

TIP SHEET

5 Ways to Manage Gift Officers to Avoid the Year-End Waiting Game

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We've all been there; it's three weeks before the end of the fiscal year and we need one more solicitation to reach our goal. This is not only anxiety-inducing for the officer, but also potentially detrimental to the donor's impact if we're rushing an ask. It doesn't have to be that way. Here are ideas to make a stress-free December a reality.

1

Create solicitation timelines.

Just like any project or goal, it can be helpful to have a deadline in mind (even if the deadline is self-imposed). Have your officers evaluate their assigned prospects based on their relationship and philanthropic conversations so far. Then lock it in by creating a proposal that includes a target date and a target amount. Keeping all plans in the form of proposals offers you and the officer a quick glance at pipeline—both status to goal and monthly distribution. If the year is a little light or December looks a little heavy, you can make adjustments mid-year. This tracking is simple when your [fundraiser management software](#) tracks upcoming proposals by solicitation status.

2

Break down goals into bite-sized pieces.

Especially for training officers or organizations for which personal metrics are new, think about splitting annual goals into quarterly goals. This builds consistency quarter-after-quarter so officers are not trying to pack a year's worth of solicitations into December. It also makes the goal much more manageable—a quarterly proposal goal of five sounds much more feasible than an annual goal of 20.

It also offers officers a “reset,” so a bad quarter doesn't turn into a bad year. If the quarter seems unwieldy to think about or if one of your officers is struggling to make progress—consider breaking it down to months or even weeks! An officer who makes 3 visits a week would have 150+ visits by the end of the year.

3

Review progress frequently.

Don't wait until year-end to review metrics and have guiding conversations with your officers! By December, both you and an under-performing officer are in panic mode. Instead, at every 1:1 meeting you should review recent and upcoming visits, recent and upcoming solicitations, and dollars raised to-date. This offers plenty of coaching opportunities and creates a culture of data-driven fundraising. It is simple to track these metrics using dashboards within [fundraising software](#).

4

Create a culture of transparency.

Use team meetings to review upcoming proposals with target dates in the next month or quarter. Ask the officer to share their strategy and next steps; allow for brainstorming or feedback from the team. Knowing that the team's eyes will be on them at the next meeting might spur action preventing a year-end rush.

5

Celebrate successes throughout the year.

How do you recognize good work and top performers? Similar to the concept of "employee of the month," think about creating a "Visit Leader" or "Solicitation Champ" of the quarter to reward the actions that drive production. Have officers share gift stories (both hairy and gratifying!) and praise the creative solutions utilized or challenges that were overcome. Don't wait until the end of the year to make sure achievements are acknowledged!

Find out how [Blackbaud Fundraiser Performance Management](#) helps you keep your team on track.

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