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Keeping top fundraisers: Factors that influence the retention of high-performing gift officers

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Abstract

Private giving to institutions of higher education is quickly becoming the sustainable solution for many colleges and universities facing decreasing support from the traditional revenue streams. Gift officers are largely responsible for acquiring this necessary philanthropy, yet these professionals are averaging less than two years in their positions, making it difficult for institutions to reap the long-term benefits from donor cultivation. This study investigates the factors that embed an individual and decrease his or her likeliness to job search or leave for another role. Through the application of the job embeddedness framework, high-performing gift officers share their personal stories to better understand how leaders of fundraising departments or organisations can retain their most valuable fundraisers. Specific takeaways are provided on how to leverage links, fit and sacrifice associated with each employee. The opportunity cost is great when gift officers turn over in their roles, and this research may provide the tools and changes necessary to slow the rate of turnover and increase the fundraising productivity of the department and institution.

Keywords

human resources, job turnover, fundraising, gift officers

INTRODUCTION

Private giving to higher education has increased every year since 2010.¹ In 2017 alone, US\$43.6bn was raised by American colleges and universities, an increase over the prior year of 6.3 per cent, or 3.7

per cent adjusted for inflation.² As the need for more private resources increases with the decline of state appropriations and the public outcry of rising tuition, institutions of higher learning will need to become more efficient in bringing in

gifts and grants from non-governmental agencies.

Development officer attrition is a very real problem. Penelope Burk, in her 2013 research³ of over 6,000 development officers found that the average amount of time a fundraiser stays at his or her job was only 16 months. This high rate of turnover negatively impacts an institution's ability to fundraise. To highlight the consequences of job turnover within gift officers, in 2011 the Vice President for Resource Development at Rice University analysed two fundraising campaigns: the first accounted for 3 per cent turnover and the second 5 per cent. The model was based on a staff of 20 fundraisers. After running both models, researchers concluded that the opportunity cost of losing a single gift officer during the campaign was US\$3.67m. Additionally, they estimated that each percentage point of employee turnover accounted for US\$5.5m lost towards the campaign.⁴

The financial consequences of gift officer turnover can be significant for an institution looking to philanthropy for a sustainable source of revenue, but that does not take into account the damage turnover can have on the relationships with donors. One study focused on the adverse outcomes of fundraiser turnover found that donors do find it troubling to transition to another fundraiser, and 13 per cent admitted to the change negatively affecting their philanthropy towards the organisation.⁵ The opportunity cost of placing undue stress on donor relationships is difficult, if not impossible, to calculate, but it indeed does not enhance an institution's ability to fundraise.

Although compensation seems to be a logical solution to decreasing gift officer turnover, researchers have found that less

than a third of gift officers planning to stay indefinitely in their current position said that their salary strongly influences their loyalty.⁶ Based on this finding, it is imperative to seek out what other factors are influencing fundraising professionals to remain in their role.

This study investigates the other factors that influence a high-performing gift officer to stay with their organisation. Retaining higher performers will have a positive effect on growing meaningful relationships with donors, which in turn leads to increased private support for institutions to overcome the fiscal challenges of increasing operational budgets while lessening the financial burden on students through increased tuition.

LITERATURE REVIEW

The origin of job embeddedness research can be found within traditional studies based on turnover theory. Seminal works such as March and Simon's 1958 book, *Organizations*, and more recent literature focused on an employee's desire and ability to leave their current role.⁷ Turnover theories provide valuable insight as to why individuals leave their jobs, but some scholars began believing that there may be equal value in understanding why employees remain with their organisation. This desire led to the creation of job embeddedness theory.

Mitchell, Holton, Lee, Sablinski and Erez⁸ spent the majority of the 1990s focusing their research on why people leave their jobs before they shifted their interest towards learning why people stay at a job. These scholars found that job turnover research studied on-the-job factors but failed to incorporate off-the-job factors, which also play a significant role in an employee's decision to remain with an organisation. Traditional

on-the-job factors include opportunities for promotion, financial incentives such as pensions and environmental qualities such as workplace culture.⁹ Off-the-job factors include an employee's level of engagement with local civic or religious organisations, involvement on local recreation teams or season tickets to a local theatre or sports team.

Mitchell et al.¹⁰ uncovered measures of embeddedness on-the-job and off-the-job related to an employee's intention to stay at his or her current place of employment. The more embedded an individual is, the less likely they are to search for other jobs, consider other positions or leave the organisation. Taking into consideration both on- and off-the-job factors can help organisational leaders understand how likely their employees are to remain in their current positions.

Typically collected using quantitative measures, job embeddedness studies investigate how an individual's life outside of work, such as family ties, hobbies and religious affiliations, influence their relationship with their professional role.¹¹ In a study conducted by Lee and Maurer,¹² employees were found to have a greater commitment or embeddedness to their children and spouse at home than they did with their organisation. Although the results are likely not shocking to many employers, the ability to predict turnover and implement retention efforts is valuable information for organisational leaders.

As Mitchell et al.¹³ explored the aspects of job embeddedness, they were able to establish three distinct attributes of the theory: links, fit and sacrifice. Links refer to the connections an individual has to the people and things within their personal and professional environments. Fit describes to what extent an individual's lifestyle and career aspirations align with

their current situation. Finally, sacrifice is a measure of how easy or difficult it would be for an individual to break the links established in the first attribute. The combination of these three characteristics provides insight as to how embedded an employee may feel in their current role.

Current literature supports that an individual who is less embedded in their role displays a greater tendency to job search and puts forth less effort, ultimately resulting in higher turnover rates.^{14,15–17} Ramesh and Gelfand¹⁸ compared cultural differences between employees from the United States and India using the three components of the job embeddedness framework. The researchers determined that fit was a better predictor of job embeddedness with US employees while links embedded an employee from India in a stronger manner.

The implications of job embeddedness research directly benefit organisations seeking to retain their employees using data-based evidence. Organisational adjustments such as career track planning, flexible workday schedules and community engagement opportunities for employees may influence on-the-job factors, which affects embeddedness. Indirectly, employees benefit from job embeddedness research as changes made to their organisational environment may lead to increased job satisfaction. Additionally, one scholar claims that 'the more an individual is job embedded (or social enmeshed) in an organization, the more likely he or she should be to display citizenship behaviors' (p. 714).¹⁹ Employees who display high levels of citizenship behaviour go above and beyond expected performance, bring greater levels of collaboration among teams and take on more responsibility in formal and informal ways.

STUDY DESIGN

The intent of this study was to explore how the three tenets of job embeddedness may help retain high-performing gift officers in higher education. With an average tenure of 16 months for fundraising professionals and the high cost of replacing gift officers, it is beneficial to gain insight as to what gift officers value in their current role.²⁰ High-performing gift officers were specifically targeted as these are, likely, the employees that leaders are most interested in retaining.

For this research, high-performing gift officers have been classified using a designation given by Reeher LLC. Reeher LLC, since purchased by Blackbaud, Inc., began awarding the title of Prime Officers in 2017 to identify the top-performing gift officers across all the colleges and universities on their platform. The criterion for selection as a Reeher Prime Officer was to be among the top 9 per cent of gift officers on the platform in key activities such as gift officer visits and submitted proposals over US\$25,000.

Eight gift officers were selected to participate in the study. These gift officers ranged in experience from 2 to 16 years and were currently employed at four-year institutions in the United States. Each gift officer was met with in person and asked a series of open-ended questions relating to the on- and off-the-job connections to their job and community. Interviews were completed in April and May 2018 with analysis following in the summer of 2018. One specific research question was used to guide the interviews and ultimately result in applicable action items:

What considerations do gift officers take into account when determining

their satisfaction/embeddedness with a fundraising position and their organisation?

To ensure accuracy, interviews were recorded, transcribed and returned to each participant where they could review for edits or add additional context to their statements. Once transcripts were approved by each participant, the data was analysed using a qualitative coding process to identify similarities and differences within the interviews. Coding the data allowed themes to naturally emerge from the interviews and assist in answering the research question.

RESULTS

Participant interviews resulted in valuable data answering the research question and addressing the three pillars of Mitchell et al.'s²¹ job embeddedness theory: links, fit and sacrifice. As described in the study design, interviews followed a semi-structured model with questions focused on the participants' links, fit and sacrifice. Additional supporting themes also emerged after coding and synthesising the data and will be discussed in this section.

Links

After analysing the responses centred around which links connect a gift officer to their current position, four unique themes arose. Those themes were geography, community involvement, ties to their Alma Mater, and both immediate and extended family. Each of these themes falls within the category of off-the-job factors. Although some on-the-job factors were mentioned throughout the interviews, they

were discussed significantly less than the themes listed earlier.

Six of the eight participants currently worked in the location where either they or their spouse had grown up and made specific comments as to the importance of the city. Five of the gift officers had at one point moved away and then returned as they felt a personal connection to their respective location. One gift officer described the pull to return to her hometown as, 'It's [my spouse's] home and my home. We both went to high school here. We both went to college here, and so it's just where we're grounded' (p. 113).²² One participant noted that her husband's business is located in the town where they reside which will likely mean they are committed to that area for as long as he wants to be in business.

Nearly all participants noted something specific about the geography and culture of their current location as being something they value or desire. From the availability of their favourite hobbies, such as waterskiing and snowmobiling, to the comfort of a small, midwestern town, these themes arose as a significant link to their current location.

All the participants listed off several community organisations of which they either volunteer with or serve in a leadership capacity. Several included that they often are sought out by local non-profits because of their development skills and respondents took great pride in their ability to coach their child's youth teams and volunteer with religious organisations. One participant spoke of the change he saw in himself after getting more involved in his community.

I feel so much more connected here. I would say just my selfishness before moving here, I wasn't involved in the local communities at all. If you were to

give me a percentage it would be 100 times more involved with [this community] than I've been other places. I think I've grown up by being here and I think I've grown up because [my job] helped me grow up. (p. 116)²³

Five of the eight participants hold at least one degree from their place of employment and spoke highly of their ability to serve and give back to their institution. Many spoke of their experience as a student and how those memories have influenced and shaped the way they can effectively work with donors. One gift officer combined the theme of Alma Mater and family when she shared a story of her family's legacy with their institution.

My grandfather's the oldest living alum [from the institution's] pharmacy school. He's 96, he and my grandmother, who are both still alive, got married on campus. It's the same church that my parents got married in, on main campus. All three siblings and I did. . . . There's over 30 degrees received by [my family] from [this institution]. (p. 118)²⁴

Familial links were by far the strongest connection detected as seven participants had children (young or grown), in-laws, or grandchildren in the immediate area. The only participant without family in close proximity belonged to the monastery as a monk and considered those relationships to be closer than family. Job embeddedness scholars often use the word 'stuckness' to describe the web of links holding an individual to a certain role, and it was clear that familial links stood out to all participants as the greatest pull to stay where they are currently.

Fit

Three major themes arose when participants were asked how they felt they fit

with their current position. Again, community came up as a significant aspect and their passion for their work and the mission of their institution. These themes align with the description Mitchell et al.²⁵ use to explain fit, highlighting that 'an employee's personal values, career goals, and plans for the future must fit with the larger corporate culture and the demands of his or her immediate job' (p. 1104). Participant responses covered both the off- and on-the-job factors that influence embeddedness.

Community, an off-the-job factor, was a fit for each of the participants as they listed off a variety of connections, such as church, children's schools and climate, as reasons for why they feel they are in the right location. Several cited specific examples of why their respective city was perfect for them, but one gift officer shared his general appreciation by sharing that he and his wife 'really love [this city] for what it is, regardless of having spent our lives here. We have, I think, philosophically, politically, we feel like we fit [this city] and we think it's a great place' (p. 121).²⁶ A natural transition occurred in many of the conversations from how much they valued their community to how much they believed in their organisation.

One gift officer stated, 'I could go and work at 100 other places and work fewer hours and get paid \$50,000 more. I get calls about them. Then it goes back to the loyalty piece, and we're really passionate about what we do' (p. 122).²⁷ Another told a story about how much pride he has when he tours a new donor around campus and explained that the philanthropy that gift officers facilitate for higher education is enduring and has an impact that will last longer than just one lifetime.

Having passion for higher education was evident in many of the participants' responses and showed a clear fit with their current role. Many of the participants had a variety of careers and roles prior to becoming a gift officer but they all shared similar reasons for why their current career gave them the most fulfilment. One gift officer had completed his undergraduate and doctoral degrees at an Ivy League institution and put it this way: 'I can teach the students, but I can raise the money that builds the endowment and that lets teaching continue on for generations' (p. 126).²⁸ The theme of passion for higher learning and perpetuation of education was a common thread among each interviewee.

Closely related was the theme of an employee's belief in their institution's mission. Several participants worked at faith-based schools and discussed its impact on their daily work. Some claimed their connection to the institution's mission right away, and others developed an affinity over time. One gift officer joked, 'To tell you when I took the job four years ago, I'd be so passionate about the mission here, I would have told you you were crazy, but I am!' (p. 125).²⁹ This feeling of affection towards the institution shows embeddedness and decreases the likelihood of turnover.

In one response, the gift officer mentioned prior to his current institution, he was always keeping an eye open for the next position or promotion, but now for the first time he feels a sense of contentment with his situation. He was quick to clarify that his contentment was not out of complacency, but out of a 'satisfaction with what I do here and where I am' (p. 125).³⁰ A similar response was given by another gift officer who shared 'that it's hard for me to imagine where I would go where I would feel like there

was a mission that I was more passionate about or really wanted to impact more' (p. 124).³¹ These strong statements regarding the way their values fit their institution's mission make a strong case for their embeddedness within their role and environment.

Sacrifice

The sacrifice of breaking the aforementioned links and fit can also play an integral role in how embedded an individual is with his or her current job. If an employee has weak links or fit, the person would not be sacrificing much if he or she left the organisation.

Overwhelmingly, the loss of contact with their donors was the brought up as one of the biggest sacrifices of hypothetically leaving their role. One went as far as saying that if his two largest donors were to pass away tomorrow, he would retire from his position because he placed so much personal value into their relationship. As development work is heavily built upon relationship building and deep connection with donors, it is not surprising that sacrificing the relationship with their donors was too much for many of the gift officers to even consider leaving their organisation.

Closely related, several participants alluded to missing the travel associated with their current role. A few spoke critically of the demands of the job citing that they average 35,000–40,000 miles per year on their personal vehicle, but others highlighted the perks of their job travel. One participant appreciates how her travel energises her and provides value to her life.

I loved that I got to San Francisco and experience that part of California that I've never seen before. And it keeps my world big. If I just went and drove into

[the office] every day and worked, I would go crazy. (p. 132)³²

Another spoke about the international travel opportunities he has had because of his role. He also mentioned that so many of his personal interests are the result of meeting and developing relationships with a diverse group of donors.

A third theme developed in regards to sacrificing culture and people within their organisation. Several specifically mentioned their relationship with their supervisor and how much they valued that person in their life. Others spoke about the institution in general about how it seemed irreplaceable and warned against the mentality that the grass is greener on the other side. When asked to hypothetically consider leaving his current role, one gift officer had trouble envisioning a better environment.

It would be tough to find another athletic department or job that had such a strong mission and purpose compared to what we have [here]. I also find it hard to believe that I will walk into a place that has a stronger culture and work ethic especially of what we have here in athletics. (p. 128)³³

One of the strongest themes throughout the analysis includes the familial ties. Whether it be the convenience of having extended family in town or a commitment to keeping their children in the same K–12 school district, participants gave a variety of examples of the family sacrifices they would have to make if they were to leave their current role. A gift officer shared his hypothetical struggle over taking another job and sacrificing his children's relationship with their grandparents. The weight of these hypothetical situations was

visible and solidified the importance of the role sacrifice plays in an employee's embeddedness.

Additional themes

Compensation and professional responsibilities were two additional areas that all participants addressed at one point during the interview. These on-the-job factors have the ability to be a link, fit or sacrifice for individuals and have a direct correlation with embeddedness and turnover.

When asked about compensation, specifically the salary associated with their role, seven of the eight gift officers responded that they believe they are being fairly compensated for their work. As participants discussed their salary, many brought up auxiliary benefits they received as an employee that they valued. Benefits mentioned specifically included flexibility within their workday, a healthcare and retirement package, and tuition waivers for their children. Gift officers acknowledged the value in these benefits and used words such as 'grateful' and 'indebted' to describe how they felt about their institution's investment in them and their families.

While discussing compensation, three of the gift officers took a unique stance on how salary can influence office culture. Two of the participants specifically stated that instead of receiving a raise or bonus for their work, they would prefer that excess funds be distributed to the junior members of the staff who are working hard to build a career in development. They noted that they understand the consequences of turnover within fundraisers and would rather see an investment in the young professionals and the future of the department. One gift officer voluntarily

offered to reduce his hours and pay by 20 per cent during a time of budget reductions to ensure his colleagues would not be financially affected by the crisis.

The second theme that arose revolved around career planning and responsibilities within their role. The idea of managing others garnered a polarising response from participants. Three who were over the age of 55 and two more who had previously been in a management role all said that they were not interested in taking on any management responsibilities in the future. The remaining gift officers desired to rise in the department ranks and knew that supervising others would be a necessary step for them to take to achieve their professional goals. The desire for greater professional growth is not uncommon. Burk's research³⁴ found that 41 per cent of fundraising professionals accepted another role that offered greater responsibilities.

Participants mentioned alternative roles or projects that would provide additional motivation and satisfaction for them in their current role. Several brought up the option of working on larger gifts or special projects for their institutions, while over half referred to the influence a fundraising campaign had on their position. Two gift officers said they were midway through a campaign and wanted to see it through to completion, while two others said their organisation was planning for a campaign and expressed interest in learning about the process and partaking in the journey.

Collectively, the themes found as a result of the eight interviews with high-performing gift officers help shape an understanding of what factors drive an individual to feel connected and

embedded within their organisation. The managerial implications of this data may help increase workplace satisfaction and embeddedness while reducing job-seeking tendencies that lead to turnover.

ANALYSIS

The application of this data will vary for each institution and department, but valuable insight can be gained from the experiences and perceptions of the study's participants. Using the framework of job embeddedness theory, managers should see value in assessing an individual's links, fit and sacrifice as it relates to the employee's current role. Specifically, off- and on-the-job factors can be monitored to increase employee satisfaction and retention of the gift officers that managers seek to retain. Using the data collected from this study, potential strategies to increase job embeddedness are listed here for managers and employers to implement as they see fit for their organisation.

Off-the-job factors

It is difficult, if not impossible, to identify or accommodate every off-the-job factor, yet because the data continuously supports the importance of these factors, it would be beneficial to take a mental or physical note of what those factors are for employees. For some, these factors may include having family in close proximity, the ability to volunteer with local organisations, or living in a community that embodies and promotes the values, hobbies and characteristics that align with their views. Taking inventory of what off-the-job factors are valued by each employee could occur formally in a scheduled meeting or casually in a social setting. These factors should be

considered potential tools for improving employee satisfaction and offer creative solutions when on-the-job factors, such as salary or travel demands, are more difficult to manipulate.

Supervisors looking to decrease turnover in gift officers lacking some of these traditional off-the-job factors may consider creative and potentially low-cost alternatives. Consider adjusting the territories or donor portfolios to match a certain area of the country where a gift officer's family is located. This would allow the employee increased opportunities to see family and friends while conducting work pertinent to their job. Alternatively, other employees may value a flexible work schedule so they can volunteer within their community or attend their children's events. Perhaps the entire department could participate in a volunteer activity within the community to foster new links between employees and their surroundings. The data supports that creating more links for employees will attribute to greater embeddedness within their professional role and ultimately lead to increased job satisfaction and performance.

On-the-job factors

Leaders may find it easier to control or adjust on-the-job factors because they are typically within their control. Supervisors should discuss on-the-job factors regularly with their employees to understand the values and perceptions of each person. These conversations do not need to be lengthy, but rather transparent and genuine. If a supervisor can clearly articulate the value an employee brings to the organisation and they want to ensure, to the best of their ability, that the ways they are compensated and motivated are meeting their needs. This level

of transparency would facilitate increased fit and sacrifice for the employee.

Several of the participants spoke of the pride and satisfaction they felt from perpetuating the work of higher education. This link to mission and fit within the institution is something that can be fostered to encourage the embeddedness of employees. Leadership may consider finding ways to involve gift officers in meaningful projects or relationships across campus that have been directly impacted by philanthropy so they can witness their role within the larger organisation. For example, a gift officer could be invited to attend the class period where students present on their study abroad experience which was funded through a gift that they helped secure. These small moments could shape an employee's connectedness and belief in the organisation in which they serve.

Participants overwhelmingly agreed that giving up the relationships they held with their donors would be the greatest on-the-job sacrifice if they were to leave their current role. Supervisors should be encouraged to find ways to increase their employee's ability to contact, cultivate and steward their donors. The strategy could include increasing travel budgets to ensure that gift officers have the financial resources required to deepen those relationships, but could include other, less expensive ways, to promote relationship building. One potential strategy is to ask gift officers what policies or regulations limit or prevent them from working most efficiently. Depending on your organisation, supervisors may hear how employees have difficulty navigating the process to be reimbursed for their travel or issues they may have had securing small gifts they wish to give to donors. Additionally, there may be opportunities to implement new technologies making it easier

to document, track, or contact donors, ultimately making the job of a gift officer easier. Removing barriers for gift officers to allow gift officers to focus their efforts on donor relationships will lead to increased performance and job satisfaction.

Although supervisors likely cannot control which institution their employees claim as their Alma Mater, the link of working at one's Alma Mater was one of the strongest identified in this study. Organisations could attempt to foster some of this connectedness by including non-alumni employees in new student orientation activities, convocation, commencement or sporting events. Many institutions have a defining tradition (ie school song/cheer, painted rock) that foster comradery of all those who have participated. Allowing non-alumni development employees to be involved in these traditions can make them feel like an honorary alumnus/a. Not only will those employees feel more connected to the institution, but they also may share a deeper understanding with the alumni they meet with who have a similar memory. Professionally, supervisors can engage gift officers with the institution by sharing larger institutional goals or strategic planning efforts, so employees feel invested in the future of the organisation. Several of the participants mentioned their intention to remain with their employers through the completion of their current fundraising campaign. Acculturating employees to both the tradition and strategic mission of the institution may promote feelings of belongingness and fit.

The themes derived from this study have some limitations as a result of the number of participants, the variety of institutions represented, and the specific focus on high-performing gift officers.

Regardless of these limitations, the findings are believed to be largely generalisable for the larger population of higher education fundraising professionals. By using the job embeddedness framework assessing the links, fit and sacrifice, it is possible to reduce job-seeking tendencies and turnover within gift officers.

CONCLUSION

There is little disagreement among scholars that philanthropy will play a vital role in the future sustainability of higher education. Despite this fact, the individuals responsible for cultivating that philanthropy are leaving at an alarming rate, ultimately slowing the progress for the entire institution. Mitchell et al.³⁵ contend that seeking to understand why gift officers remain in their roles requires viewing the issue through the job embeddedness theory to provide applicable insight on how to retain employees.

Factors of links, fit and sacrifice help to define what types of off- and on-the-job factors influence an employee's likeliness to job search or leave their current role. Supervisors can decrease those job turnover tendencies by focusing on features of job embeddedness important to their employees. Data from participant interviews offers insight as to what high-performing gift officers value in their personal and professional lives. This insight can shape how a supervisor supports and retains individuals within their own organisation. If supervisors can slow the turnover rate, there should be great confidence in the organisation's ability to improve employee satisfaction and overall fundraising production.

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