

WHITE PAPER

 **CAMPBELL & COMPANY**

# MAJOR GIVING DURING A CRISIS

A COLLECTION OF ARTICLES TO HELP YOUR MAJOR GIFT TEAM  
NAVIGATE CHALLENGING TIMES

## CAMPBELL & COMPANY | MAJOR GIVING DURING A CRISIS

The following articles explore how to make the most of the four pillars of major gift fundraising—Leadership, Staff & Systems, Case for Support, and Donor Engagement—in times of crisis. If your organization is navigating a challenging situation, it is important to stick to your mission and implement best practices. In this collection, we've provided strategies to help build relationships, leverage donor data, tweak donor communications, and retain high-performing fundraisers.



CAMPBELL  
& COMPANY



# TABLE OF CONTENTS

How Nonprofit Leaders Can Build Relationships During Times Of Crisis	3
How To Use Donor Data To Develop A Crisis Fundraising Strategy	6
So You Did Your Crisis Communications. Now What?	12
Six Messages Or Less: Why The Best Fundraising Cases Fit On A Notecard	14
Hiring And Keeping High-Performing Fundraisers	17



## HOW NONPROFIT LEADERS CAN BUILD RELATIONSHIPS DURING TIMES OF CRISIS

Nonprofit leadership is not an easy role. Most of us become involved in nonprofits because we have a passion for the mission. As a staff member, you probably joined your organization because you love the programs, and now, as a leader, you have to become an expert in all areas of organizational management.

You know that your mission and programs are only successful if governance and development are carried out effectively. During this uncertain time, we are finding that resilient organizations have collaborative, deliberate leaders who are focused on relationship-driven fundraising.

Effective nonprofit leaders implement ethical, consistent systems at their organization. This includes financial management, hiring, data management, and program implementation. The best leaders also build strong, authentic relationships to support and grow their organizations. These relationships are also at the center of major gift fundraising—and it's the most challenging aspect of nonprofit leadership. How do you build and grow strong relationships, especially in times of crisis?

Below are two best practices that will help you maintain current relationships and build your major donor pipeline.

### Leverage your board to maintain your major donor relationships.

Yes, there is a lot of “noise” out there right now. But donors are listening to the organizations and causes that are important to them, and they are stepping up with support. You have a unique opportunity to articulate your relevance and ask for support in basic areas, such as core operations. Start with all of your current donors. Don't be shy. Share organizational updates and ask them to support your essential work.

To reach your major donors, ask your board for help. Your board members may be more responsive right now. They are likely worried about your organization and want to contribute. Asking them to participate in major donor stewardship is an ideal way to involve them. You should:

- Choose two to four donors for each board member to call or email. While they don't need to have an existing relationship with the donor, be sure to share an overview of the donor's giving history.
- Guide them with a simple script. For example, “I'm calling to thank you for your support, check in to see how you are doing, and share where we are today.”
- This activity will strengthen the bond you have with your donors, and it will give your board members an opportunity to practice their outreach while serving an important function. And it will likely result in securing major gifts now and in the future.

### Build your major donor pipeline with relationship maps.

Relationship maps are a simple visual tool to help uncover connections between potential donors to an organization. They can also provide insight for donor engagement strategies. Maps can be built from two perspectives: volunteer leadership connections and potential donor connections.

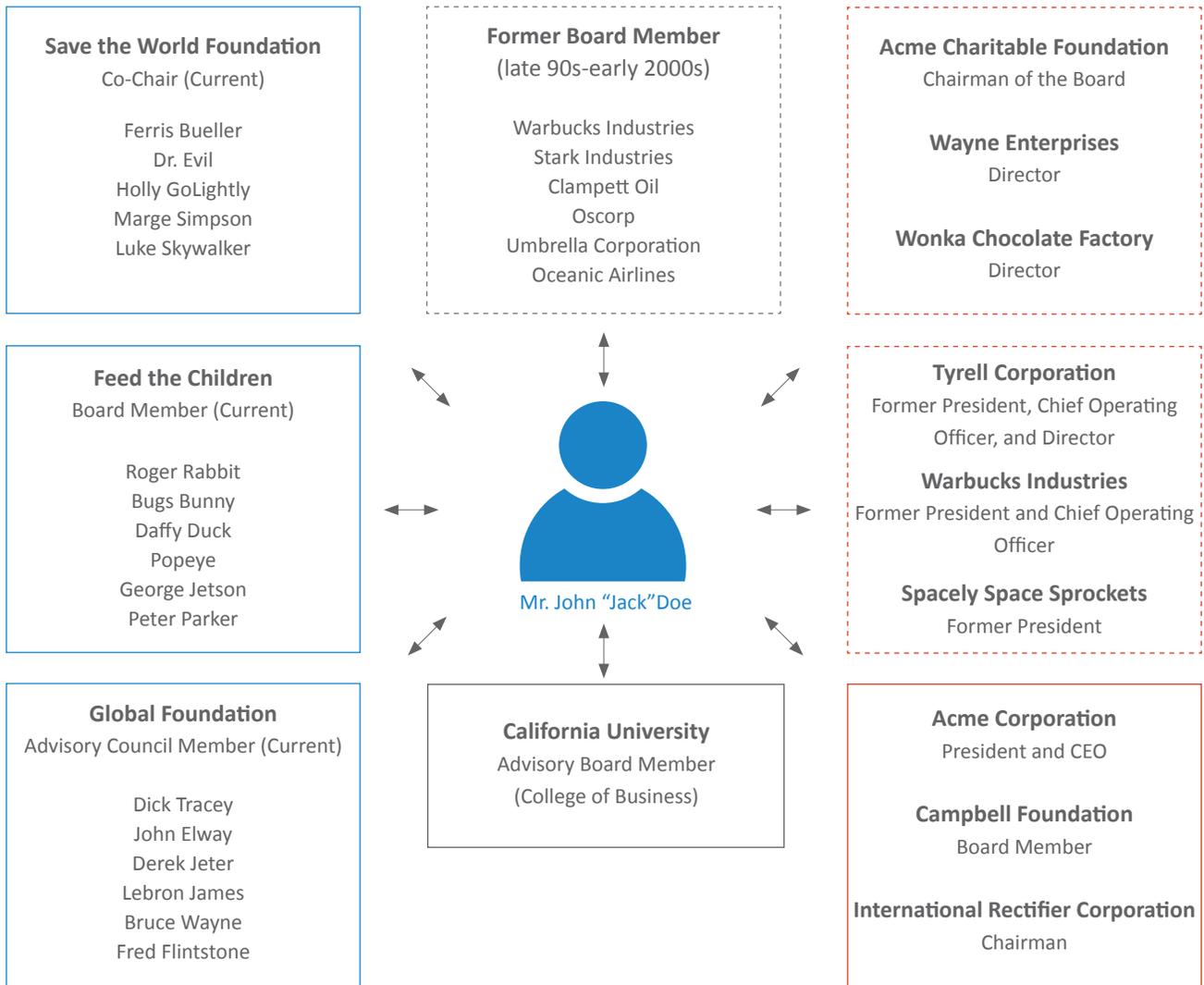


## VOLUNTEER LEADERSHIP PERSPECTIVE

Volunteer Leadership Perspective maps help a key board member create a relationship map from their own perspective. The board member puts their name in the middle and begins listing who they know in their social and professional circles: coworkers, neighbors, church members, fellow alumni, and fellow parents. The people they list do not have to be currently connected to your organization, nor do they have to be a major gift prospect. The goal is to find connections, networks, and door openers, not to build a list of people that a board member is responsible for cultivating.

At a board meeting, ask your board member to share their relationship map. This will help others understand who in their network may be a helpful connection. You have probably heard your board tell you that they don't know anyone—reviewing a peer's relationship map will help to debunk this assumption.

This activity will also stimulate conversation around shared connections that board members have in common, leading to a strategy for outreach. Emphasize that the people on the relationship map may not all be potential donors, but they could be a key part of a strategy to engage those who could be.





## POTENTIAL MAJOR DONOR PERSPECTIVE

The goal here is to collectively uncover what you may already know about a potential donor and in order to create a strategic engagement plan. Begin with the same relationship map outlined above, placing that person's name (or picture) in the middle of the map, and as a group, draw out what you know about that person. What organizations are they involved with? Where did they go to school? Where do their kids go? Where do they work? Who do you know involved with any of these connections? At each board meeting, designate 10 to 15 minutes to discuss one major donor prospect.

The purpose of this relationship map is to find the best person (or people) to engage a potential donor. Write out each next step and the person who is going to carry it out. Make it simple and be prepared to pivot. You may have to walk down a couple of paths before you can qualify or disqualify that potential donor.

Relationship maps may not produce results immediately but stick with them. Return to them with your board on a regular basis. Remind your board that the purpose of this activity isn't to create a prospect list they are responsible for, nor is it to "force" them to ask their friends for money. The purpose is to identify and understand connections to people who may have passion for your mission.

During times of crisis, it's important to remember that relationships are at the heart of successful and sustainable fundraising. Though it can be challenging, nonprofit leaders who focus their efforts on building strong, authentic relationships will be most prepared to lead their organization out of uncertainty.



## HOW TO USE DONOR DATA TO DEVELOP A CRISIS FUNDRAISING STRATEGY

When confronting a crisis, your fundraising strategies don't need to be put on pause, but they do need to shift. Outreach to your top supporters should keep happening, with strategies that reflect the current moment. Simultaneously, organizations that have the bandwidth should plan for next steps, identifying prospects to cultivate now for asks later.

With that said, for most organizations, using limited resources effectively is a challenge in itself. To rise to the moment, we recommend a three-stage process—get ready, get set, go!—which any organization can execute in as little as three weeks. No matter the crisis, following this process can set you up to secure gifts now and build capacity for the long term.

### STAGE 1: GET READY

Getting ready is the first step. By taking stock of what data you have and what data you need, you'll be in a better position to plan your initial outreach and adjust your strategies as you move forward. This first step includes many moving parts (including data integrity, reports, segmenting, and a survey), but an investment of time now will save you more time later.

Not all organizations will be able to quickly collect all this information. If you're limited by time or resources, focus your efforts on segmenting prospective donors with the data you have. Preparing these segments will be critical for what comes next.





## DATA INTEGRITY

Start this process by looking at your database. Maintaining clean, accurate data will take a small investment of time but will pay dividends down the road. Focus on these five questions:

### Have you been updating emails and addresses?

Having the right addresses and properly categorizing them (e.g. home vs. business) has several benefits. Home address data is useful for sending direct mail and conducting additional research like wealth screenings.

If you haven't done so in the past year, consider conducting a National Change of Address data append. An email append can also be a useful step if you haven't conducted one recently.

### Have you been checking for duplicate records?

There are always more duplicate records in your database than you expect, and these can interfere with consistent tracking. There can either be more than one record for the same constituent or more than one record from different constituents in the same household who aren't linked.

Your database system might do some of this for you, but if not, it's a quick process:

- Export your constituent base's IDs, names, and home addresses.
- Create a household key by pulling the beginning of the address field (e.g. first 13 characters), city, state, and last name.
- Compare those household keys to find people who live at the same house with the same last name but with different IDs.
- Once you look through the list to verify that duplicates caught should either be merged into one record or householded together, merge the records in your database using its unique merge constituents feature or add relationships to link related household members.

### Are you tracking your appeals?

At this moment, what kind of appeals work best might be an open question—and the answer most likely varies by constituency and timing. Tracking appeals, on the front end as they are sent out and the backend as donors respond to them, will help you answer that question and redirect limited resources to the most effective fundraising strategies.

### Are your relationship management tracking processes up to date?

It's important to know who your top donors and prospective donors are and ensure they are individually managed. Too often, we find portfolios are populated with longtime institutional friends or annual fund donors who do not intend to increase their giving significantly.

Your best donors and prospective donors should be assigned to fundraisers' portfolios with stages and proposals tracked in your database. You may need to change proposal amounts and dates as you learn more about their willingness to give, but having this data filled in will help you evaluate your pipeline. If you haven't been tracking this data, now is the time to start!



## Are you tracking actions?

In a crisis moment, it's especially critical to share information about fundraising activity systematically. Do you have a way to track virtual meetings vs. in-person meetings? This may be important to know later in the relationship. If needed, consider holding a quick refresher session on how to track fundraising data for everyone who will be using the system.

## REPORTS

While you're focusing on data hygiene, you should also make sure you have the database reports you need. With the right reports, you can track and share progress, making sure your fundraising is coordinated effectively.

If you have time, you might consider building new reports for things that are pressing now. For example, do you have reports on fundraiser activity, response to specific appeals, or gifts to a crisis fund?

You can also check which reports are being run regularly and automate them. Not only does automation save time, it also removes the possibility for human error. If your database can't do this, there are new inexpensive tools you can use. You can either check with your database provider, or ask us if you need more information.

## SEGMENTING

As you move forward, you'll likely have limited time for strategy development. To make sure you're matching the right approach to the right donor, take some time to quickly segment your donor pool. You can do this by looking at three factors:

**Capacity.** This is how much potential the donor has to give. Capacity can be based on several factors, including:

- Frontline or internal research assessments
- Vendor wealth screening
- Modeling projects
- Peer screening activities with board or committee members
- Past giving

**Engagement.** How close is a constituent to your organization? Engagement measures this affinity, and there are a variety of ways to calculate it: a simple recency, frequency, monetary value (RFM) score, a more sophisticated engagement score based on a point scale, or predictive models. Pick the one that best fits your internal expertise and time available.

**Risk.** Do you know who your most at-risk donors are? And do you have a plan for them? Risk represents the urgency of reaching out to a constituent to keep them as a donor. Prospects with a high risk factor include:

- Donors whose annual gifts are decreasing in value
- Donors who typically give during events that are cancelled this year
- Lapsed and first-time donors who gave last year but who have not yet renewed
- Organizations that make gifts on a spring or summer cycle



Based on these three factors, you can assign prospects to segments, allowing you to develop a short-term action plan for each

	Capacity	Engagement	Risk
<b>Actively Managed</b> (in portfolios)	High	High	Low
<b>To Be Qualified</b> (in portfolios)	High	Medium	Low-Medium
<b>High-Risk Annual Supporters</b>	Medium	Low-Medium	High
<b>Low-Risk Annual Supporters</b>	Low-Medium	High	Low

**Actively Managed.** These are your closest supporters, requiring tailored engagement strategies. Everyone in this segment should be assigned to a portfolio in the cultivation, solicitation, or stewardship stages. The next section explains how to make an individualized contact plan for check-in calls and use your CRM to keep you on track. Set aggressive, but achievable, goals for how many of these contacts each officer should strive for on a monthly basis.

**To Be Qualified.** Prospects in this category have demonstrated capacity and may be interested in deeper engagement based on their engagement score or giving history. You should continue to reach out to these folks for one-on-one interactions and check-in calls. Contact them individually with the goal of determining who may be interested in making a more significant philanthropic impact. Again, set aggressive, but achievable, goals for how many of these contacts officers should aim to make each month. Download our Qualifying Donors study to learn more.

**High-Risk Annual Supporters.** These annual supporters might decrease or cease their giving if they don't get sufficient outreach. And remember, your annual fund is the pipeline to major gifts. This group will need more creative—but still reasonable—outreach strategies, especially with the increased competition for philanthropic dollars.

**Low-Risk Annual Supporters.** These are annual supporters with low risk scores who will continue giving on an annual basis more or less consistently. Keep this group engaged with relevant and timely communication, but don't put too much of your effort here. These people believe in your mission so leverage materials and events being developed across your organization to keep people informed and connected.



Keep in mind that not everyone in your database needs to be added to a segment! Starting with this list should help prioritize your prospect pool for key staff functions and ensure you are continuing to engage prospects and steward relationships, whether individually or as part of a group.

## SURVEY

Finally, we recommend launching a short survey to all prospective donors who are not currently under management. (As discussed above, those under management can instead receive a check-in call from their relationship manager that hits the same points as the survey.)

You shouldn't expect to hear from everyone. The point is to gather as many responses as quickly as possible, so you can get a sense of how your community is feeling. You want to find out:

- How people are feeling in general
- How they are feeling about your organization right now
- How they want to communicate with you
- Whether philanthropic giving is still on their radar right now

Keep the survey open for one week.

## STAGE 2: GET SET

In the second stage of this process, it's time to use the segments you created and the survey data you received.

### CROSS TABULATE THE SURVEY RESPONSES BY KEY SEGMENT

Begin by breaking up the survey responses by the segments noted above and looking for trends. How are people feeling group by group? Has interest in giving increased or decreased in specific segments? Are there specific leaders or staff that people want to hear from more?

Based on your findings, try to draw broad conclusions about your donor segments. Put these conclusions in writing and run them by frontline fundraisers, leadership, and/or communications staff to confirm that they feel right.

It's okay if these conclusions aren't 100% applicable to every supporter—the important thing is you have a starting place for quickly developing strategies.



## DEVELOP A COMMUNICATIONS PLAN FOR EACH GROUP

Use your findings to develop a communications plan specific to each group. These plans should cover the next three to four months with the expectation that solicitations will still be conducted during the crisis, as appropriate. Engage the right team members for each segment, and think about the following:

- **How often will you communicate?** Use preferences you gathered from the survey to plan how often each segment will receive outreach.
- **How will you communicate?** Make sure you're connecting with them through their preferred method of communication, whether it's meetings, phone calls, emails, direct mail, or other channels.
- **What messages will you focus on?** Segments will likely have different interests and respond to different type of appeals. Think about the standard messaging approach for each segment.
- **Who needs to be involved?** Carrying out these strategies could be an all-hands-on-deck proposition. Identify the staff and volunteer support you'll need.

Once you've completed these plans, check your database again. If there are any new reports you need to track success start building them now.

## STAGE 3: GO!

Start executing your strategies for each segment as soon as they're completed.

- **Actively Managed and To Be Qualified:** For segments that require one-on-one communications, prioritize your donor lists by putting prospects ready for solicitation first. Remember to track outreach efforts in the system, review progress regularly, and discuss successes and challenges as a team.
- **High- and Low-Risk Annual Supporters:** For segments that receive group communications, focus your efforts on getting the next big communications push out as soon as possible. Whether through a mass email, a mass mailing, a social media campaign, or a combination, your community needs to continue to hear from you. Once you make that push, stick to your plan to schedule subsequent communications. As with other segments, track actions and appeals in the database.

Throughout this process, keep an eye on your reports to track progress overall and by segment. These reports will be critical to continuing the path forward: while you can't predict shifts in the overall philanthropic environment, the performance of different segments may offer some actionable lessons. If you're able to do some A/B testing with specific messages or strategies, this can provide even more useful information.

## GOING FORWARD

This approach should be a helpful addition to your crisis management strategy. In times of uncertainty, we're hopeful that these tips will help your organization along the way.



## SO YOU DID YOUR CRISIS COMMUNICATIONS. NOW WHAT?

Should you need to venture into the wilderness of donor communications in a crisis—like a pandemic—we put together a few tips for how to take the long view while continuing to be mindful of the current context.

### ASSESS THE IMPACT ON YOUR CASE AND VISION.

Crisis fundraising is often necessary in the moment, but the long-term vision you share is what cultivates meaningful relationships, inspires giving, and makes a long-term impact. It can be difficult to look forward when the future seems so unknowable, and you won't have all the answers. That's okay. But you can ask a few important questions to begin making a broader case:

**Has the crisis fundamentally changed our organizational/campaign vision?** Do you need to make a different change in the community? If yes, it may be a good time to step back and do some visioning or planning around these changes. If not, stay the course.

### **What does the community especially need in the coming year(s), and why are we best positioned to offer it?**

What systemic issues have been brought to light that you can address? Think beyond the next month or two.

**What does your response to the crisis say about your organization?** Are you a human services organization that's built to help families through this moment? Are you an arts organization that has always inspired people to make meaning from challenging times? Use your current activity to highlight a bigger value proposition at the heart of your case.

### UPDATE YOUR CASE, BUT DON'T GO BACK TO THE DRAWING BOARD.

Perhaps the fundraising landscape has changed, but the inherent value of your fundraising effort probably hasn't. A pandemic or volatile economy doesn't mean your case needs a rewrite or it's not okay to ask for money for something other than emergency response.

If you do make updates, focus them on:

- A changing context and environment for your work
- A stronger call to action around increased need
- An invitation for donors less affected by the crisis to give
- Specific projects or programs that feel especially relevant over the next few years
- A longer timeline for your work (several years)



### BRING THE FOCUS BACK TO YOUR MISSION—AND BEYOND THE CURRENT MOMENT.

Once the initial crisis has passed, it's okay to start talking about whatever specific projects, programs, or vision you are focusing on. Use the aftermath as a bridge to talk about your mission. As you move out of the immediate impacts of the moment, focus on how your mission will offer real solutions for longer-term issues.

### LEAN ON FLEXIBLE MATERIALS AND TOOLS.

In times of crisis, focus on creating communications tools that are built for flexibility and mindful of your post-crisis budget. Some ideas include:

- **Internal talking points, FAQs, and cheat sheets** that support one-on-one conversations so you can keep deepening relationships. These can be short, simple, and created in Word—they just need to summarize the most essential talking points in language people can understand and repeat.
- **PowerPoint decks** that can be easily updated and shared. These are easy to tailor to different audiences and situations and more cost-effective than printing a full run of a glossy brochure.
- **Digital annual reports** that are not subject to a three-months-in-advance print calendar may be useful to organizations worried about materials going out of date and can be less expensive to produce.

### ASK FOR WHAT YOU NEED, AND SHOW WHY PHILANTHROPY MATTERS.

During and after a crisis, the stakes are higher for everyone: your organization, your mission, your donors. Some donors may have less capacity, but they may also be inspired by a greater urgency or a newfound appreciation for the work you do. It's okay to ask for what you need, as long as you say why it matters.

Start with your closest supporters—the ones likely to be the most motivated to see your work move forward under new circumstances. At the same time, leverage every broad-based communication to highlight the role of giving at your organization. The more people who understand your mission and think of you beyond the crisis, the better.

Remember, the community needs your work, and donors want to be part of it. You got this.





## SIX MESSAGES OR LESS: WHY THE BEST FUNDRAISING CASES FIT ON A NOTECARD

No matter how grand the mission or complex the campaign, the best fundraising cases can be distilled to a half dozen core messages. When your case is strong down to its fundamentals, the full version might fill a magisterial brochure or an in-depth presentation deck, but the heart of it—the stuff you want every donor to know and feel—should be so absolutely clear and crisply expressed that you could write it on a notecard.

And when you're in a crisis moment, you need to make sure you're equipping your stakeholders (and everyone speaking on your behalf) with very clear, distilled messages. So let's talk more about why this matters, why we struggle with it, and how to get there.

### WHY FOCUS ON CORE MESSAGES?

When we refer to messages, we're talking about a simple expression of an idea that is designed to move an audience. For our purposes, that means that it distills something essential about your case into a single sentence using simple, direct language.

- In one of our city's wealthiest neighborhoods, the challenge of hunger is much worse than most of our neighbors recognize.
- This campaign is about all the learning that happens outside the classroom.
- If you care about climate action in our region, this is the smartest way to make a difference.

You can imagine the supporting bullet points that would fall under each of these messages, but each message itself is crisp, simple, and self-sufficient. Most of us aren't in the regular habit of thinking in such distilled terms, and our sector's traditional vehicle for case development is a long narrative case statement that makes it all too easy to avoid committing to core messages. But when you build your case around simple core messages like these, some very useful things happen:

1. **They challenge you to speak directly to what really drives your donors.** We work hard to write about our organizations in their full complexity and nuance, but when you ask donors why they give, they usually give simple answers full of heart. This is our cue to build cases and communications around those core motivations, and let the complexity follow as supporting points where needed.
2. **They give your fundraisers confidence.** When you put a 12-page case statement in your board members' hands, they feel intimidated at the prospect of communicating it in their own words. When you give them four to six key talking points you'd like them to weave in while speaking in their own voice, they think: "I can do this."
3. **They equip you to communicate easily across a range of media.** Sometimes having a beautifully rendered case statement in the traditional long-narrative format is like having a finely engineered luxury car...in your basement. Meanwhile, if you know the core messages you want to hit and you've got some supporting language around them, everything from writing speeches and planning social media to producing print pieces and presentations feels like running downhill.



This is why we believe that strong, well-defined messages are the building blocks of a strong case.

### WHY DO WE STRUGGLE WITH THIS?

Ok, messages good, got it. If the case for a message-driven approach is such a slam dunk, then why aren't we all already living the messaging good life?

1. **Writing short is universally difficult.** How often do we owe the people in our professional lives some version of the apology attributed to Mark Twain: "I didn't have time to write you a short letter, so I wrote you a long one." Never mind that he appears never to have actually written or said this. If our riverboating master of the pithy aphorism finds this taxing, it's not going to be easy for the rest of us.
2. **We think major donor cases need the "thud" factor.** True enough, you can't usually secure a million-dollar gift on the strength of a tagline alone. (This is how general-purpose creative agencies sometimes get into trouble when they take on case work.) Any case with a major giving component needs a fair amount of substance and depth—but that doesn't mean we have to write dense thickets of prose. Core messages bring structure to substance, making clear what is central vs. supporting, making longer documents easily skimmable, and giving audiences a way to connect emotionally first and then dig in further to the extent they wish.
3. **Sometimes our ideas aren't clear enough to begin with.** In the craft of distilling core messages, the thinking challenge precedes the writing challenge—and the exercise of trying to write crisp core messages may reveal that we actually aren't all that clear on what we're trying to say: What is our vision? Why now? Why us?

Though these challenges are real, you don't need to be a master writer to get past them. Rather, they respond well to effort and focus.

### MAKING MESSAGES

If you'd like to dig into the craft of distilling messages for not only major gifts but donors at all levels, we have a whole webinar on this subject with dozens of examples and more detailed writing tips. The crux of the guidance, though—our core messages about core messages—might be summarized as:

**Speak to values and identity.** The more we learn about persuasion, the more we come to understand the role that values and identity play in driving any kind of behavior change, including giving. Your core messages are an opportunity to speak directly to how your prospective donors see themselves and their place in the world, and how they want to help you right now.

- **A proof point, not a message:** Every dollar we invest in [education program] generates ten dollars of social benefit and economic impact.
- **Message speaking to values (fairness):** No child should miss out on a great education for financial reasons.
- **Message speaking to identity (smart donor):** This is the smartest investment we can make in our community's future today.



**Start with the [Six Elements of Your Case for Support](#).** Though you might organize or recombine them in the way that best suits your case, the six elements are a good general-purpose starting point for figuring out what messages you need—and asking the right questions to get to a clear core idea for each of them. If you can figure out what your core message relative to each of the six elements is, you're off to a great start.

To see a sample case distilled into core messages based on the [six elements check out this webinar](#).

**Use the simplest, most direct language possible.** Your case messages need to [work out loud in conversation](#), so this is the most important [place to replace jargon with resonant human language](#). Express each core message as a single sentence (no cheating with a bunch of commas and clauses) that you could imagine someone remembering and repeating word-of-mouth.

Meandering and weak: Alongside our recent investments in capital and programs, we must also invest in our school endowment to ensure our strongest future.

Simple and direct: The endowment is the most important investment we can make in our school's future right now.

As Twain apparently didn't actually say, getting to the short version is hard work—and the perfectly distilled one-page case summary is usually the last piece we arrive at in a case development process after writing longer forms along the way. But it's also the most useful and most satisfying. Begin the work today so you're ready for whatever may come tomorrow, with a powerful case that fits on a notecard in hand.



## HIRING AND KEEPING HIGH-PERFORMING FUNDRAISERS

During times of crisis, a strong fundraiser can help your organization chart a path to a more stable, sustainable future. This article lays out a framework for hiring and keeping high-performing fundraisers, touching on salary, candidate identification, interview questions, and retention.

### OFFERING A COMPETITIVE SALARY

High-performing fundraisers will be looking for a competitive salary in their next position. Before you start a search, educate your organization's decision makers on the need to pay frontline fundraisers at or above the market rate, and explain how low pay ultimately undermines donor relationships and the financial well-being of the organization.

This may include:

- Making the case for hiring a strong revenue builder and ensuring the finance leader understands the ROI of philanthropy
- Explaining to HR that a development director's salary is not equivalent to a program director or operations director's salary
- Consulting salary surveys from AFP, AHP, and CASE if applicable, and checking what your competitors or cohorts in the market are paying



These conversations will help you offer a marketable salary with flexibility to hire a high performer. If you still can't offer a competitive salary, discuss special benefits packages that may help you close an offer when salary is not as elastic. Special benefits and workplace flexibility, including remote work or parental leave, help attract and retain valuable employees.

## IDENTIFYING THE RIGHT CANDIDATE

After you've set a competitive salary, the next step is identifying the right candidate.

Beyond passion for mission, listen for measurable evidence of a high-performing frontline fundraiser, including:

- Uncovering new donors and prospects
- Securing and closing gifts faster
- Obtaining high yield gifts
- Making more substantive visits
- Striving to exceed goals
- Setting higher standards for professional excellence

These are all signs of an elite fundraiser—and many revolve around specific metrics. As much as you can, base your recruitment decisions on hard data rather than gut feelings and intuition. Use key metrics for evaluating candidates, such as years of experience, tenure length, size of secured gifts, and funding growth patterns. You should also measure a prospective hire's ability to grow their past and current programs—signs of emotional intelligence are just as important as the data.

## ASKING THE RIGHT INTERVIEW QUESTIONS

You know you're searching for candidates with strong mission alignment and measurable fundraising success. But what questions should you ask during an interview?

The following sample questions can help you uncover a high performer:

- What's your interest in our mission? How does our organization's work resonate with your professional and personal interests?
- Why are you interested in this position and why now?
- What do you consider your most successful role in fundraising? Why?
- What did you raise annually in the last three years?
- What is the largest gift you have solicited and closed by yourself? With a team?
- What was your most complex fundraising experience? What was the size of that gift? What made the experience challenging? If you perceive growth in their answers, get granular: What specific steps did you take to achieve this growth?
- Was this growth directly through you or others?
- How do you track and review your performance in reaching goals?



Asking the right questions and applying them universally among your prospects is important for a balanced assessment. And listening is even more important: hiring managers should spend 80% of the conversation in listening mode.

During the first interview, work to reduce distraction and bias and heighten your ability to listen. The second round of interviews can help you refine your candidate list and qualify your prospects for best fit.

### RETAINING HIGH PERFORMERS

Once you've recruited a high performer, the work continues. Clearly define the role and set reasonable but ambitious goals. Your fundraisers should be involved in this goal setting; build buy-in by defining performance metrics together and explaining rewards for meeting goals.

Beyond these fundamental steps, activities that provide continuous learning and a clear career path for growth lead to greater retention. This is especially true for millennials, who will make up half the workforce in just a few years. Ensure you are having consistent conversations and check-ins to examine employees' progress and performance.

Other ways to retain high performers include:

- Creating opportunities to recognize and honor top performers publicly; most of the time, CDOs get all credit not individual team members
- Giving high performers greater autonomy with clear guidelines, expectations, and goals
- Offering more access to the CEO, board members, and other executives as needed

Performance incentives are also becoming more common for nonprofit fundraisers, as we found in our nationwide study of incentive compensation in healthcare philanthropy.

During both times of stability and times of crisis, following these guidelines will help you recruit and retain high-performing fundraisers capable of moving your mission forward.



Campbell & Company is an employee-owned national consulting firm that helps mission-driven organizations create greater impact through fundraising consulting, communications, strategic information services, and executive search. Since 1976, Campbell & Company has helped over 2,500 clients grow their fundraising results through an integrated approach. In addition, our award-winning executive search team brings a record of success in placing exceptional leaders across the nonprofit sector.

Underlying all our work is a culture driven by integrity, candor, rigor, partnership, inclusion, creativity, and our dedication to collaborating with nonprofits invested in inclusive philanthropy to change lives and move the nonprofit sector toward greater justice.

Visit us at [campbellcompany.com](https://campbellcompany.com) and connect with us on [LinkedIn](#), [Twitter](#), [Facebook](#), and [Instagram](#).