation relations, as well as work happening at the principal gift level (US$5m and above). Data points gathered included such portfolio characteristics as size, contact and visit activity (tracked as contact reports), and solicitation activity (recorded as proposal data). The results disappointed but did not surprise. Rather, they supported the hypothesis: officers kept busy, but they kept busy with tasks other than asking for gifts. The average major gift officer carried 118 prospects in his portfolio but contacted 37 (31 per cent) of them during fiscal year (FY) 2011. Fundraisers contacted on average 93 prospects to whom they were not assigned. In other words, the average gift officer spent two-thirds of his time reaching out to prospects to whom he was not assigned while ignoring those in his portfolio. Most alarmingly, major gift officers solicited an average of seven individuals, a number that dropped to three when excluding the Feinberg School of Medicine, which had a much larger solicitation rate than any other team and was something of a data anomaly for a variety of reasons.

The following conclusions emerged from this analysis of portfolio averages.

1. Major gift officers carried too many prospects to effectively manage them.
2. Nearly half of NU's top prospects sat ignored in portfolios.
3. Fundraisers made too few solicitations, or they did not enter their solicitations in the database — a problem either way.

These conclusions supplied the necessary justification to call for an overhaul of fundraiser portfolios and a reorientation of officers' priorities on solicitation work.

As a first step towards this new process, NU's senior leadership partnered again with its advancement services teams to formalise proposal data policies and embark on an outreach campaign to educate officers about where, when and how to record their planned asks. Over several months, officers met individually with managers and representatives of the Prospect Research and Management team for a thorough review of solicitation data. In these meetings, officers received consultation, training and technical support towards the objective of synchronising ask activity in the database with the reality of the officers' solicitation work. The portfolio reduction efforts discussed previously occurred as part of this process. Although this outreach programme required a significant time commitment from both fundraising managers — especially those who managed multiple teams — and Prospect Research and Management, it reaped significant dividends in data quality and relationship building. In addition to the previously mentioned benefits of mental relief and renewed focus that came with manageable portfolios, officers experienced a new-found feeling of control over their proposal data, something not to be underestimated when one considers that the data became a virtual calendar of their planned fundraising activity.

This portfolio housecleaning laid a solid foundation on which gift officers could build their solicitation work. Portfolios that had previously contained as many as 200 prospects now contained 30–40 names for whom a concrete solicitation plan existed. Crucial to combined objectives, these solicitation plans were recorded in the donor database. With this groundwork in place, formal rollout of the metrics system began.

WHAT AND HOW TO MEASURE

Each organisation will decide for itself what metrics it most values. The decision will ideally be driven by an overarching institutional goal that can then be translated into individual goals, giving each fundraiser clear expectations about his role in contributing to the final outcome. NU leadership wanted more than anything else to incentivise gift officers to make major gift solicitations. Of course the ultimate goal was monetary, but major gift commitments and major gift dollars will naturally follow an aggressive emphasis on making major gift asks, and that philosophy provided the underlying structure for crafting NU's metrics. Visit activity, the data point that had historically served as the primary measure for NU fundraisers, has its uses as a metric, but senior leaders deemed it significantly less important than solicitation activity. One visit that results in a major gift solicitation is worth more than five visits that do not, and visit activity alone provides little insight into a fundraiser's work when not in the context of ask activity. To avoid a cumbersome, unwieldy and overcomplicated process, NU resisted the temptation of tracking too many data points. It also designed the process to acknowledge the hierarchy of importance among its metrics; the system rewards officers more heavily for major gift solicitations than it does other work that might be related to managing their portfolios. Much of the work that naturally comes with being a major gift officer plays no role in metrics at all; it is seen as necessary to the job but is not tracked or factored into officers' ultimate performance goals.

After this consideration of the organisation's specific needs and the culture it wanted to foster, NU's development office chose to track five metrics:

1. number of major gift solicitations (asks made);
2. number of major gift commitments (gifts closed);

3. dollar amount of major gift commitments (money raised);
4. number of visits;
5. number of qualification visits (acknowledging that NU's prospect pool is disproportionately heavy on discovery prospects).

A sixth metric, proposal assists, recognises collaboration between officers by acknowledging situations in which one officer provides assistance to another during a solicitation. No goals are set for this metric, and it scores below any of the others, essentially offering an officer bonus points towards his overall progress without allowing it to have a significant impact otherwise. Figure 1 provides an example of NU's accountabilities grid, a matrix used to assign goals to fund-raising staff based on their positions. Because goals are specific to role, an apples-to-apples comparison of success towards goals becomes possible across all job titles. One can compare the relative performance of an executive director to an associate director, not by counting the number of asks made by one versus the other, but rather by how close each came to meeting his target goals for the year. Supervisors can assess the relative performance of officers whose specific duties may differ.

Figure 2 illustrates the metrics score card and the hierarchy NU uses to weight one metric against another. Achieving 100 per cent of a yearly goal towards any one metric wins the officer a perfect score; 100 per cent across all metrics earns an officer a score of 100. The number of major gift commitments and asks carries the highest scores. Therefore, an officer's best chance to meet his yearly goal is to solicit a large number of major gift prospects. Under this system, an officer receives more credit for solicitations — even if those solicitations result in a 'no' — than he does for raising a certain number of dollars or securing a certain number of visits.

Position	Associate Vice President	Executive Director of Development	Regional Director of Major Gifts / Senior Director of Development		Director of Development / Director of Major Gifts		Senior Associate Director of Development	Associate Director of Development	Assistant Director of Development
Management Responsibilities	*YES*	*YES*	*YES*	*NO*	*YES*	*NO*	*NO*	*NO*	*NO*
Number of Major Commitments ($100K+)**	5	5	6	7	6	7	6	5	2
Number of Solicitations ($100K+)**	9	9	12	14	12	14	14	12	6
Dollars Raised (Commitments of $100K+)**	*$15M*	*$7.5M*	*$5M*	*$6M*	*$4M*	*$5M*	*$1.5M*	*$1M*	*$500K*
Visits (face-to-face)	40	40	70	80	70	80	90	100	120
Qualification Visits (Subset of Overall Visits)	10	10	20	30	20	25	40	50	75

FIGURE 1 Accountabilities grid
Note: ** Does not matter which unit a gift supports

TENTATIVE FY13 Score Card	Number of Major Commitments	Number of Solicitations	Dollars Raised	Number of Qualifications	Visits	TOTALS
200% or more of Goal	91	50	36	13	10	**200**
175-199% of Goal	80	47	34	12	9	**182**
150-174% of Goal	71	40	29	11	8	**159**
125-149% of Goal	62	34	25	10	7	**138**
101-124% of Goal	53	28	20	9	6	**116**
100% (Achieve Goal)	44	25	18	8	5	**100**
75-99% of Goal	36	22	16	7	4	**85**
50-74% of Goal	27	16	11	5	3	**62**
25-49% of Goal	18	9	7	2	2	**38**
1-24% of Goal	10	3	2	1	1	**17**
0% (No Activity)	0	0	0	0	0	**0**

Secondary Solicitations (Proposal Assists)	TOTALS
>10 asks	20
8-9 asks	14
6-7 asks	10
3-5 asks	6
1-2 asks	4
No Activity	0

FIGURE 2 Metrics scorecard

To understand how NU's metrics and scoring system might work in a real-life situation, one can refer to Figures 3 and 4, which together provide a hypothetical scenario meant to recreate one of the many combinations of data that might manifest themselves in actual fundraising settings. Figure 3 summarises the fiscal year goals and the year-end actual totals for a team of major gift fundraisers. A casual glance may suggest that John, the associate vice president, is the team's top performer. He raised more money than any other officer and exceeded his own dollar goal for the year. At the other end of the spectrum, Amanda raised the least and came in below her goal. Under the less formalised system of officer accountability previously in place at NU, in which officers simply needed to meet a visit goal in order to do well, officers like Cindy, Daniel, Mary and Kevin would have thrived, while Kevin and Shannon might have been perceived as underperformers.

When one overlays NU's metrics scores over these year-end numbers, however, the story changes. Figure 4 inserts the score earned for each metric based on accomplishment of respective goals. Now it becomes clear that John, who raised more money than any other officer on the team, actually scored the lowest. Although he exceeded his goal for dollars raised, those dollars were the result of one or two large asks. He fell well below his solicitation and commitment numbers. John closed a big gift or two and made no more asks for the year. Amanda, on the other hand, who raised the least amount of money, is among the

FY13 Goals/Totals		Commitments		Solicitations		Major Gift $$		Visits		Qualification Visits		BONUS
Title	Fundraiser	Goals	Count	Goals	Count	Goals	Count	Goals	Count	Goals	Count	Proposal Assists
Associate VP	John	5	2	9	4	$7,000,000	$12,000,000	30	25	15	7	3
Executive Dir.	Shannon	5	6	10	10	$5,000,000	$4,200,000	40	35	20	12	4
Sr. Dir. w/ mgmt	Cindy	5	4	12	10	$3,500,000	$3,750,000	80	100	20	35	9
Sr. Director	Daniel	6	3	14	16	$4,000,000	$2,700,000	90	100	25	35	5
Director w/ mgmt	Mary	5	10	12	20	$2,500,000	$3,000,000	100	120	30	35	4
Director	Dennis	6	8	14	16	$3,000,000	$2,750,000	120	105	50	55	5
Sr. Associate Dir.	Kevin	7	8	16	25	$1,500,000	$1,600,000	120	113	50	20	4
Associate Dir.	Amanda	7	6	16	20	$1,000,000	$750,000	120	135	50	90	9

FIGURE 3 Hypothetical fundraiser goals

FY13 Goals/Totals		Commitments			Solicitations			Major Gift $$			Visits			Qualification Visits			BONUS		Total Score
Title	Fundraiser	Goals	Count	Score	Goals	Count	Score	Goals	Count	Score	Goals	Count	Score	Goals	Count	Score	Proposal Assists	Score	
Associate VP	John	5	2	17	9	4	16	$7,000,000	$12,000,000	24	30	25	6	15	7	7	3	3	73
Executive Dir.	Shannon	5	6	27	10	10	24	$5,000,000	$4,200,000	16	40	35	6	20	12	8	4	3	84
Sr. Dir. w/ mgmt	Cindy	5	4	23	12	10	22	$3,500,000	$3,750,000	20	80	100	9	20	35	14	9	7	95
Sr. Director	Daniel	6	3	20	14	16	26	$4,000,000	$2,700,000	14	90	100	8	25	12	7	5	3	78
Director w/ mgmt	Mary	5	10	39	12	20	32	$2,500,000	$3,000,000	20	100	120	8	30	35	11	4	3	113
Director	Dennis	6	8	30	14	16	26	$3,000,000	$2,750,000	16	120	105	6	50	55	11	5	5	94
Sr. Associate Dir.	Kevin	7	8	27	16	25	32	$1,500,000	$1,600,000	20	120	113	6	50	20	7	4	3	95
Associate Dir.	Amanda	7	6	23	16	20	29	$1,000,000	$750,000	16	120	135	8	50	90	14	9	7	97

FIGURE 4 Hypothetical scorecard

top performers. Although she missed her commitment goal by one, she exceeded her solicitation goal. She solicited many prospects, albeit some without success. This system highlights the efforts of persistent officers like Amanda who are not shy about making asks. The officers like John who meet their target dollar goals because of a home run solicitation, or who meet visit goals without strategically using those visits to line up solicitations, will not excel.

THE RESULTS

If hard data are the best way both to justify the need for metrics and to subsequently track them, why not also use hard data to measure their impact?

Implementation of Northwestern's fundraiser performance metrics began in FY2012 (1st September, 2011 through 31st August, 2012). FY2013, however, marks the first complete year of collected data under the metrics system, and a comparison of numbers on either side of the boundary between FY2012 and FY2013 offers a compelling success story (see Figure 5). In FY2011, pre-metrics, NU's development office secured 129 major gifts, a number consistent with the two previous fiscal years. In FY2012, the year in which the organisation began to implement metrics, it raised 184 major gifts — a 43 per cent increase in fund-raising performance. In FY2013, the first full year of fundraising with metrics in place, the number of gifts raised jumps to 225, a 22 per cent increase from FY2012 and a 74 per cent increase from FY2011 — certainly numbers to please senior development staff. The game-changing number appears in FY2014, however, after fundraisers had been managing their work for an ample amount of time under the new system. In FY2014, NU raised 330 major gifts, a 47 per cent increase from just the year before, and an attention-grabbing 156 per cent increase from the

FIGURE 5 Fundraising results

period before any formal system of metrics existed. In FY2015, the number had dropped back down to 297, lower than the previous year but still well above even the first full year of metrics, let alone pre-metrics years (and it should be noted that although NU realised fewer major gifts in FY2015, it raised more major gift dollars than in any previous year).

To assess the impact of metrics on NU's fundraising mission even more exactly, one should consider this comparison across FY2012 through FY2014 of 20 major gift officers who had both been in their position for at least one year and in a fundraising role at Northwestern for that time span.

- This focus group of fundraisers increased the number of their major gift solicitations by 170 per cent.
- They increased their number of major gift commitments by 211 per cent.
- Most notably, they increased their dollar amount raised from major gifts by 595 per cent.
- Additionally, in FY2014, nine of 15 school/programme fundraising offices set records for the number of major gifts from individuals, and eight of 15 school/programme teams raised a record amount of major gift dollars.

Juxtaposing pre- and post-metrics fundraiser performance data has supplied both senior leaders and fundraising teams with tangible evidence that metrics have improved overall progress. Those who built the process and played a role in smoothing the transition to it, however, learned some anecdotal lessons about what works and what does not when establishing a culture of officer accountability that is not as easy to quantify. Below are additional lessons learned that are less about numbers and more about culture and behaviour.

- Goals that are too high create anxiety, whereas goals that are too low do not motivate.

- Clearly defined goals improve morale among fundraisers.
- Gift officers become more purposeful in their work and time management.
- A culture of smaller, strategic portfolios reduces territorial behaviour among fundraisers.
- Managers have better tools with which to keep abreast of their officers' progress towards goals.
- Increased transparency and consistency now require managers to be more accountable for addressing varying levels of performance and expectations.
- Decision makers can more easily gain acceptance for the idea that solicitation activity can and should be increased.
- The system encourages fundraisers to follow a gift to closure regardless of which unit it supports, creating a more cohesive and collaborative relationship between teams.

CONCLUSIONS

The change in culture to a metrics-driven fundraiser accountability system was not exactly easy, but neither was it exactly difficult. Establishing a clear need for an accountability system by illustrating the inefficiencies of existing portfolio management across teams played a crucial role in making gift officers comfortable with the transition as long as data was presented to them constructively and positively, focusing not on the lack of progress under the existing system but instead on the potential for progress under the new one. As implemented at Northwestern, metrics have allowed fundraisers to see the value in focusing energy on the prospects they manage rather than on other prospects they could be managing. Consistently reliable data can now be used to inform decision making. Officers have become less territorial and less concerned about how large their portfolios are or are not — anxiety about lack of prospects diminishes when an officer is focused on a dozen asks for the year. Fundraising at NU is now focused, exciting and energised. Development staff come to the office every day with the satisfying knowledge that, through everyone's combined efforts, they have positioned the institution for success, not only in its current campaign, but beyond.