



The PULSE of Donor Relations Survey Results and Observations



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

While conceptualizing the “Pulse of Donor Relations” over two years 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. Now, two years later we are on our second version of this essential study of the profession. I am inspired by the growth of our profession and the codification of it into the Four Pillars of Donor Relations.

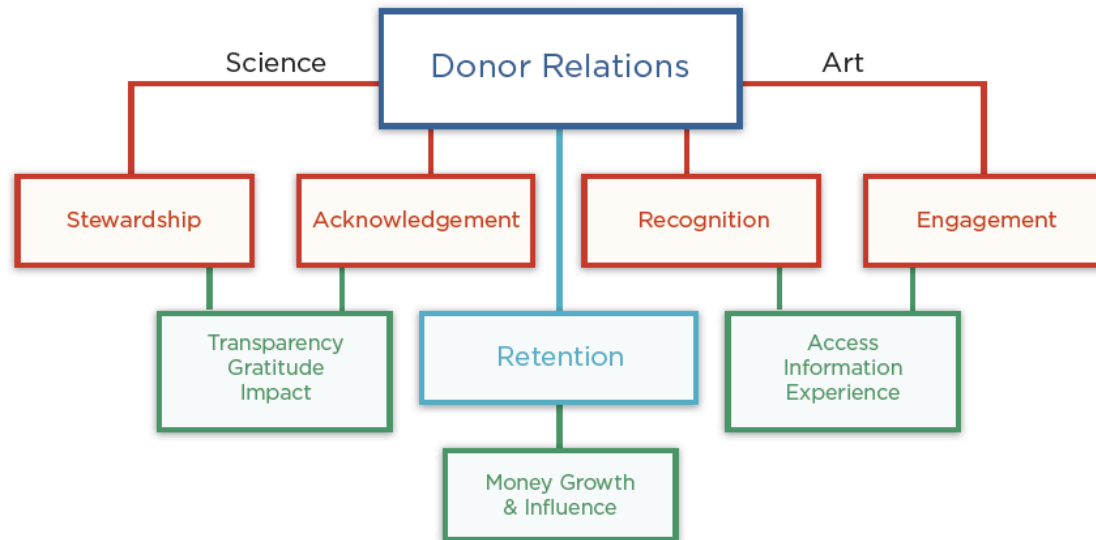
Our profession continues to become more diverse and more strategic and we still have a ways to go. As we look at these responses, I used some of the same questions from 2013 in order to have direct comparisons and then added new questions, something I will continue to do again in 2017. We need to constantly look to evolve and move our profession forward, to help others understand the importance of the movement and to bring others into our fabulous field.

In order to expect different results from our donors, we have to measure and expect different things from our fundraisers. Where is the metric for hand written notes and thoughtful gestures? We have tons of metrics for proposals delivered and gifts closed, for qualifying visits and increases in donations... Wouldn't it be great if we also had metrics for retention and loyalty. I'm not suggesting that everyone is doing it wrong, I'm suggesting that we may be placing too high of a value on getting the next new gift, not appreciating and valuing the ones we do have.

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 the University of Maryland who has been my silent partner in this project from its inception.

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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.



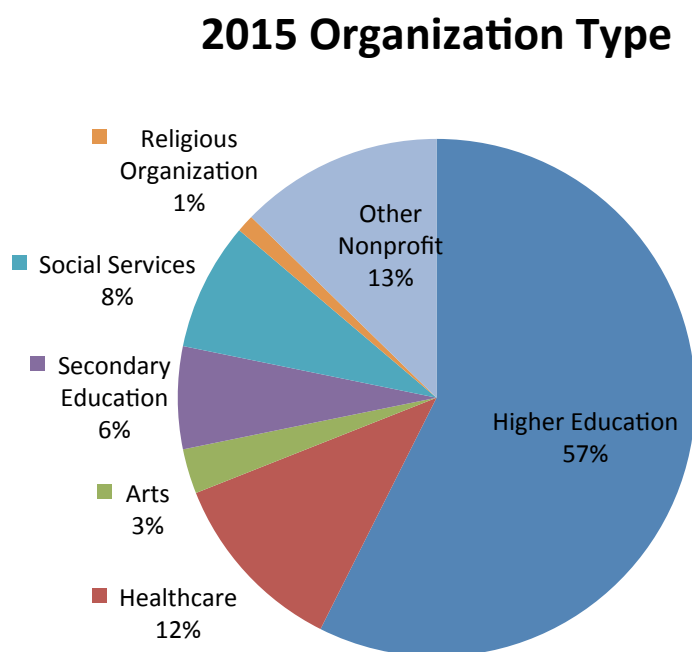
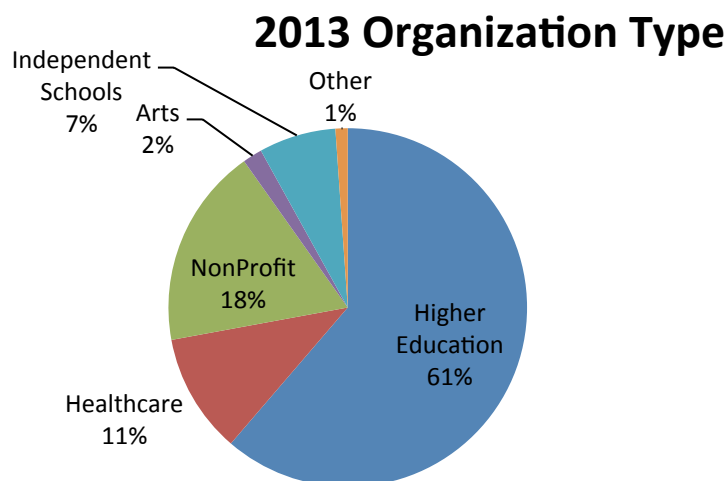
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The following categories represent the survey in a format that is more easily digestible sections over the following pages.

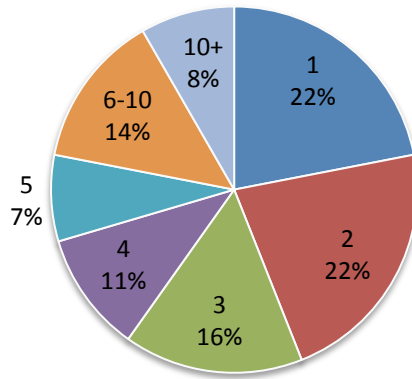
- ABOUT YOUR ORGANIZATION -PAGES 4-8
- ABOUT YOU -PAGES 8-14
- SALARY DATA -PAGES 14-19
- ACKNOWLEDGMENTS -PAGES 19-23
- REPORTING -PAGES 23-32
- RECOGNITION -PAGES 33-40
- GIFT AGREEMENTS -PAGES 41-43
- EVENTS -PAGES 44-47
- METRICS AND PLANNING -PAGES 48-52
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ABOUT YOUR ORGANIZATION:

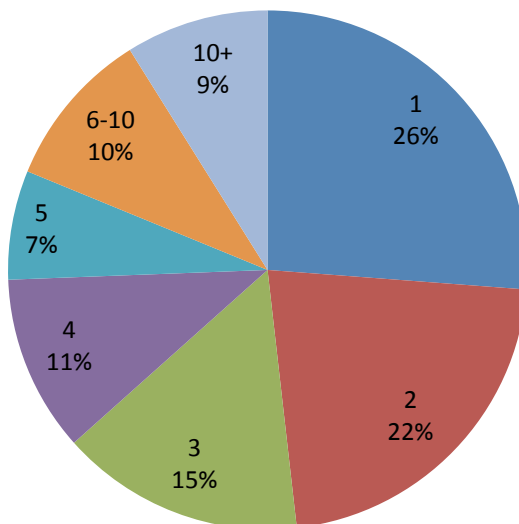
From large hospitals to small independent secondary schools, organizations represented in the Pulse of Donor Relations survey are diverse and varied as are the number of their staff. The importance is in the simplicity of the message: donor relations has had a wonderful coming out party and is hitting its stride. How do we go about raising more awareness for our profession? As you can see from the comparison by year, the makeup and ratio of donor relations to fundraising has not shifted dynamically in two years.



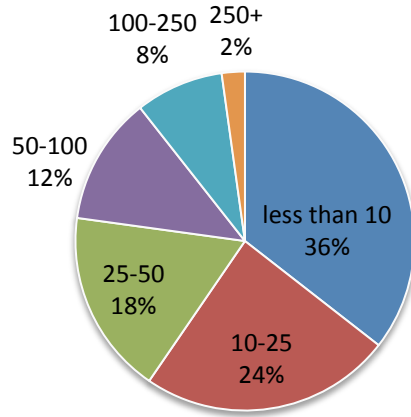
2013- How many staff members (including yourself) work in donor relations at your organization?



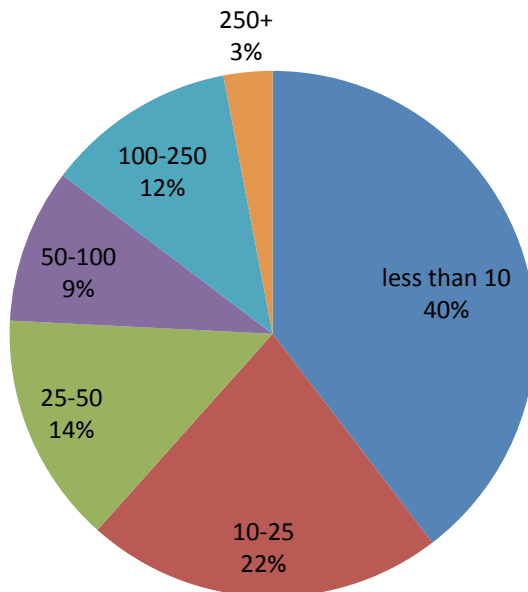
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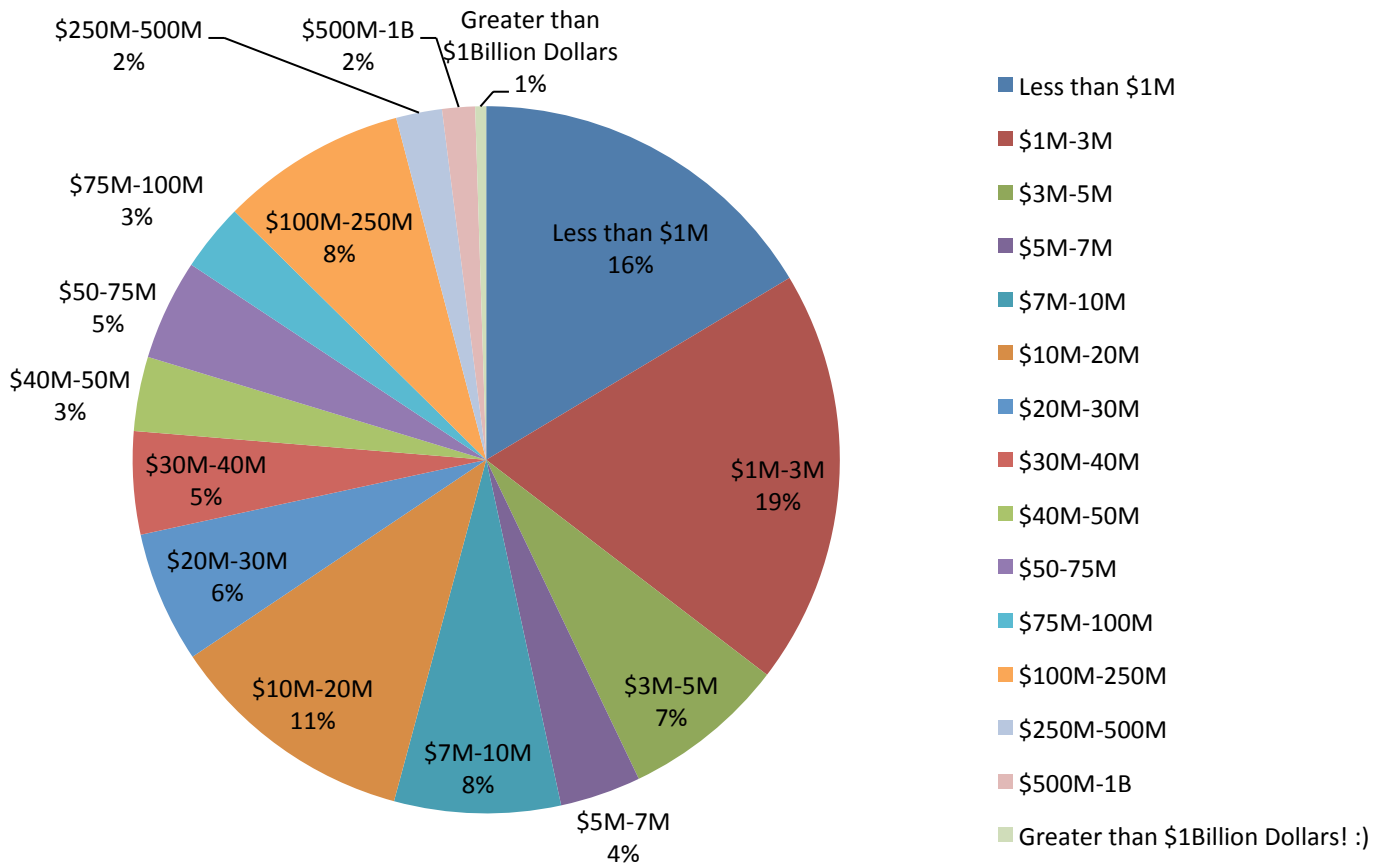
**2013- How many staff are in your fundraising/
advancement operation or division at your
organization?**



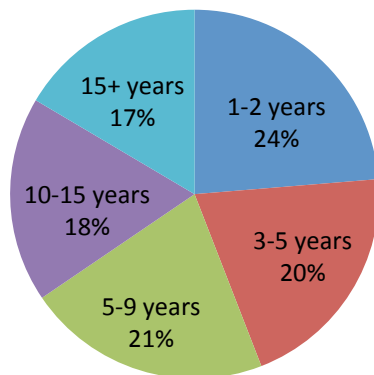
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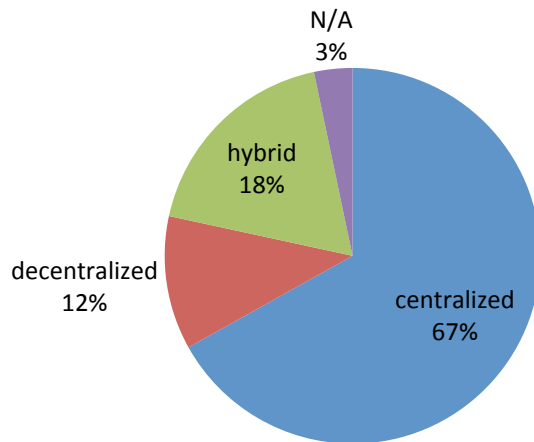
2015 What is the current amount your organization raises each year?



2015 How long has formalized donor relations existed at your organization?



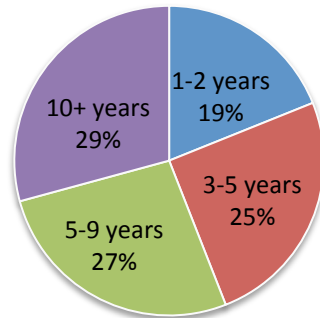
Is donor relations at your organizations centralized or decentralized? Meaning is all of your donor relations handled and staffed centrally or are there donor relations professionals in other areas, branches, units, colleges etc.



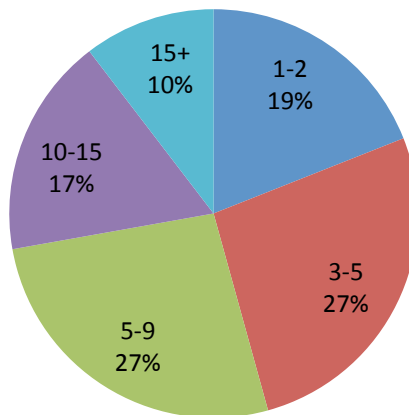
ABOUT YOU:

The numbers here have not change dramatically, although we have now acknowledged those in the profession longer than 15 years in a separate category. 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 where the average lifespan is 16 months in their current position. 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.

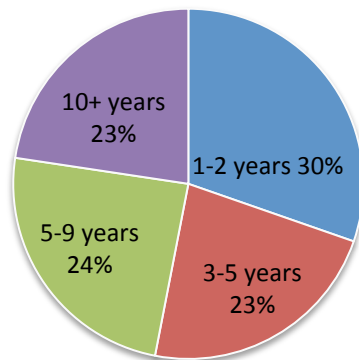
2013 How many years of experience do you have in donor relations?



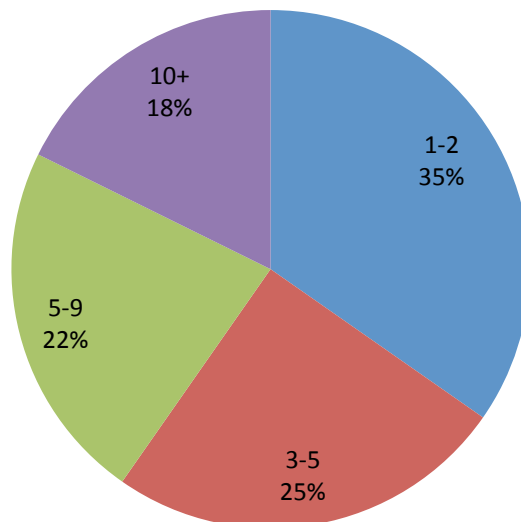
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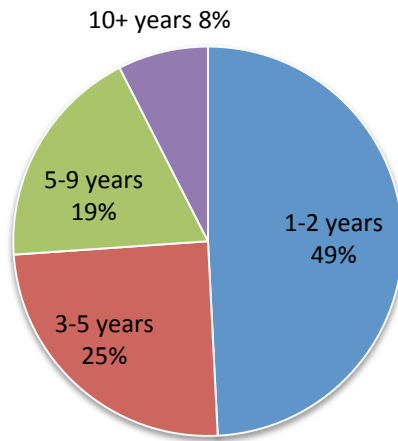
2013 How many years have you been at your current organization?



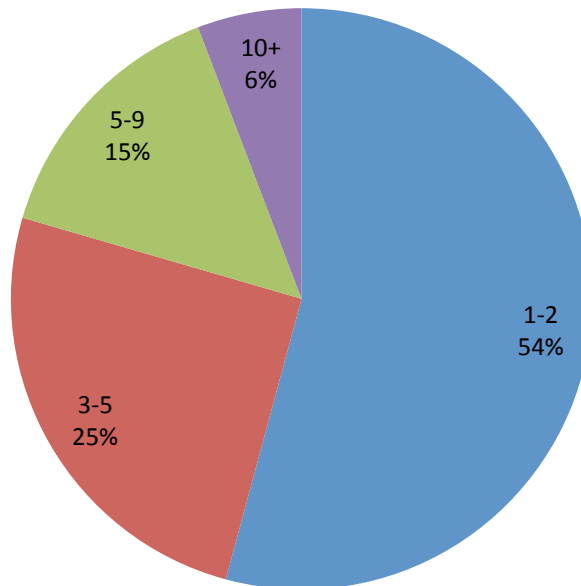
2015 How many years have you been at your current organization?



2013 How many years have you been in your current position?



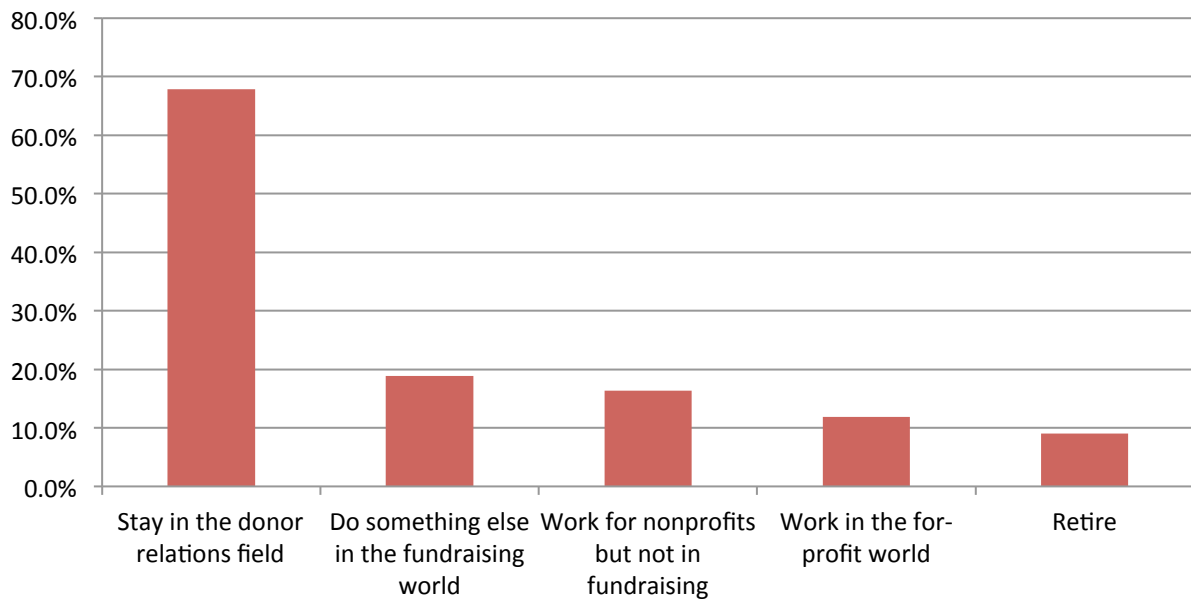
2015 How many years have you been at your current position?



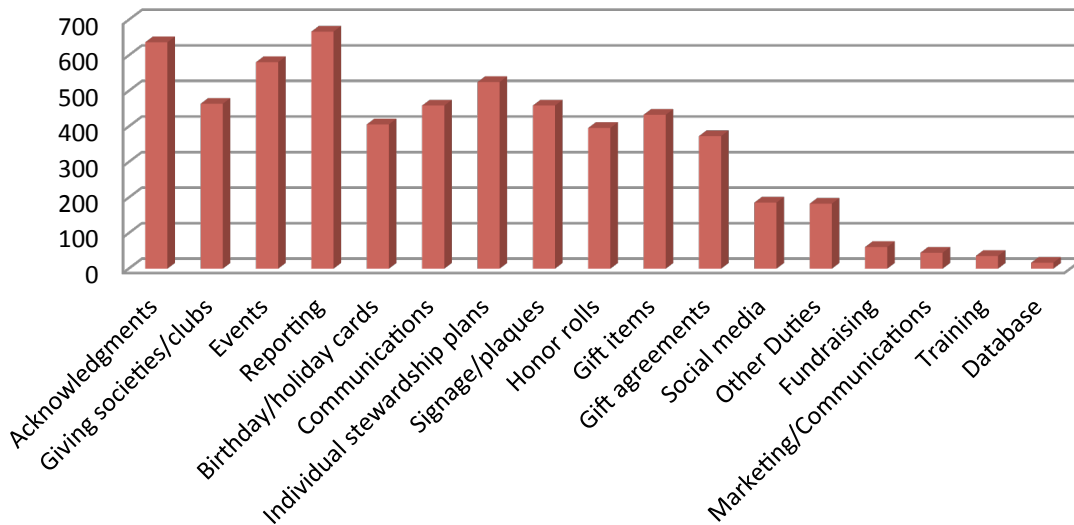
2013 In the next five years, would you like to...



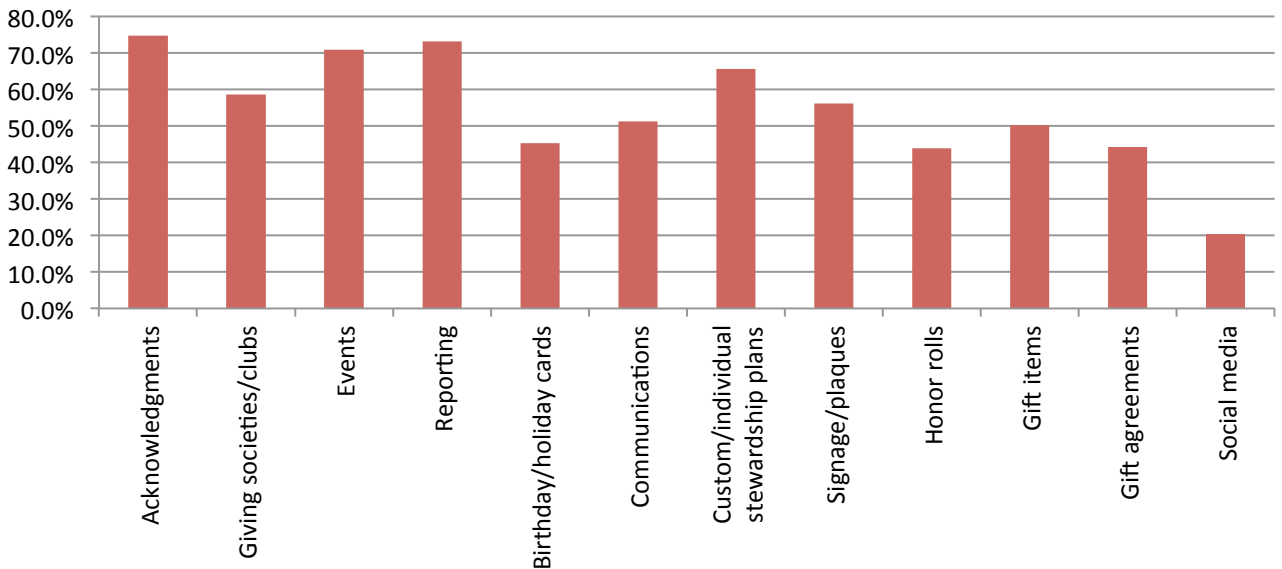
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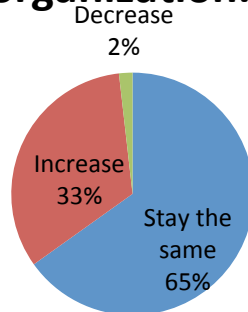
2013 All Duties You Are Responsible For



2015 All duties you are responsible for:



**2015 In the next two years, will the number
of FTE for donor relations at your
organization...**



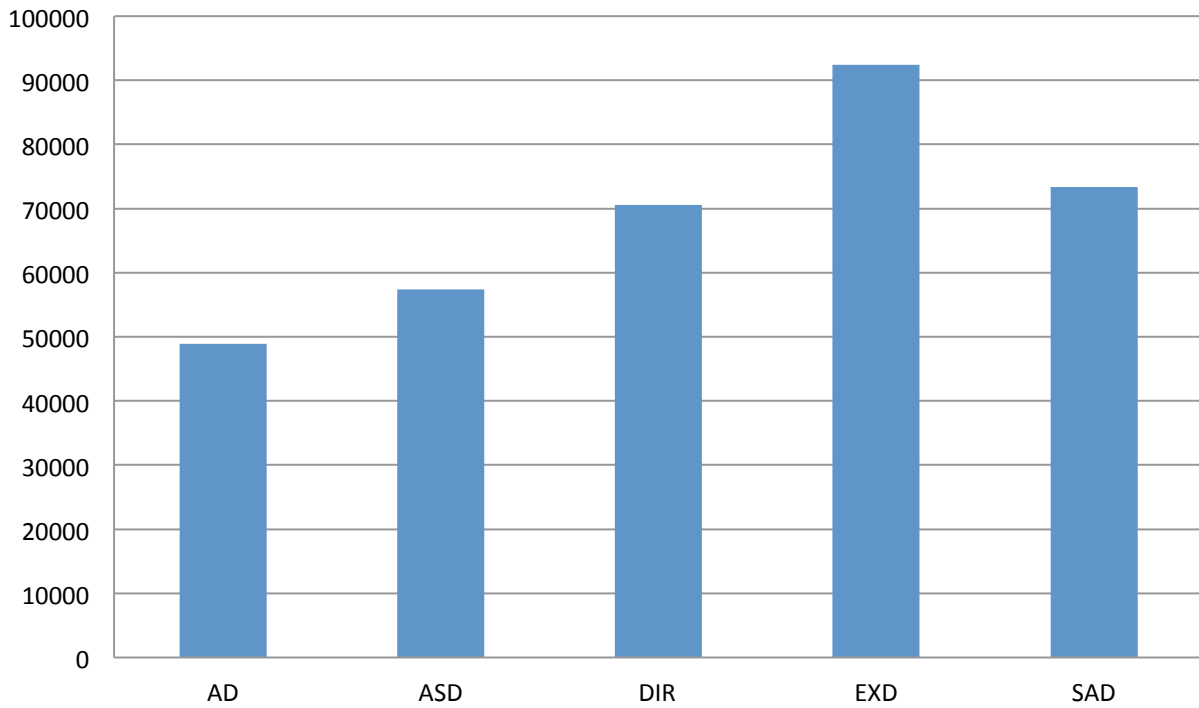
SALARY DATA:

Many have been waiting with baited breath, underpaid and overworked (at least from our perspective), for the salary data that follows. We did our best to provide accurate data and interpretation, counting mostly those with direct donor relations responsibilities in their portfolios. We have used averages and trends here, but also have specific data. 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.

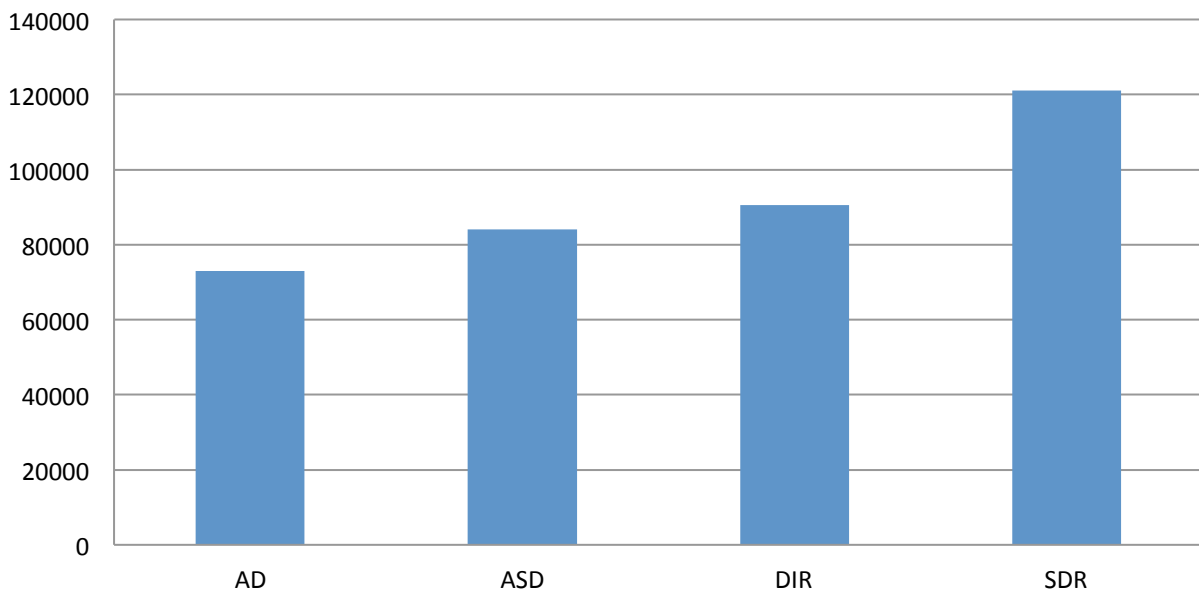
This chart will help you interpret titles as abbreviated in the graphs. If you would like more specific salary data, please let me know and I can try to drill down to your exact needs.

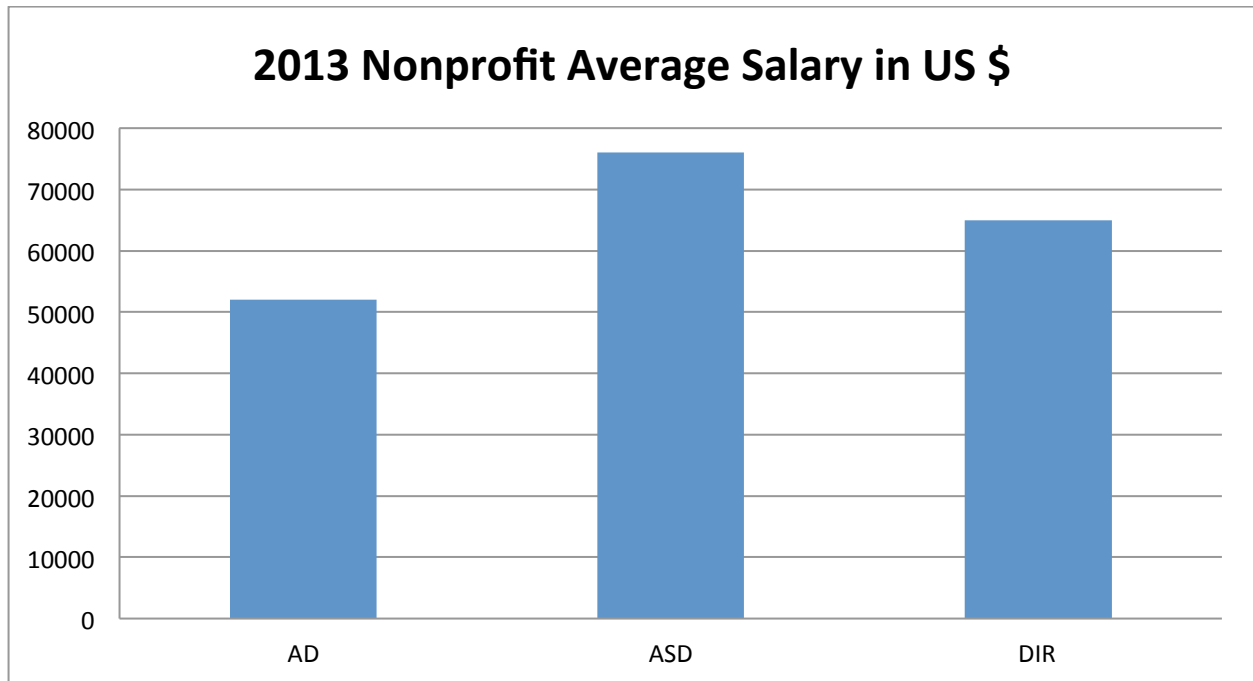
AD=Assistant Director
ASD=Associate Director
DIR= Director
EXD=Executive Director
SAD=Senior Associate Director
SDR= Senior Director

2013 Higher Education Average Salary in US \$

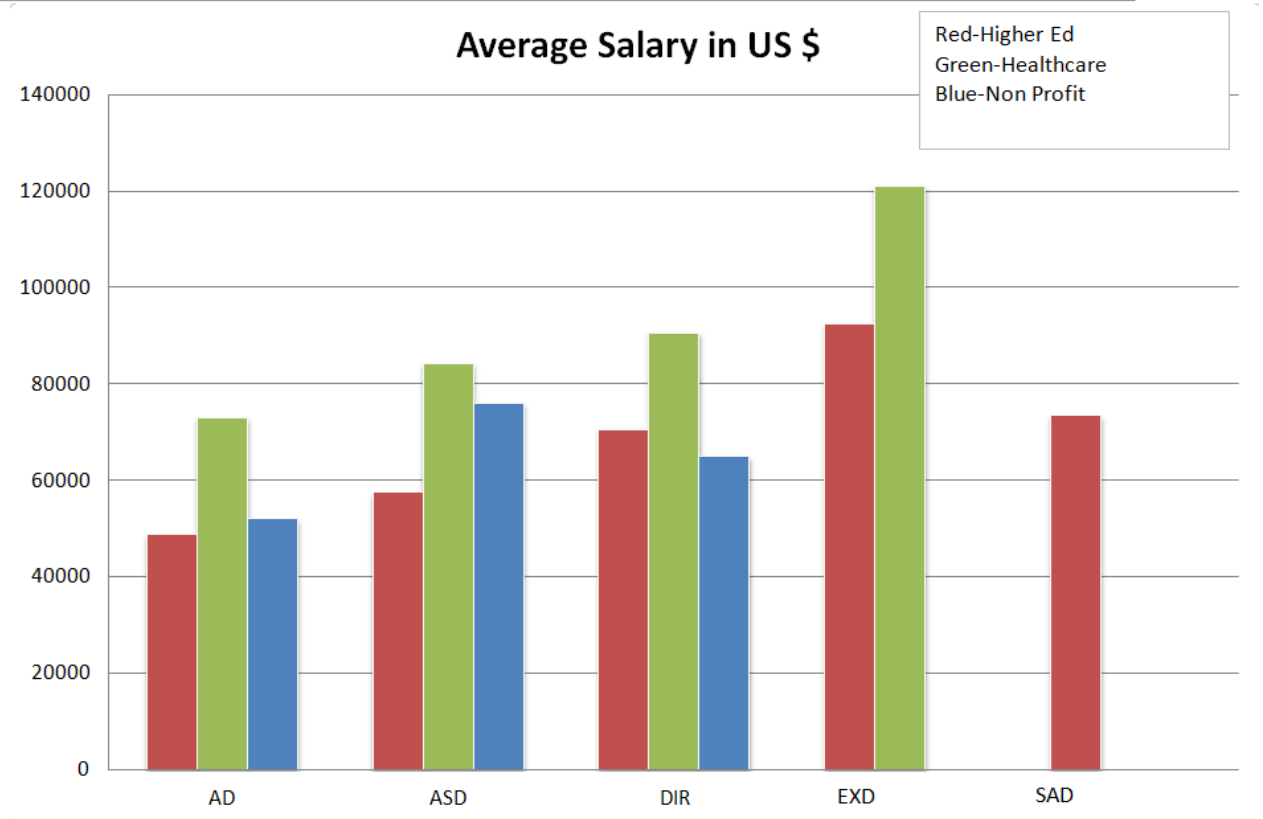


2013 Healthcare Average Salary in US \$

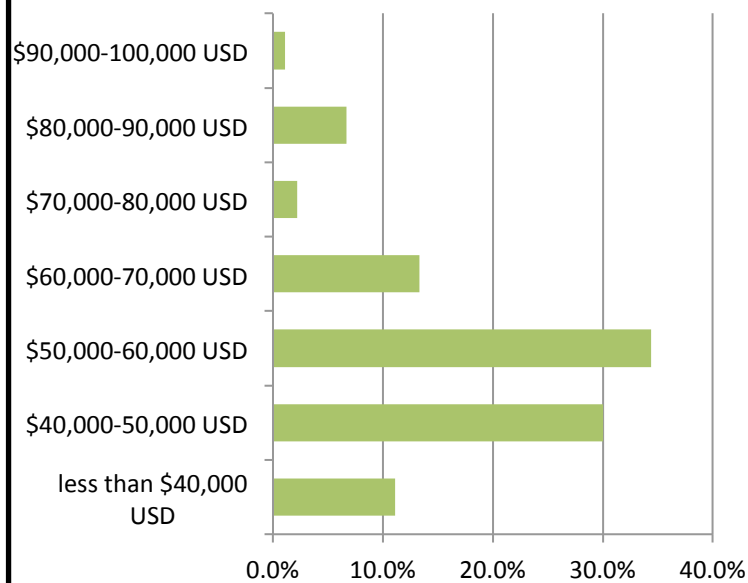




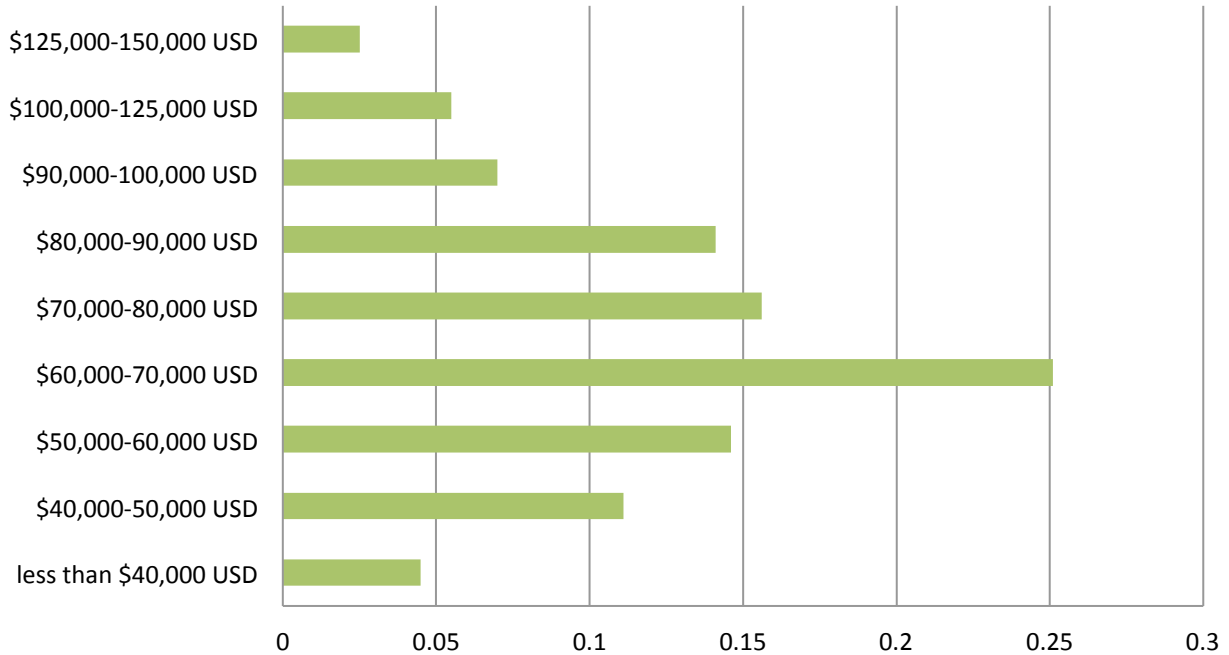
2013

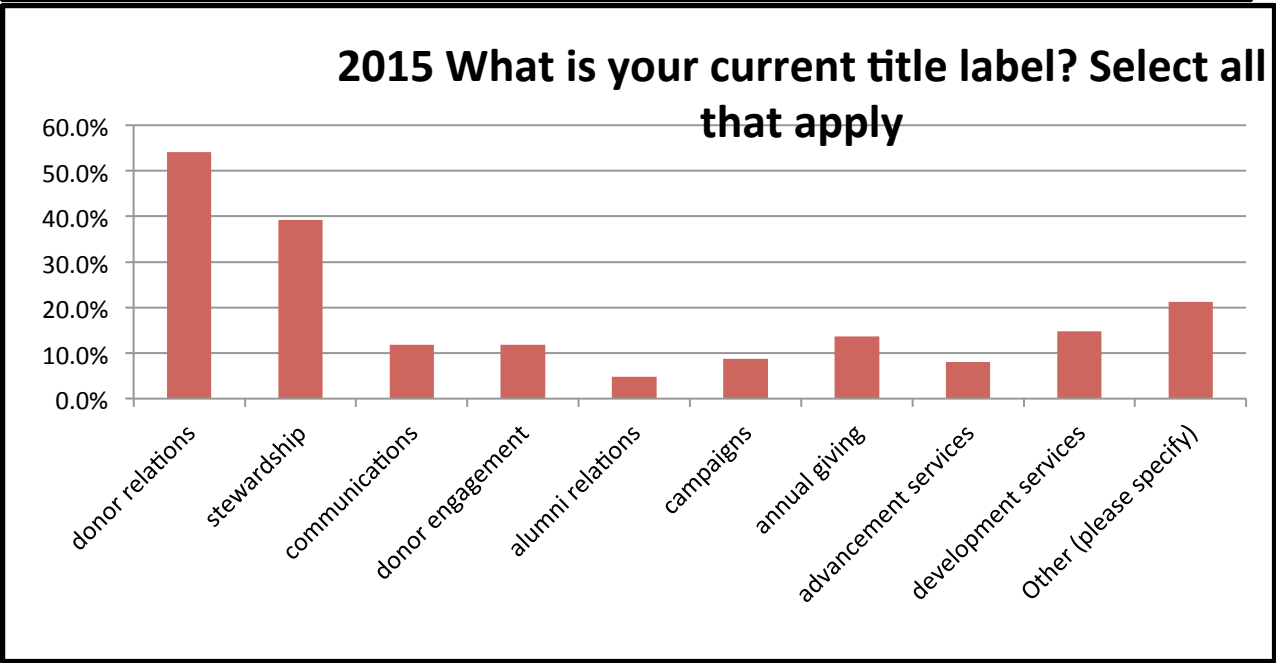
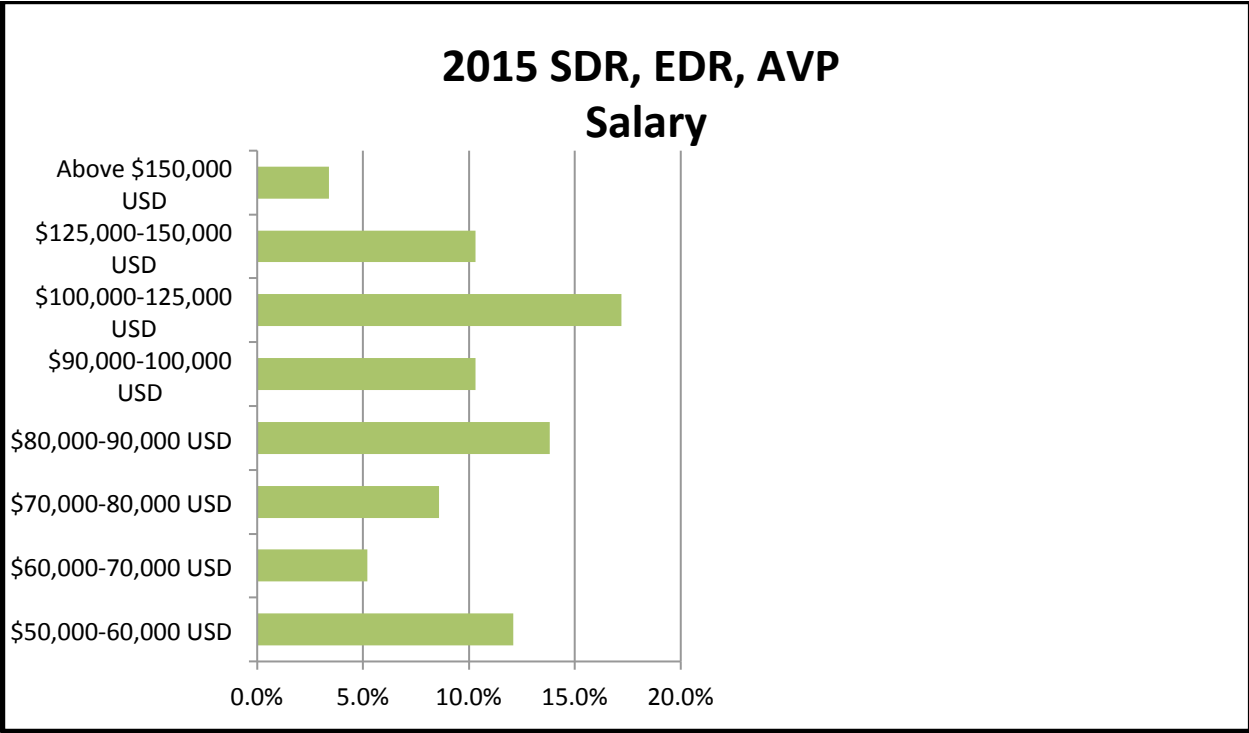


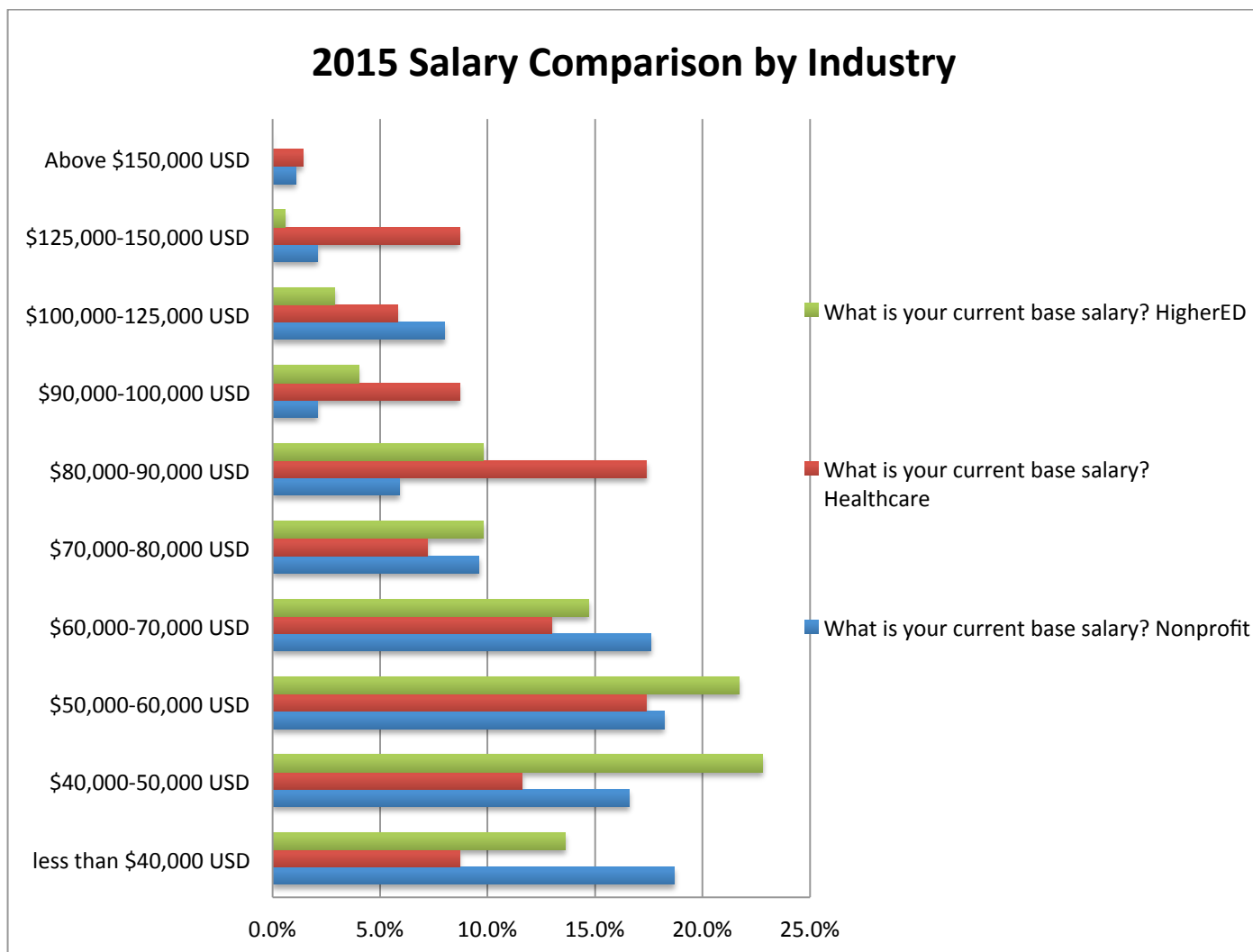
2015 ASD and AD Salary



2015- Director- Salary



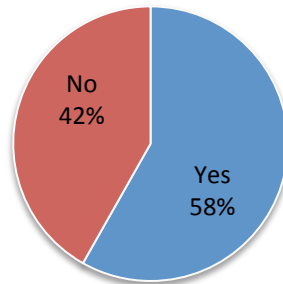




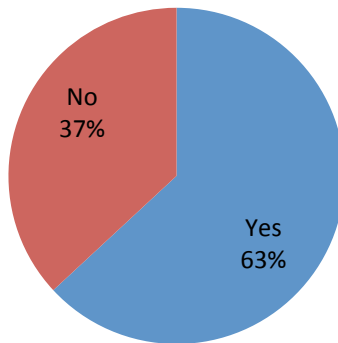
ACKNOWLEDGMENTS:

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. While many of us – 84% -- are diligent in producing timely thanks, a week or more delay among others is damaging 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!

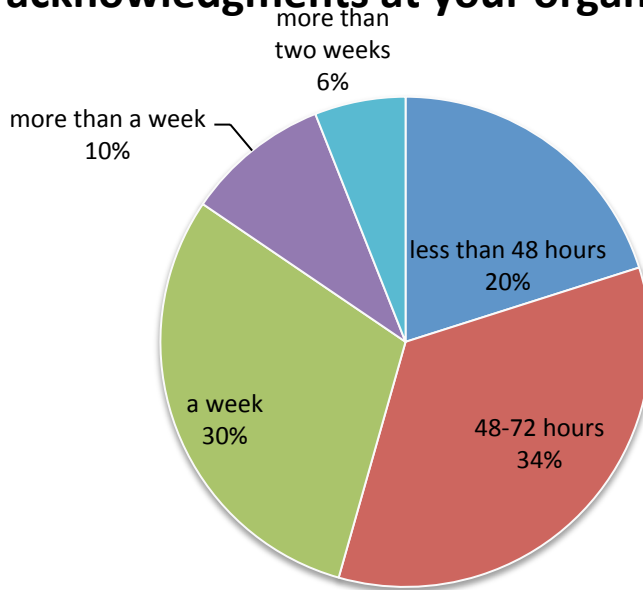
2013 Are the acknowledgments separate from gift receipts at your organization?



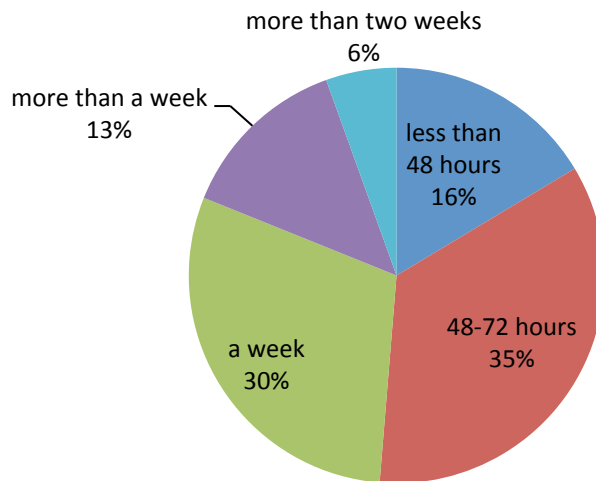
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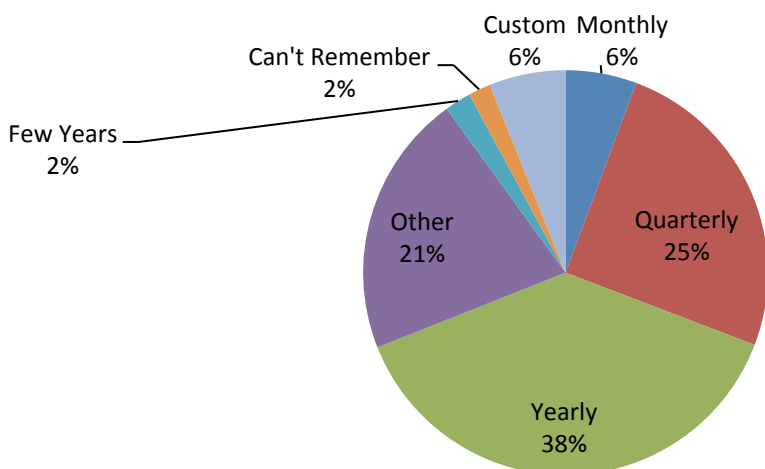
2013 What is the average turnaround time for acknowledgments at your organization?



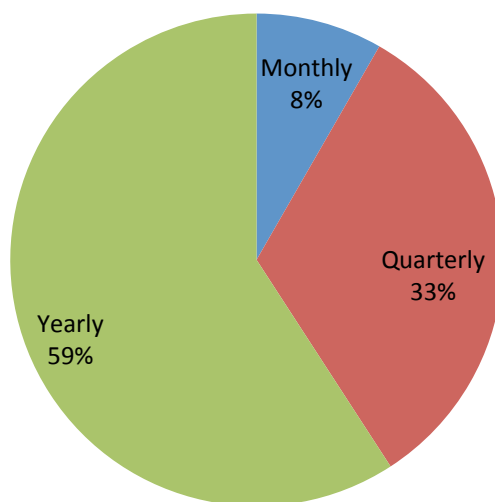
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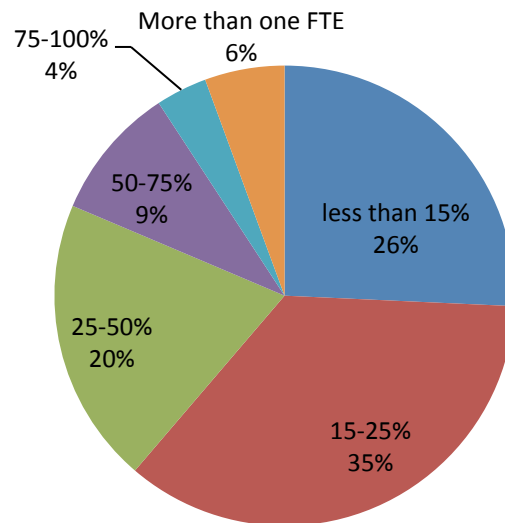
2013 How often is the acknowledgment template letter refreshed at your organization?



2015 How often is the acknowledgment template letter refreshed at your organization?



2015 How much of a full time staff member's FTE do acknowledgments take?

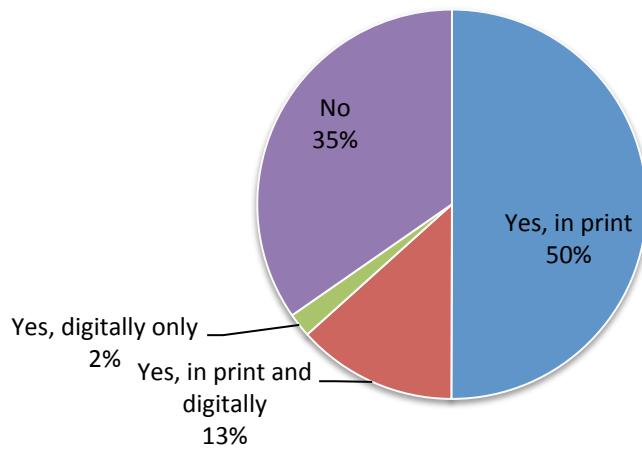


REPORTING:

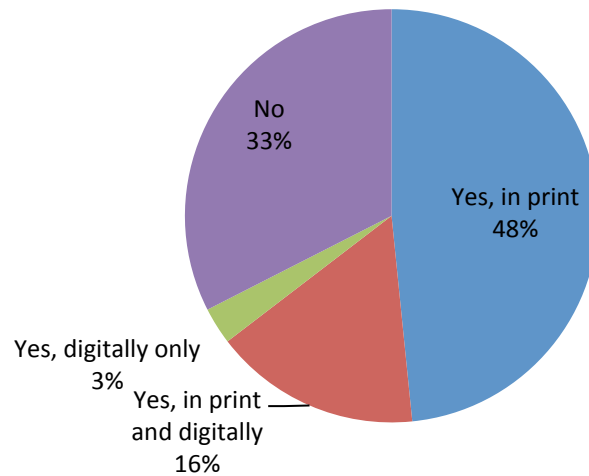
Another core pillar of donor relations is stewardship, a necessity for transparency and trust. Surprisingly, this year still 22% of people said they provided no financial accountability to their donors, and 33% said they write no narrative reports. How can donors know the impact of their giving if we 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 more our donors will trust us.

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. Practice and data show that 25 is the most manageable number of donors to create plans for, reflecting not only staffing constraints but the desire to keep this benefit exclusive for top donors. This is a reflection not only of staffing but the desire to keep this an exclusive benefit for top donors.

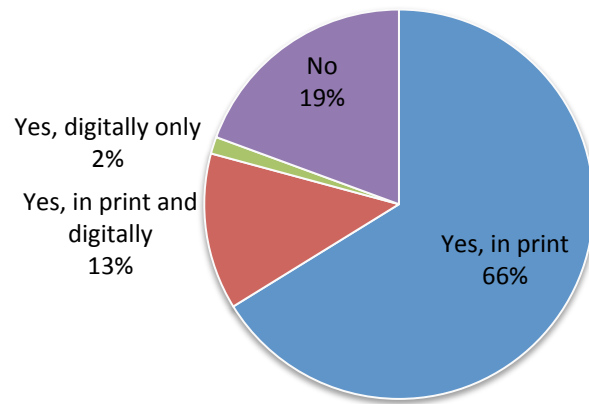
2013 Do your donors receive annual narrative reports on their funds?



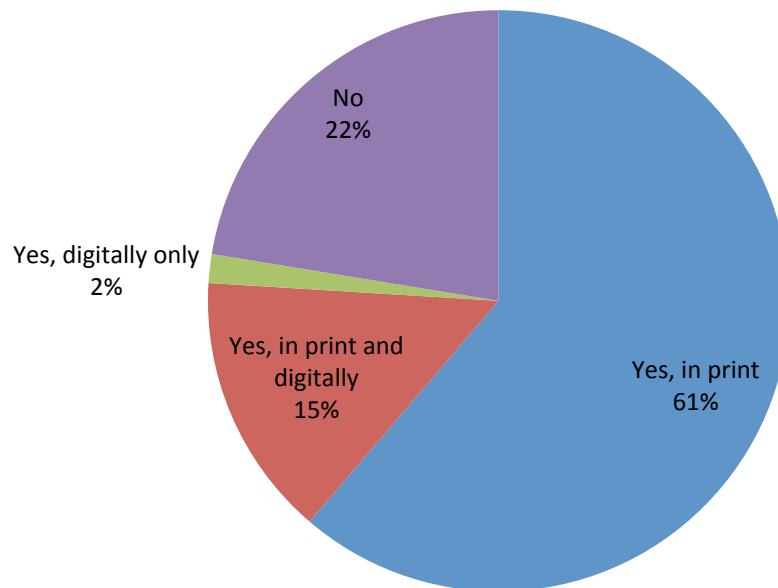
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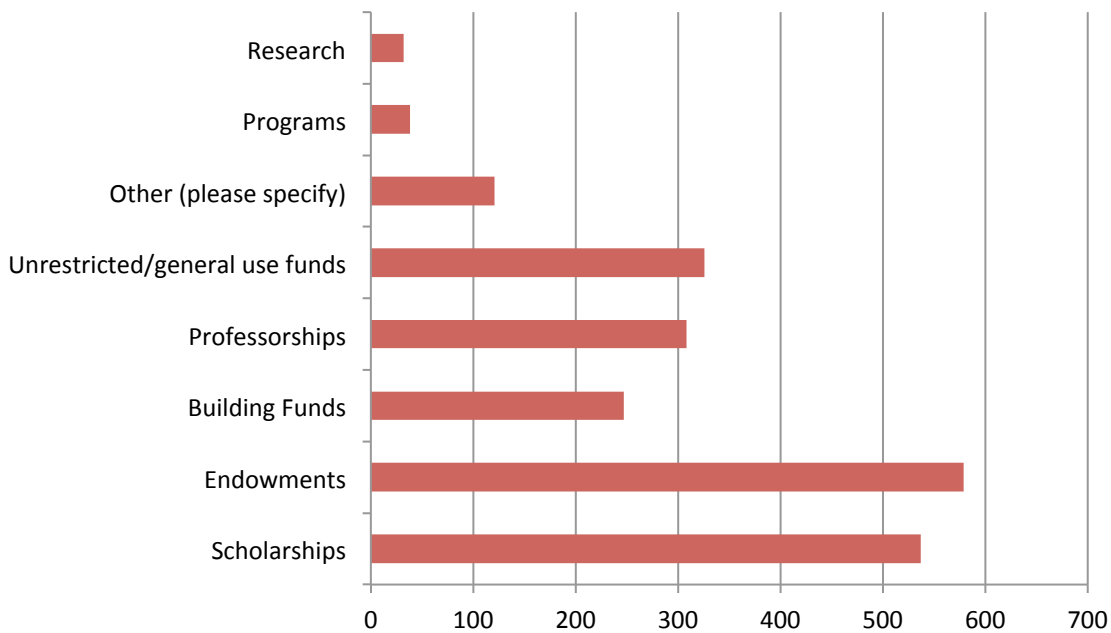
2013 Do your donors receive annual financial reports/stewardship on their funds?



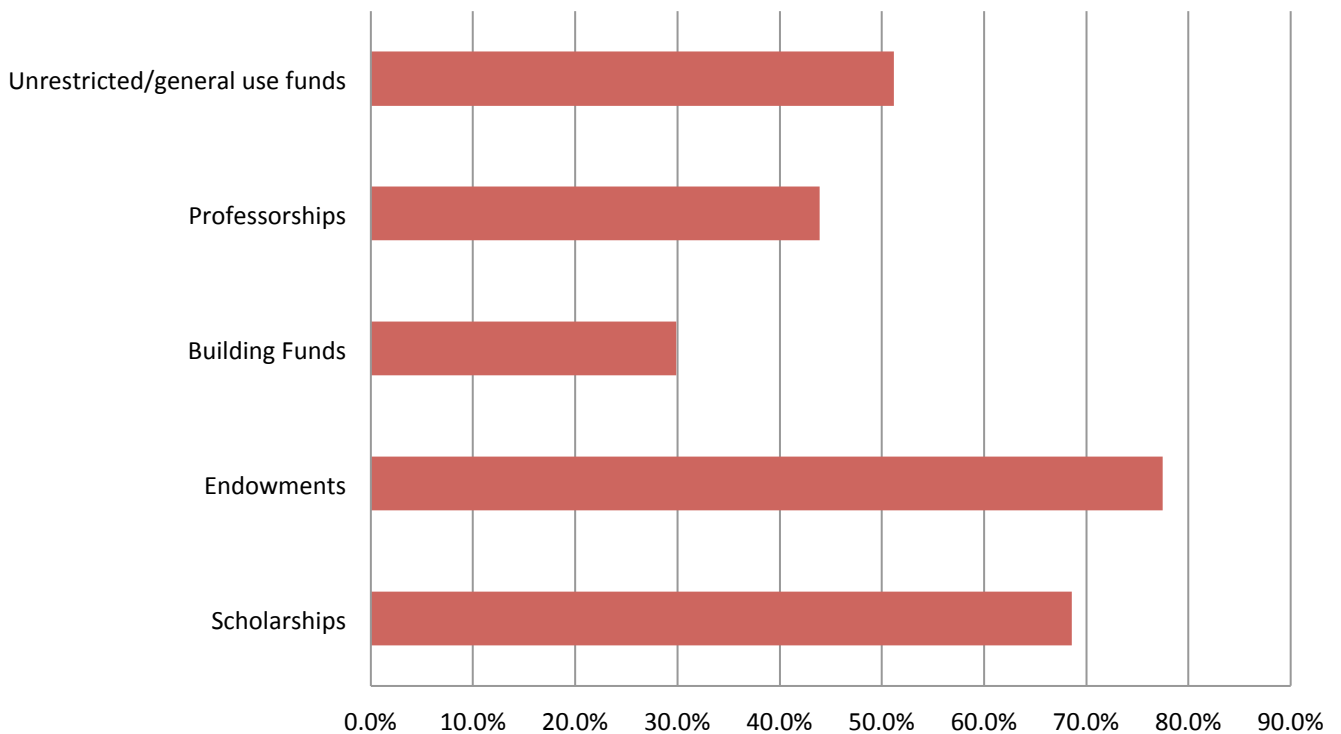
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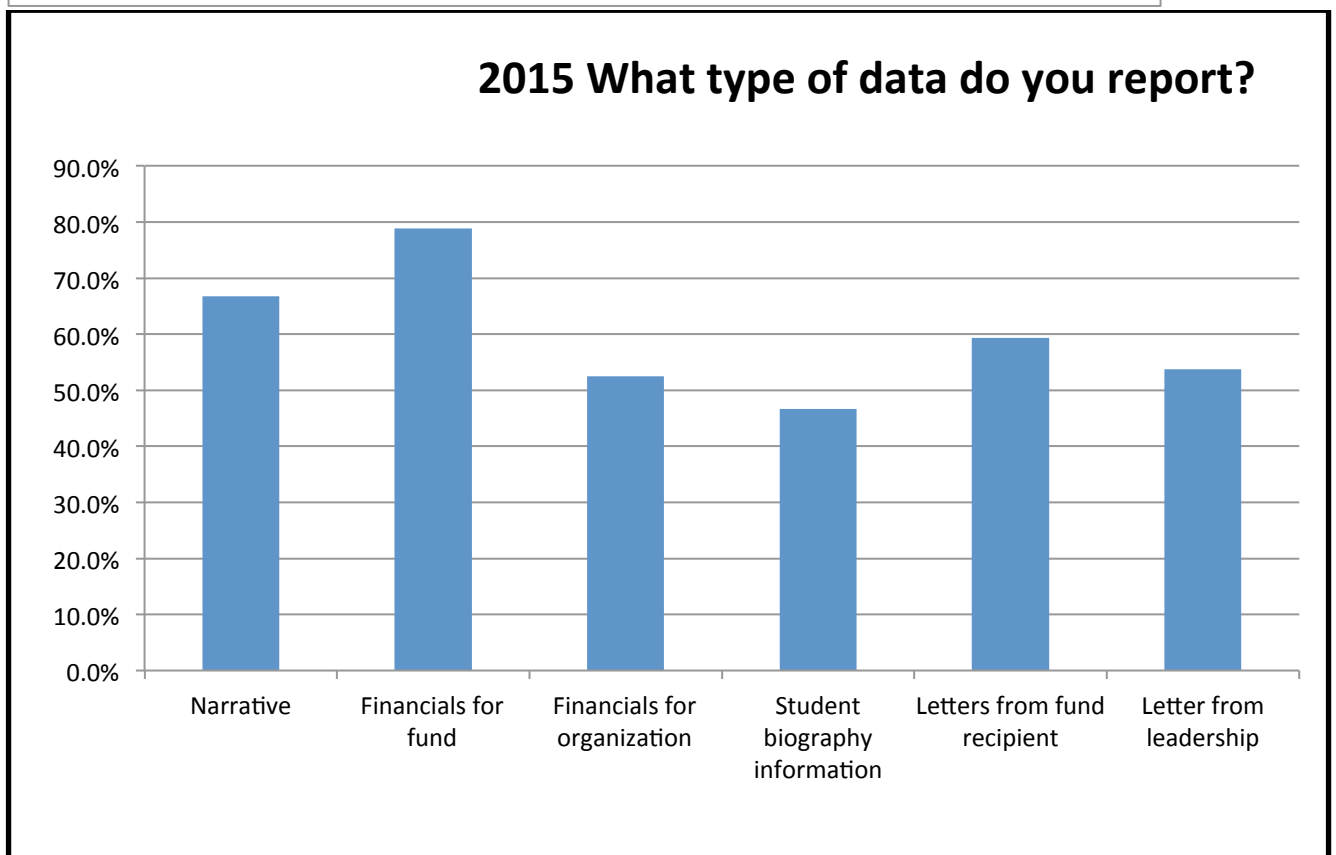
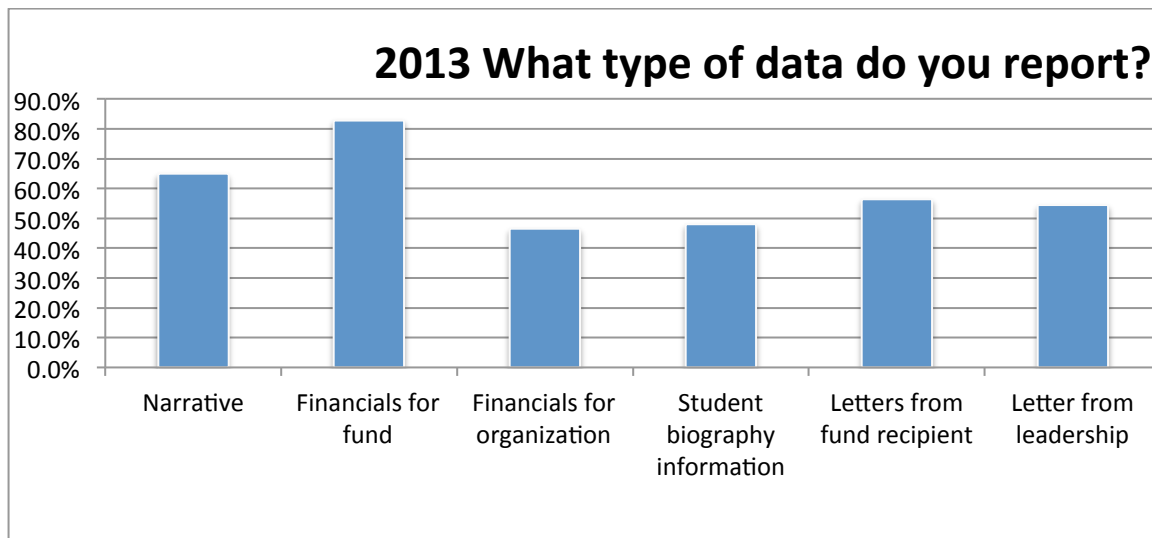


2013 What type of funds do you report on?

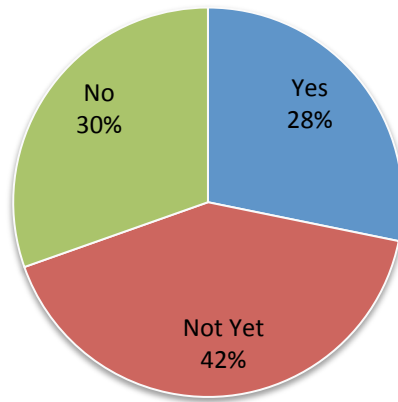


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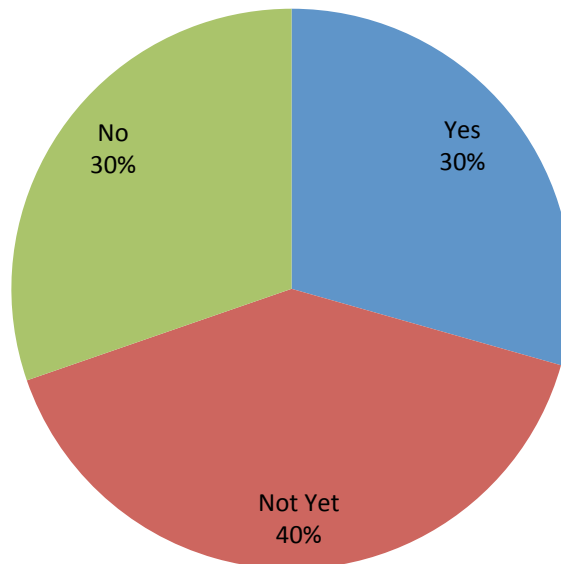




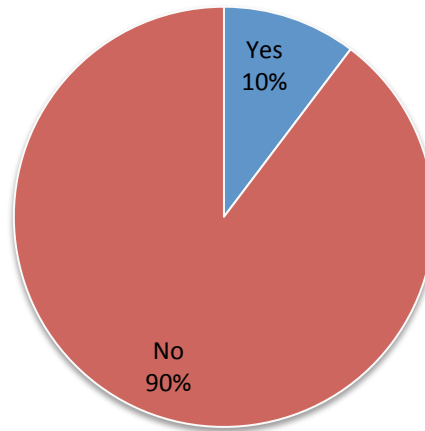
2013 Can your donors receive their fund reports digitally?



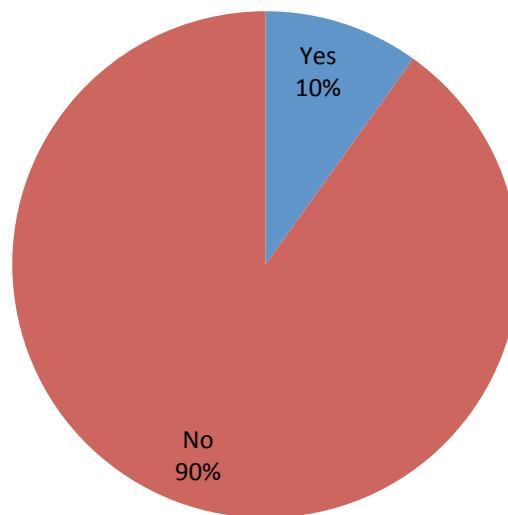
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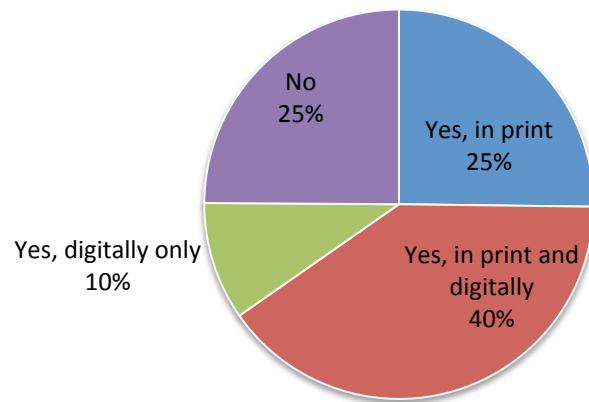
2013 Do donors have an online portal where they can access their data?



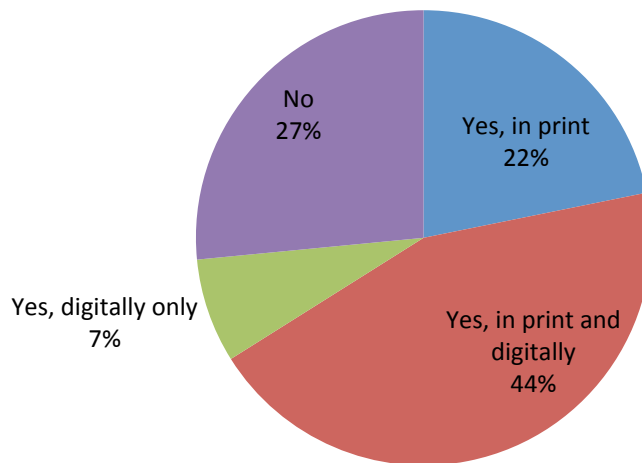
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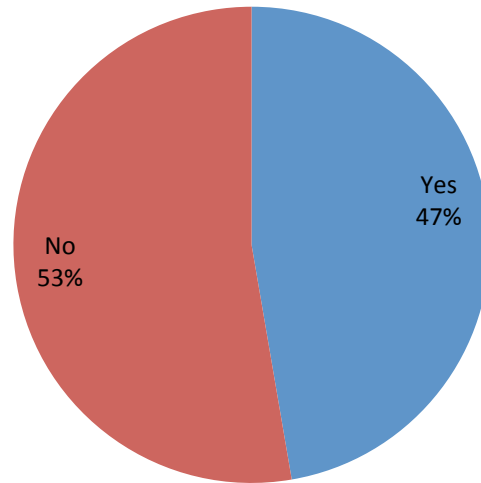
2013 Does your organization produce an annual report?



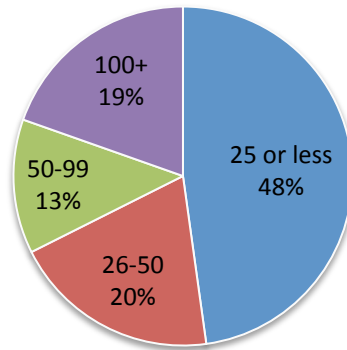
2015 Does your organization produce an annual or impact report?



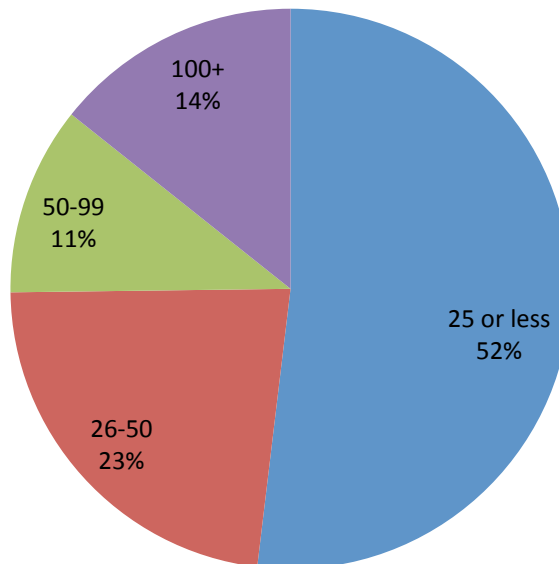
2015 Do you have individual custom stewardship plans for your top donors?



**2013 If your organization has custom/
individual stewardship plans, how many
donors are included?**

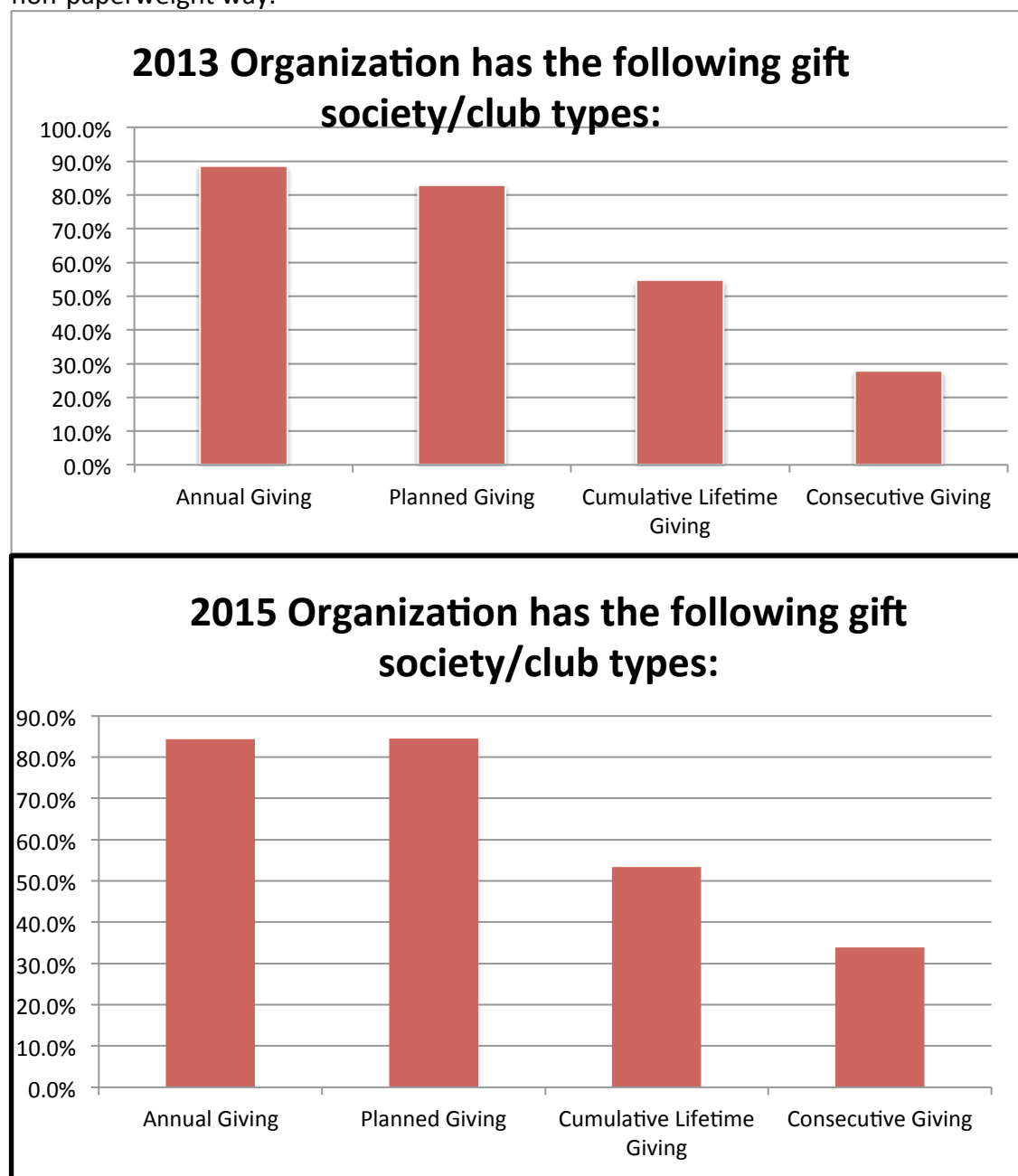


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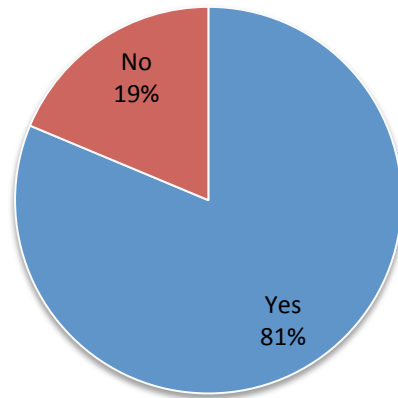


RECOGNITION:

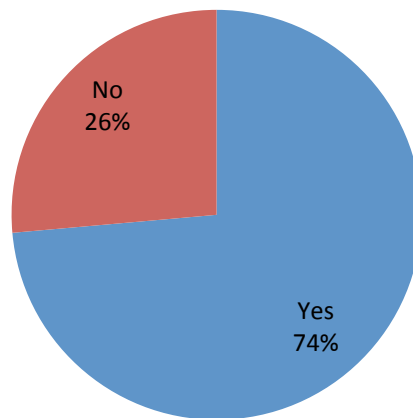
In the grand scheme of the four pillars of donor relations, recognition is a component that almost anything can fall into. What we must do as strategic practitioners is determine the best use of time and resources for recognition, and the ROI of our efforts. It is a fantastic thing to see [donor honor rolls](#) dying off en masse. There is a huge drop off of maintaining gift items in our shops. A new question for 2015 is that of a comprehensive naming and recognition policy, of which we are split equally, I could not recommend something more for your efforts. Continue these efforts and anything else that makes donors feel closer to our organization in a non-paperweight way.



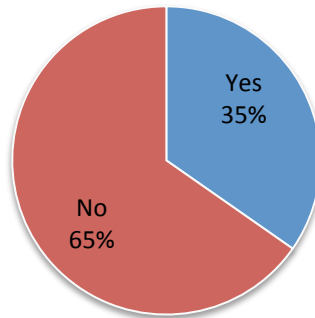
2013 Do your gift societies/clubs have levels?



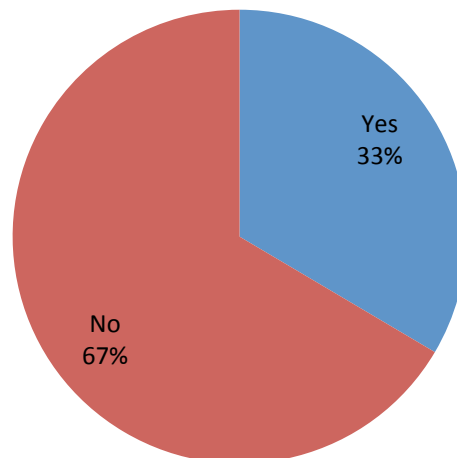
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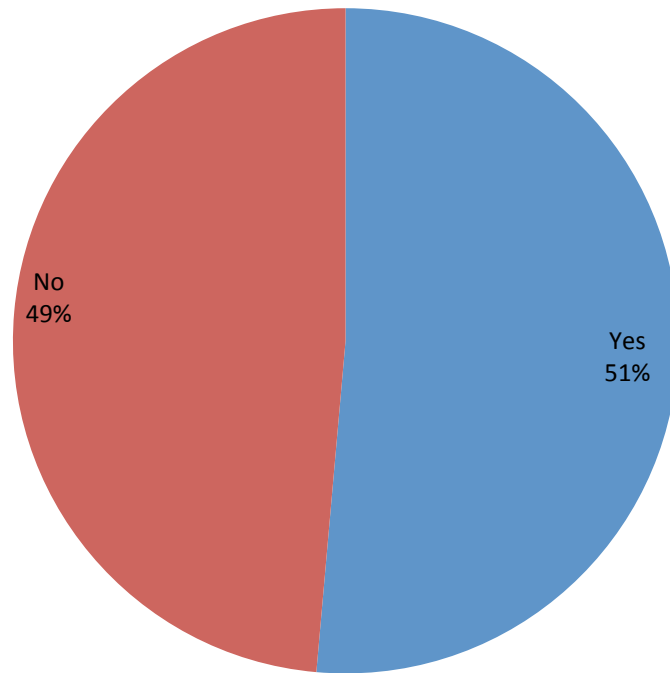
2013 Does your organization have a comprehensive catalogue or listing of all named spaces?



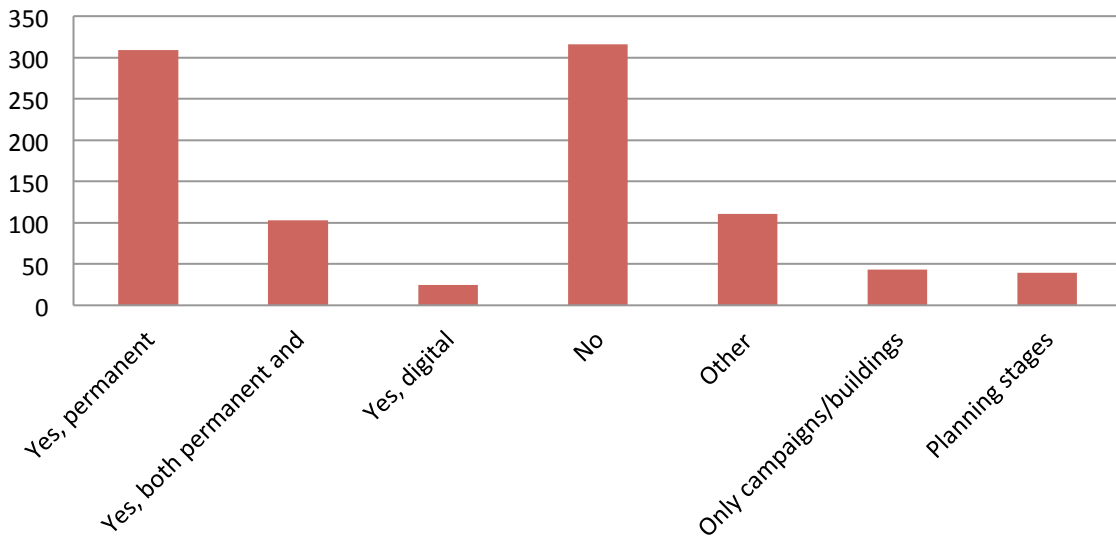
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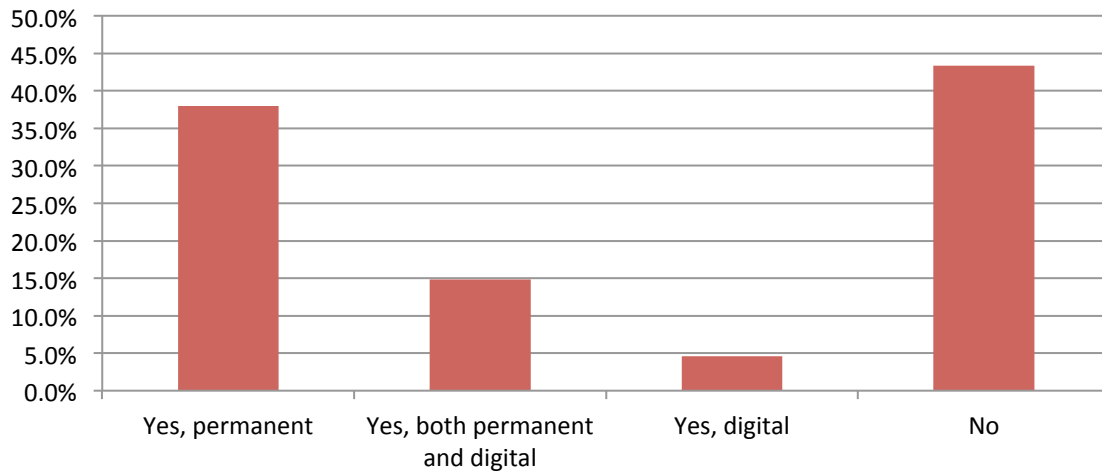
**2015 Does your organization have a
comprehensive naming/recognition policy?**



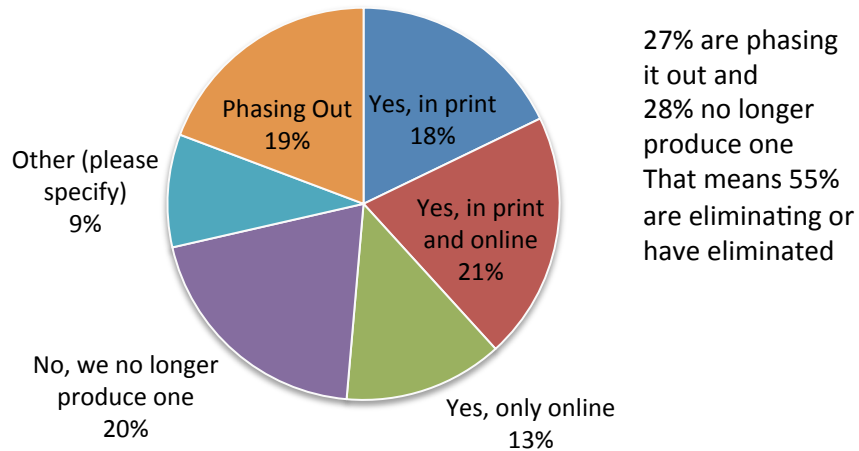
2013 Do You Have a Donor Wall?



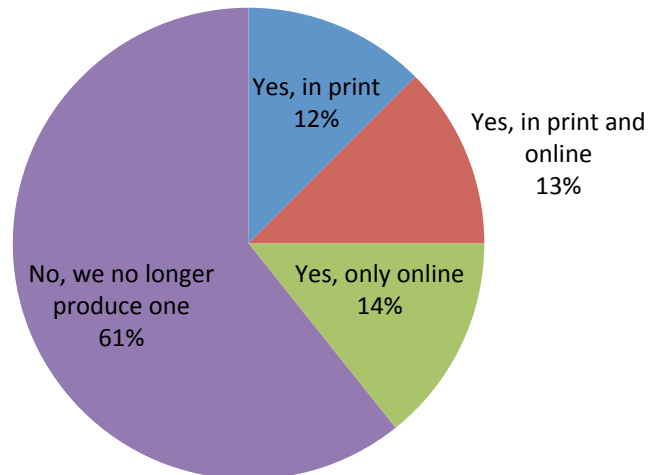
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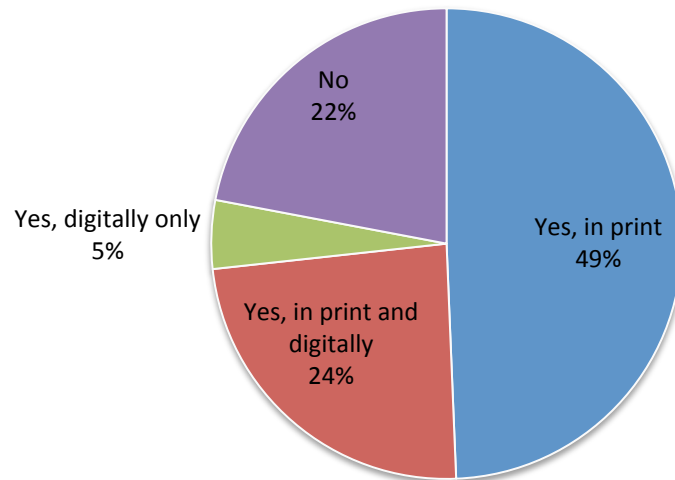
2013 Does Your Organization Produce an Honor Roll?



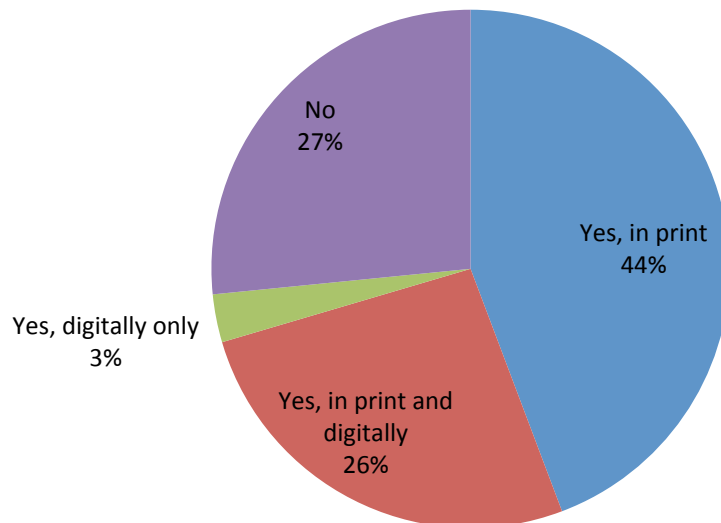
2015 Does your organization produce a donor honor roll?



2013 Do donors receive birthday and/or holiday greetings from your organizations?



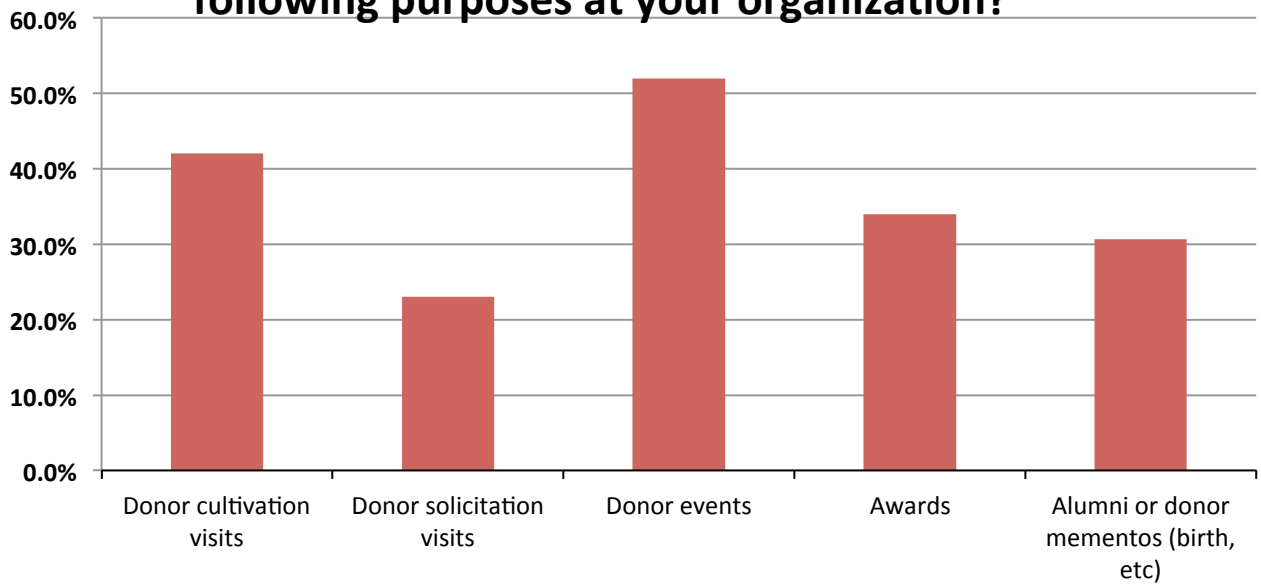
2015 Do donors receive birthday and/or holiday greetings from your organizations?



2013 Do you order and maintain gifts for the following purposes at your organization?



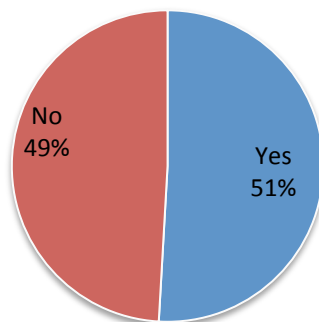
2015 Do you order and maintain gifts for the following purposes at your organization?



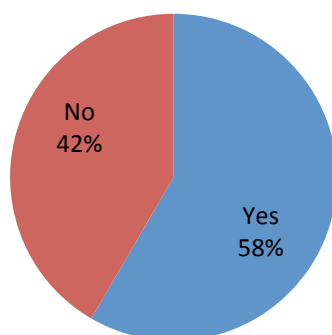
GIFT AGREEMENTS:

Just more than half of us are involved in the gift agreement process at our organizations. The good news is that over 75% 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.

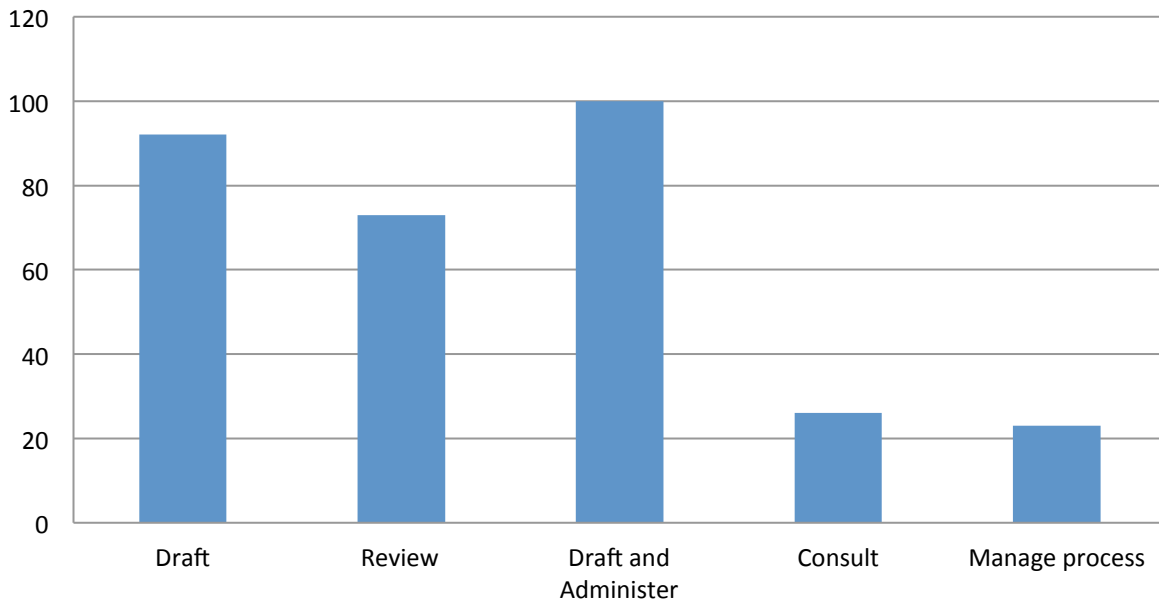
2013 Are you involved in the gift agreement/MOU process at your organization?



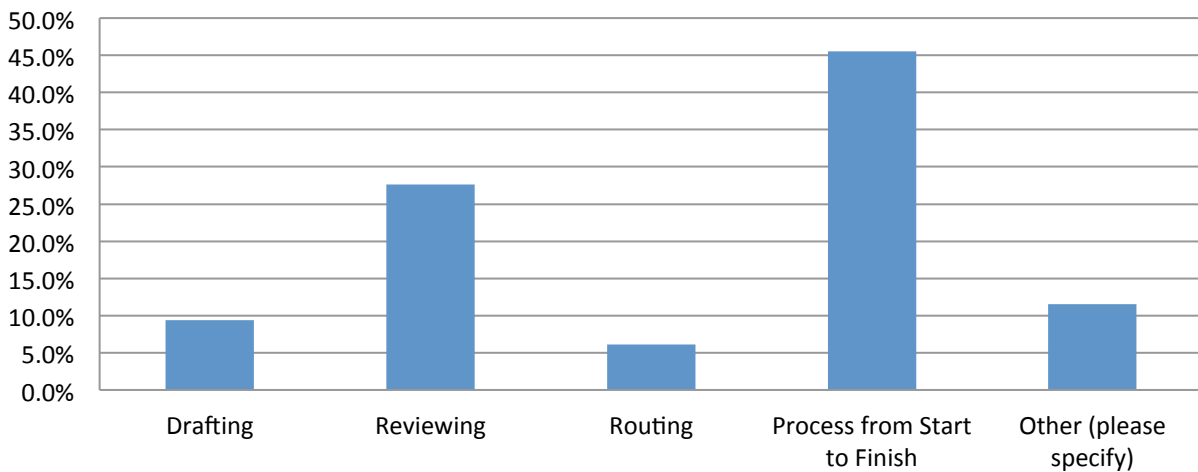
2015 Are you involved in the gift agreement/MOU process at your organization?



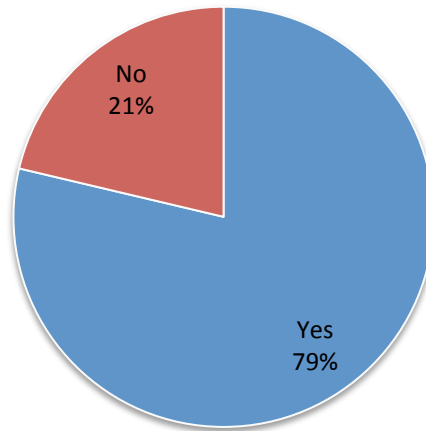
2013 How Are You Involved With Gift Agreements?



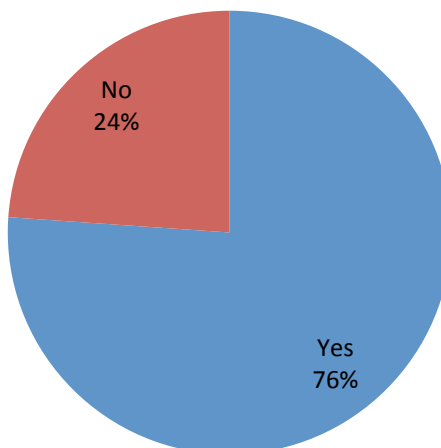
2015 How Are You Involved With Gift Agreements?



2013 Do you have standardized gift agreements/MOUs for donors?



2015 Do you have standardized gift agreements/MOUs for donors?

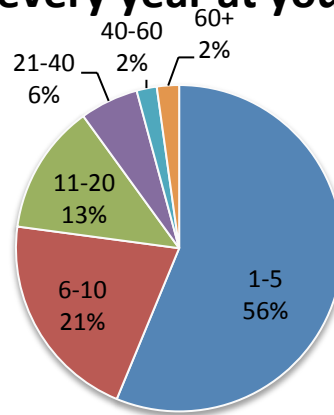


EVENTS:

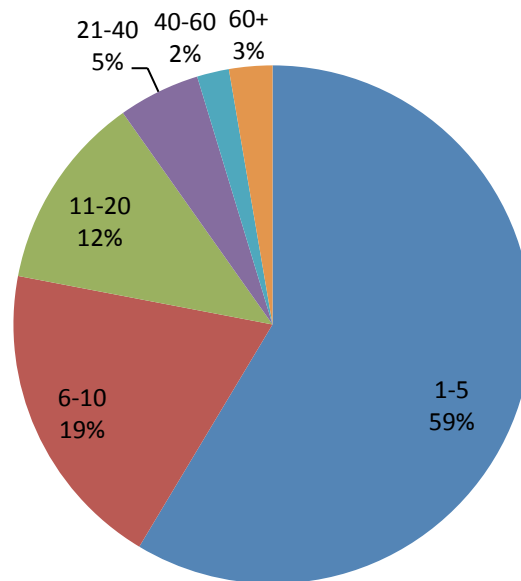
Events can play an important part in the overall fundraising operation and they can take many forms. They are not, however, a magic bullet in solving our problems with donor engagement and recognition; they are a tool in our toolbox. It is important to note that RSVPs have become an issue for many of 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.



2013 How many events do you have under your responsibility every year at your organization?



2015 How many events do you have under your responsibility every year at your organization?



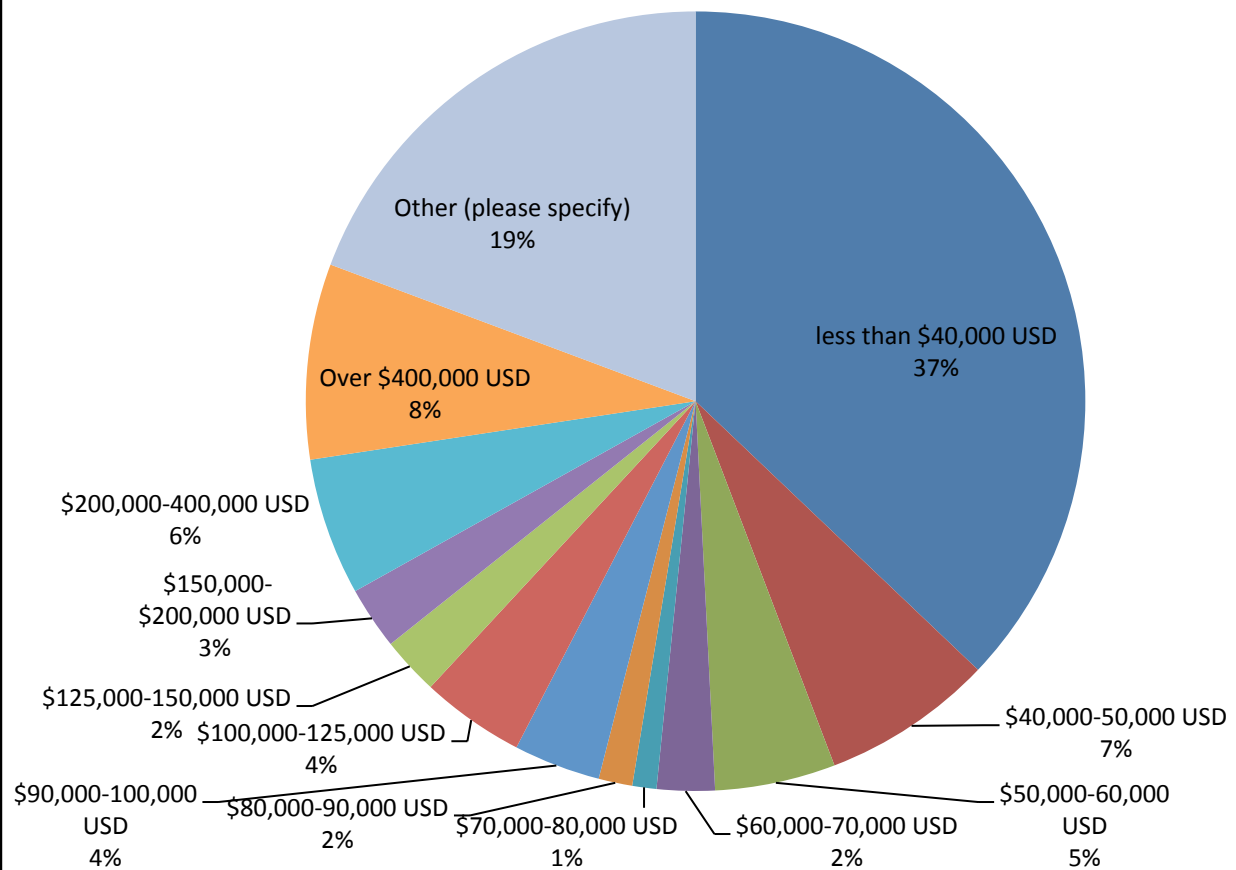
2013 How are RSVPs for events processed at your organization?



2015 How are RSVPs for events processed at your organization?



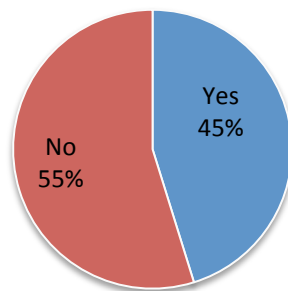
2015 What is the approximate development event budget at your organization?



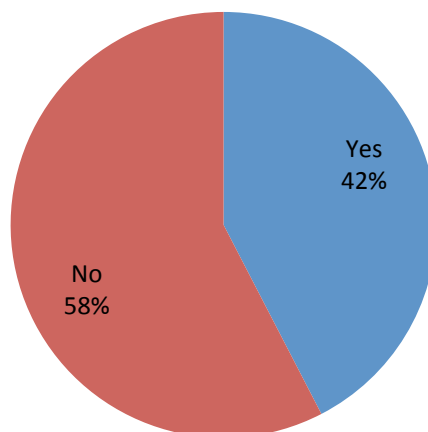
METRICS AND PLANNING:

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 will be?

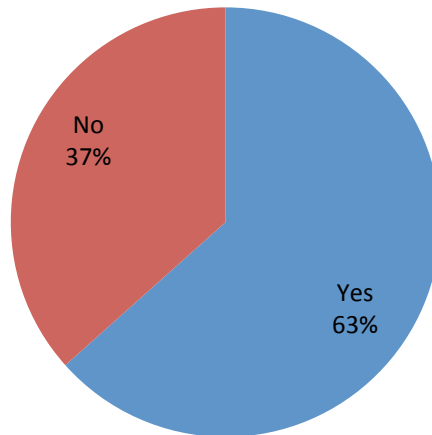
2013 Does your organization have a comprehensive or strategic plan for donor relations?



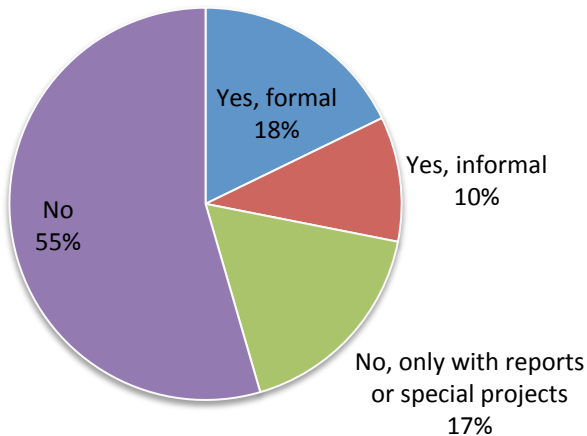
2015 Does your organization have a comprehensive or strategic plan for donor relations?



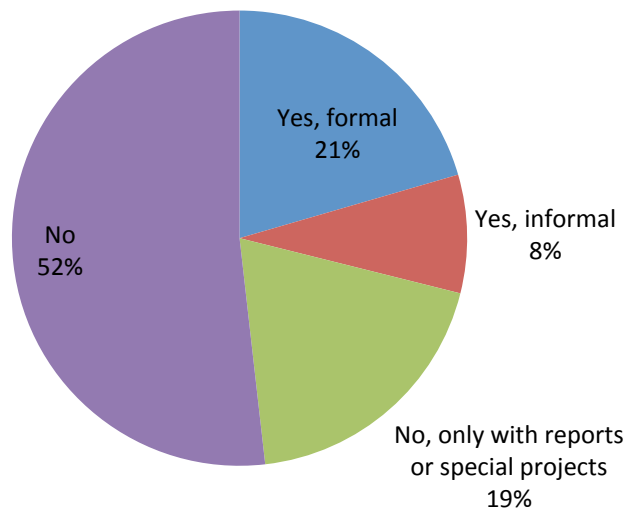
2015 Does your organization have a list of responsibilities and tasks for donor relations?



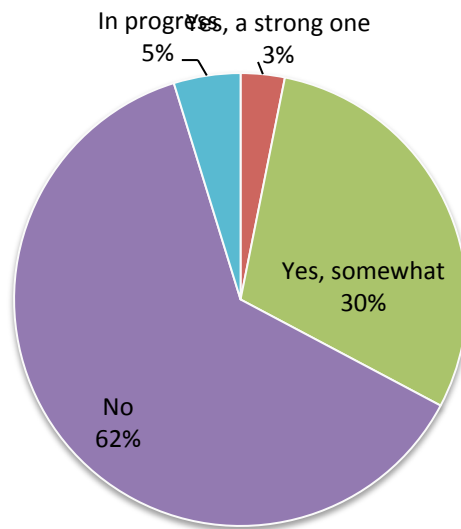
2013 Have you conducted a formal or informal donor survey?



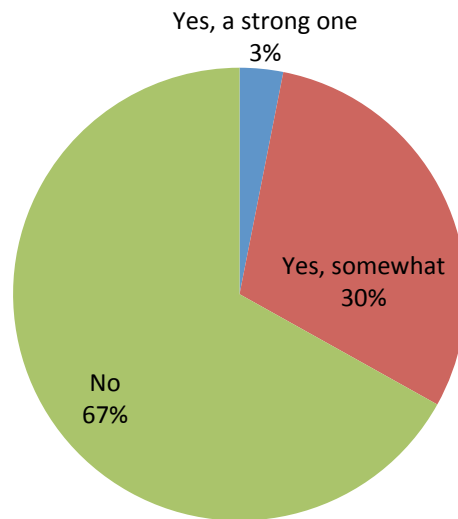
2015 Have you conducted a formal or informal donor survey?



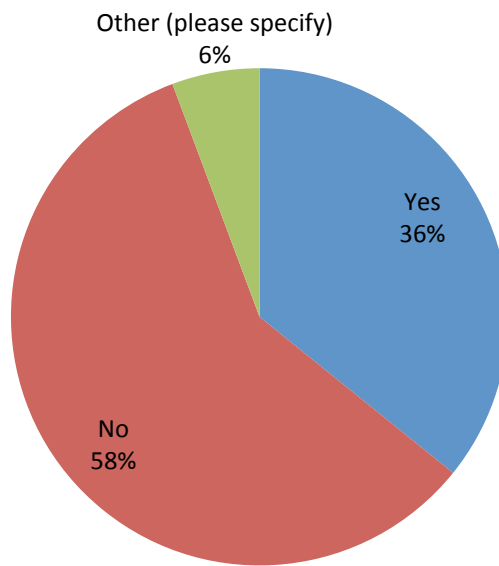
2013 Do you have a metrics program for donor relations?



2015 Do you have a metrics program for donor relations?

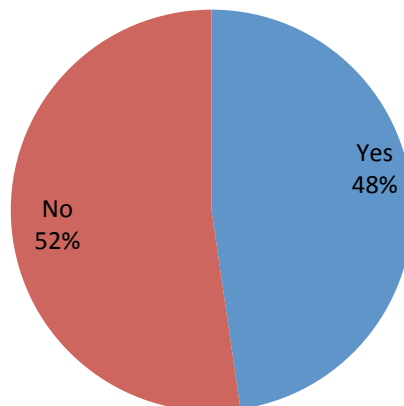


2015 Do you know your first time donor or overall donor retention rate?

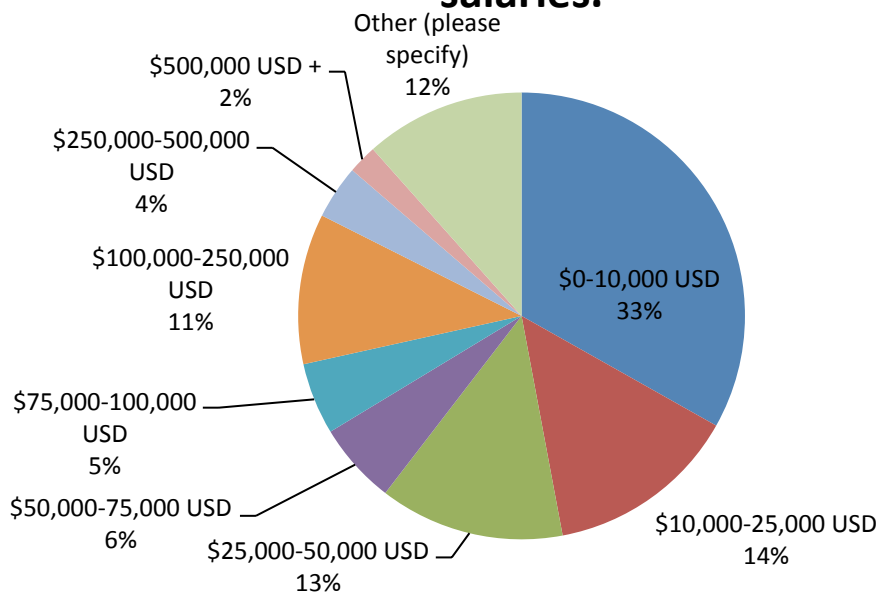


LOOKING AHEAD:

2015 Are you involved in the creation, design or implementation of your online giving site?



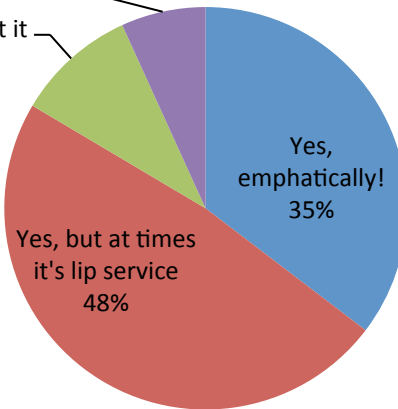
2015 What is the total budget for donor relations at your organization? This does NOT include salaries.



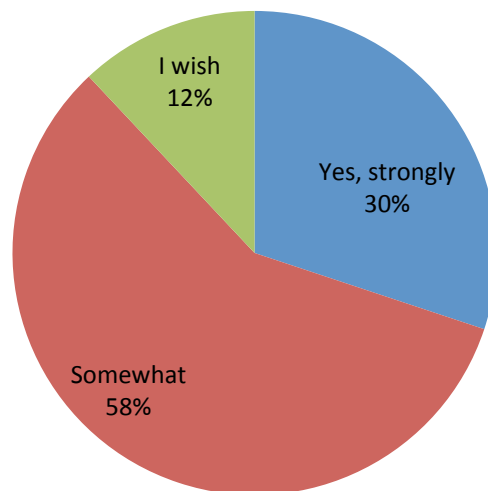
2015 Is your leadership supportive of donor relations and do they advocate for it at your organization?

Other
(please
specify)
7%

No, they don't get it
10%



2015 Does your organization have a culture of gratitude/philanthropy?



What would you like the fundraising world to know about donor relations?

- I would like the fundraising world to learn to look at itself through the eyes of the donor. Again, understanding the motivation of the donor and the psychology of the donor is vital and fundamental to effective communication and relationship building. Most of our strategic conversations in Advancement usually involve me saying at some point, Let's look back at us through the eyes of the donor.
- That good donor relations and effective fundraising are symbiotic
- Together we can enhance a donor's relationship with the organization. In football terms, donor relations is special teams and what we do can give fundraisers better field position when cultivating and soliciting donors.
- Good donor relations and stewardship plans make the MGO's job much easier.
- Donor relations can be more effective if you let us know the donors.
- Donor relations at times feels like trying to put an octopus into a bag, no matter what you do a bit always seems to slip out but we keep trying!
- It is the bridge between the donor and the organization. If done correctly, there will be repeated gifts and happy constituents.
- It is the next most important area in Advancement after front line fundraising
- That it is a vital piece of the fundraising, one that can truly make the difference between a good program and an amazing one.
- We are here to help! We advocate for the donor, but have the same goals as the fundraisers and can help the organization as a whole.
- Donor Relations is an essential part of the fundraising process; we need to be more creative in thanking donors and be open to changing how things are done

What trends do you see in the future of donor relations?

- Personalization; treating donors as individuals; learning how important it is to respect donors' preferences as to what/how often/what medium to use in communications. I would LOVE to see an end to wasteful mailings, tchotchkes and the deluge of unread emails... as a donor, I hate all that stuff. As a donor relations person, I think you do what your donors need you to do, and go the extra mile to listen to them.
- It will be so integrated into fundraising, that we no longer have "development," "advancement", and "donor relations" but "Commitment Officers" :)

- "What is already being done but on steroids. I call it Donor Relations 2.0. We are less of a backoffice/afterthought and becoming more donor facing. We are engaged with our fundraisers earlier in their conversations with donors. We are finding our voice by advocating to have a seat at the table.
- First, I am slowly getting a portfolio of donors. With me on the road visiting our donors and saying thank you, I'm freeing up our fundraisers to do more asking.
- I think more and more organizations are seeing that is more cost effective to retain current donors than it is to gain new ones. I see a lot of organizations revamping or starting donor relations programs, mine is no different. We are formalizing a program to launch this summer.
- I hope donor relations will continue to gain recognition as a worthwhile field and as a valued partner in fundraising.

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