



ADVANCEMENT STAFFING: A DATA-DRIVEN METHODOLOGY

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CAMPAIGN STAFFING: OPTIMIZING TEAM SIZE TO MAXIMIZE OUTCOMES

If your organization is gearing up for its next campaign, thinking about how to achieve stretch goals for an aggressive campaign may be overwhelming. It would be nice if there was a formula to help you plan for the number of fundraisers and support staff you will need at each phase of a campaign. Although the question of how to staff-up for a capital campaign is specific to each organization's strategy and objectives, we can break it down by campaign phase, as well as overall staffing benchmarks.

With decades of experience helping organizations with pre-campaign assessments and readiness planning, Zuri Group deconstructs staffing to be more straightforward and planful. The foundation for strategic staffing is based on the talent and strengths on your team already, your goals for the campaign, and your predicted rate of staff turnover. Nevertheless, we can simplify the uncertainty so that your organization can develop a plan.

First, key metrics will contribute to your planning, so knowing these numbers is a place to start:

- Number of current senior fundraisers and average gift size
- Number of current junior fundraisers and average gift size
- Level of support provided by central Development staff, and ratio of Admins to Fundraisers – heavy support means additional administrative and coordinator staff will be needed, as fundraisers are added (and the same can be said for advancement services and other functions)
- Campaign goal overall, and per year, including the desired dollar amount to reach before the public phase begins
It also has associated cost which few of us measure.

The plan requires a holistic approach as adding gift officers increases demand and needs in other areas. Team members you can expect to recruit:

- **Additional front-line fundraisers** – major/principal gift level, leadership/annual giving level, planned giving, and corporation/foundation giving
- **Additional central Development staff** – for each front-line fundraiser, assistants and coordinators will be necessary for data management and reporting; prospect researchers will be needed to keep portfolios balanced and fresh, and for analytic modeling
- **Volunteer Coordinators and committee members** – with stretch campaign goals, leveraging every avenue for solicitation will help boost participation and keep the campaign’s momentum

Campaign Readiness Fundamentals

Understanding the feasibility of a capital campaign for your organization will require reliance upon a number of different assessments. First, establish a **Campaign Planning Committee** of organization leaders and marketing specialists to define the campaign strategy and messaging.

A strategy will include dollar goals and a roadmap for how to attain those goals, by fundraising department.

Campaign readiness assessments can be performed by third party consultants, or by internal prospect research staff and leadership with oversight from the Campaign Planning Committee. The result is a prospect pipeline, identifying the key donors who are capable of driving interest in the campaign and delivering transformational gifts.

Readiness assessments are essential for identifying the pipeline of prospects, but they are also the time to identify staffing needs and growth

opportunities for the organization. Now is the time to build a plan for increased staffing, write job descriptions, and interview candidates.

- Start with a SWOT (strengths, weaknesses, opportunities, and threats) analysis to determine your staffing composition.
 - Include fundraisers, Development support staff, and Prospect Researchers in your assessment
 - Do the different fundraising levels have different goals? If so, perform one SWOT analysis for each level (major, principal, leadership, annual, planned, and corporation/foundation giving)
- After identifying weaknesses and threats, determine what it will take to fill those gaps. This will be different for every organization, but can distill to the following:
 - Fundraiser capacity vs. portfolio size
 - Average prospect gift vs. prospect capacity, by fundraising level
 - Investment amount per gift to account for travel, expenses, and time to close
 - Average count of staff turnover vs. new staff needed to meet goals

The Fundraiser Formula

With the assessment complete, determine your ideal staffing needs. Of course, you must consider budgets for headcount and resources in your proposal for new staff. First, determine your ideal staffing plan, then align with the budget, assuming some negotiation will need to occur.

1 Average FTE compensation	\$ 100,000.00	\$900,000.00
2 Average gift amount	\$ 1,500,000.00	
3 Campaign goal per year	\$ 150,000,000.00	by department
4 No. prospects in solicitation per year	25	Per fundraiser
5 Average time to close, in years	2	
6 Average length of multi-year pledge	5	
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7 Ideal portfolio size	125	(+/- 15%)
8 Expected dollars per year	\$ 18,750,000.00	per fundraiser
9 Est. number of Fundraisers needed	9	

Sample calculation

Consider this calculation for each department or fundraising level separately:

1. **Average FTE compensation** – this amount should include benefits, and may include travel for front-line fundraisers.
2. **Average gift amount** – within the department’s portfolio, what is the average gift amount overall (some portfolios will outperform others, of course).
3. **Campaign goal per year** – this amount represents the fundraising goal per year, for this department.
4. **Number of prospects in solicitation per year** – how many solicitations does a single fundraiser make over the course of one year?
5. **Average time to close, in years** – a Planned Giving portfolio will have a much longer time to close than a Leadership Annual Giving portfolio. This helps determine the ideal timeline so that fundraisers can anticipate cultivation, solicitation, and closure strategies.
6. **Average length of multi-year pledge** – this helps to right-size a portfolio so that fundraisers have prospects working through the pipeline at all stages. This also helps establish a strategy that will maximize solicitation opportunities before the end of the campaign.

Calculate:

7. **Ideal portfolio size** – take into account multi-year commitments and the rate at which fundraisers can start re-cultivation. Multiply the number of prospects in solicitation (#4) by the average length of a multi-year pledge (#6). It may make sense to add or remove about 15% to the portfolio size, depending on the talent, seniority, and prospect mix.
8. **Expected dollars per year, by fundraiser** – multiply the average gift amount (#2) by the number of prospects in solicitation (#4), and divide that number by the average time to close (#5).
9. **Estimated number of fundraisers needed** – divide the campaign goal per year (#3) by the expected dollars per year, by fundraiser (#8), and add one to account for the total staffing investment (compensation).

Likely, you have most of these fundraisers already, and may need to recruit another 2-4 per department.

The Nucleus Phase

The nucleus phase of a campaign is a test of the prospect pipeline. At this point, establishing campaign committees will be critical to organize strategic solicitation strategies and begin delivering the message of the campaign. During this phase, the Campaign Planning Committee gives way to the **Campaign Leadership Committee**, which then compiles gift committees based on the initiatives laid out for the campaign.

Investment in the fundraising staff begin in this phase, when new fundraisers and support staff are hired, giving them a chance to on-board and establish their portfolios before the silent phase begins. Annual fundraising goals tend to be lower in this phase, as well, alleviating the pressure of high performance right out of the gate. This is equally a chance for your senior fundraisers to establish solicitation strategies for their entire portfolio, giving them a roadmap to hit their goals each year.

The Silent Phase

The silent phase is a chance to ramp-up participation and giving levels, and to count the first rounds of giving before the campaign goes public. At this point, you may need to hire a few more fundraising or support staff to keep the momentum from the nucleus phase, but your fundraising staff should be in place by now.

Increased solicitation opportunities come from gift committees and volunteer groups, reaching out to peers with the campaign message. Now is the time to enlist **volunteer managers** – staff who coordinate the efforts, communicate the initiatives and message, and keep volunteers engaged. The volunteer coordinators also ensure the gift committee members make their own gifts, and often align with Annual Giving or Sustainer Giving programs to retain consistent donors.

The Public Phase

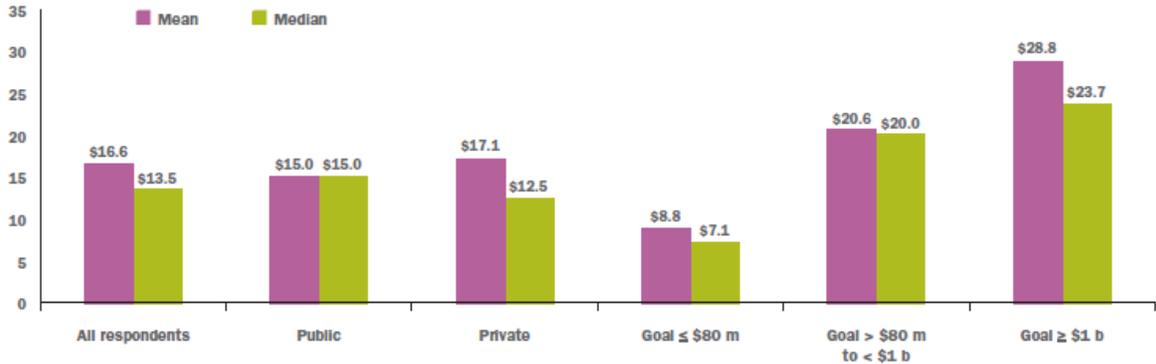
During the public phase of the campaign, staff retention is everything. With established fundraising responsibilities distributed among teams, it is important to maintain the momentum and reduce staff and volunteer turnover as much as possible. However, some attrition can be expected through the duration of the campaign.

Transitioning the staffing plan to a retention and onboarding plan will support any changes mid-campaign, and will smooth the ramp-up for new fundraisers. A balanced portfolio for existing fundraisers will also be able to absorb additional lift if a staff member leaves, ensuring their pipeline prospects continue to move through the solicitation cycle without pause.

What the Data Suggest

A final consideration on how your organization should staff up is to look toward benchmarking data of similar institutions. There are terrific services in the market to help here. Companies like EduVentures conduct peer benchmarking as a paid service, as will companies like Zuri Group. There are some public sets of data on the topic; the most comprehensive come from two CASE sources. One survey completed in 2010 shows that the average gift officer raises about \$10 million during a typical campaign, with around \$25 million per fundraiser for \$1 billion-plus campaigns.

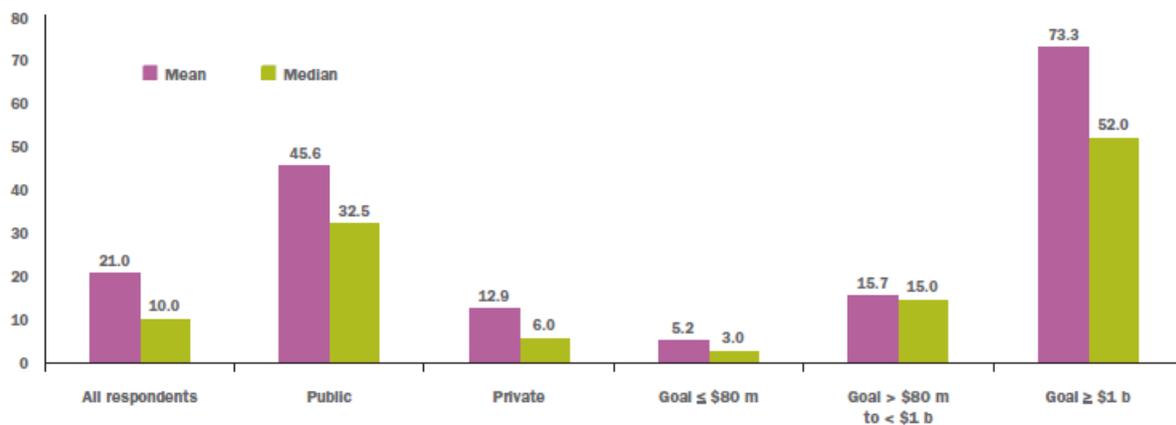
Goal to be Raised per Fundraiser* in Public and Private Institutions and by Size of Campaign
(in millions)



CASE Campaign Report 2010

And, if you are planning a \$1 billion-plus campaign, your gift officer corps should be at least 50 team members. Notice that the average for \$1 billion-plus campaigns is over 70 fundraisers.

Mean and Median Number of Fundraisers* in Public and Private Institutions and by Size of Campaign



CASE Campaign Report 2010

The other CASE survey, in 2013, is useful in showing how advancement teams are organized and funded. In this case, standardized units—such as an average advancement spend of \$953 per student—provide a great tool to determine your organization’s funding. And, using the details in this report you can see that an average of 47% of all advancement funds should be spent on fundraising (see below).

Advancement Discipline Operating Expenses as a Percentage of Overall Advancement Operating Expenses

Category	Fundraising/ Development	Advancement Services	Alumni Relations	Communications & Marketing	Advancement Management/ Leadership	ALL
Public	47.2%	18.3%	11.6%	15.1%	7.8%	100.0%
Private	48.6%	11.6%	13.0%	17.5%	9.3%	100.0%
BA	46.5%	10.9%	15.2%	17.0%	10.3%	100.0%
MA	41.2%	15.9%	12.1%	20.9%	10.0%	100.0%
PhD	50.4%	17.5%	11.4%	13.7%	7.0%	100.0%
Start-up	48.8%	13.0%	11.4%	14.4%	12.4%	100.0%
Emerging	43.5%	15.0%	12.1%	18.2%	11.2%	100.0%
Mature	49.2%	16.3%	12.2%	15.3%	7.0%	100.0%
In a Campaign	48.7%	15.2%	12.1%	15.2%	8.7%	100.0%
Not in a Campaign	45.9%	16.9%	12.2%	17.4%	7.7%	100.0%
All	47.7%	15.8%	12.1%	16.0%	8.4%	100.0%

Source: CASE AIMS Survey, 2012

Make this Matter

Investment in staffing during campaigns is vitally important. Too often, campaigns are understaffed compared to capacity of the prospect pool. Or, leadership chooses an incremental approach to adding staff that diminishes the impact. The result is that less money is raised than is possible (even when campaign goals are met). Your organization would be wise to build persuasive staffing and related resource models early in the campaign (or before!) to gain the buy-in and the budget to staff campaigns effectively. With the right investment in staffing, your organization's fundraising will rise and the net funding available to your mission will grow. You owe it to your organization to see just how much growth you can achieve.

FROM THE AUTHORS

Do you have questions or want to discuss staffing? If you're ready to get started or have questions about where to begin- ***Zuri Group can help!***

We've had the privilege of working with a number of nonprofit and higher education organizations. We're confident that we can help you, too.

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