

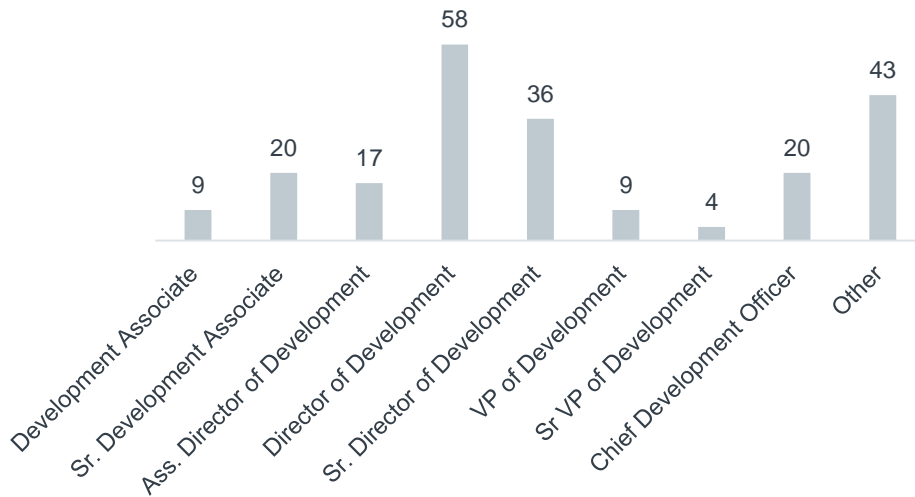
# Appendix: Engineering the Major Gifts Enterprise

## Results from a 2017 Performance Survey of Health Care Major Gift Officers

### Participant MGO Demographics

#### 1. What is your position level?

n=216



Title	Percentage	No. of Responses
Development Associate	4%	9
Senior Development Associate	9%	20
Associate Director of Development	8%	17
Director of Development	27%	58
Senior Director of Development	17%	36
Vice President of Development	4%	9
Senior Vice President of Development	2%	4
Chief Development Officer	9%	20
Other	20%	43

**2. How long, in years, have you worked in major gifts fundraising (include all past and current roles)?**

Average	13
Median	12
Minimum	0
Maximum	40
No. of responses	196

**3. How long, in years, have you worked at your current institution (include all past and current roles)?**

Average	7
Median	5
Minimum	0
Maximum	35
No. of responses	198

**4. How long, in years, have you worked in major gifts fundraising at your current institution?**

Average	6
Median	4
Minimum	0
Maximum	30
No. of responses	192

**5. Select the dollar range into which your current annualized total compensation falls:**

n=186



Salary Range	Percentage	No. of Responses
\$25,000 to \$49,999	1%	1
\$50,000 to \$74,999	10%	18
\$75,000 to \$99,999	26%	48
\$100,000 to \$124,999	25%	47
\$125,000 to \$149,999	13%	25
\$150,000 to \$174,999	7%	12
\$175,000 to \$199,999	6%	11
\$200,000 or more	13%	24

## Individual MGO Performance Evaluation

### Individual Revenue:

#### 6(a). What was your stated performance goal for the last completed fiscal year?

Average	\$1,882,926
Median	\$1,000,000
Minimum	\$13,443
Maximum	\$15,000,000
No. of responses	137

#### 6(b). What was your actual performance against your goal in the last completed fiscal year?

Average	\$1,956,047
Median	\$1,303,035
Minimum	\$18,500
Maximum	\$16,000,000
No. of responses	167

### Face-to-Face Visits:

#### 7(a). What was your stated performance goal for the last completed fiscal year?

Average	97
Median	100
Minimum	5
Maximum	240
No. of responses	100

#### 7(b). What was your actual performance against your goal in the last completed fiscal year?

Average	98
Median	90
Minimum	2
Maximum	305
No. of responses	138

**Solicitations:**

**8(a). What was your stated performance goal for the last completed fiscal year?**

Average	23
Median	20
Minimum	5
Maximum	300
No. of responses	87

**8(b). What was your actual performance against your goal in the last completed fiscal year?**

Average	25
Median	18
Minimum	1
Maximum	400
No. of responses	132

**Gifts Closed:**

**9(a). What was your stated performance goal for the last completed fiscal year?**

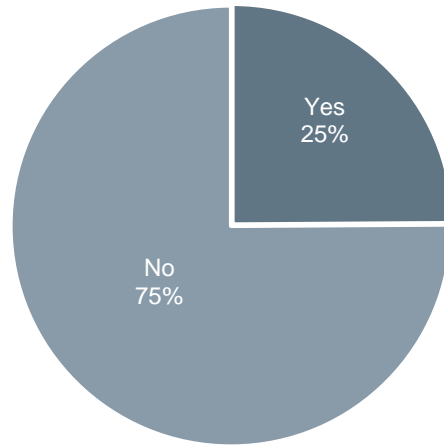
Average	11
Median	10
Minimum	0
Maximum	40
No. of responses	34

**9(b). What was your actual performance against your goal in the last completed fiscal year?**

Average	17
Median	13
Minimum	0
Maximum	70
No. of responses	93

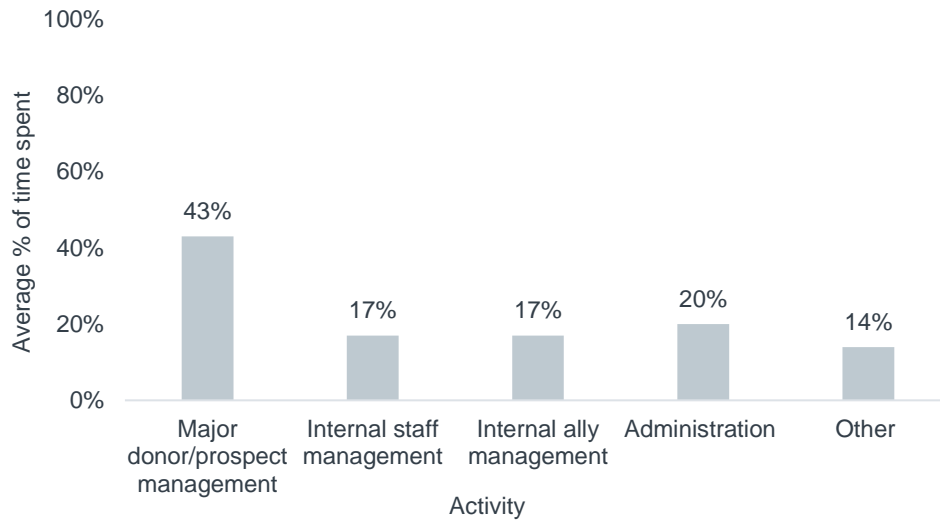
10. Do you have formal individual goals around physician or faculty engagement (e.g., number of physician allies engaged, number of physician meetings conducted, number of physician referrals gained, etc.)?

n=193



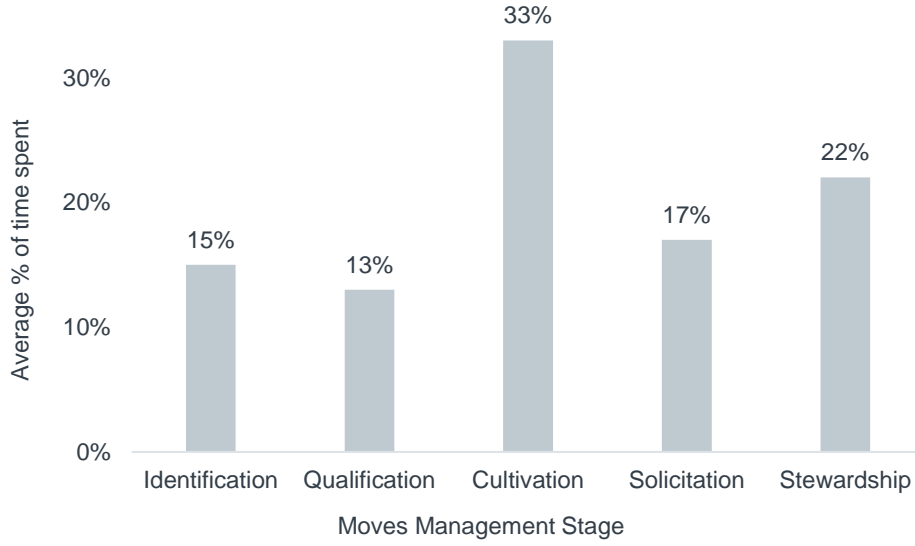
# Individual MGO Activity Evaluation

## 11. What percentage of your overall time do you spend on the following activities?



Activity	Average	Min	Max	No. of Responses
Major donor/prospect management (includes all stages of the moves management cycle, from identification through stewardship)	43%	5%	80%	193
Internal staff management (e.g., training, mentorship)	18%	0%	80%	172
Internal ally management (includes clinicians, volunteers, and executives)	17%	0%	65%	180
Administration (e.g., database management, internal meetings)	20%	0%	60%	187
Other	15%	0%	80%	81

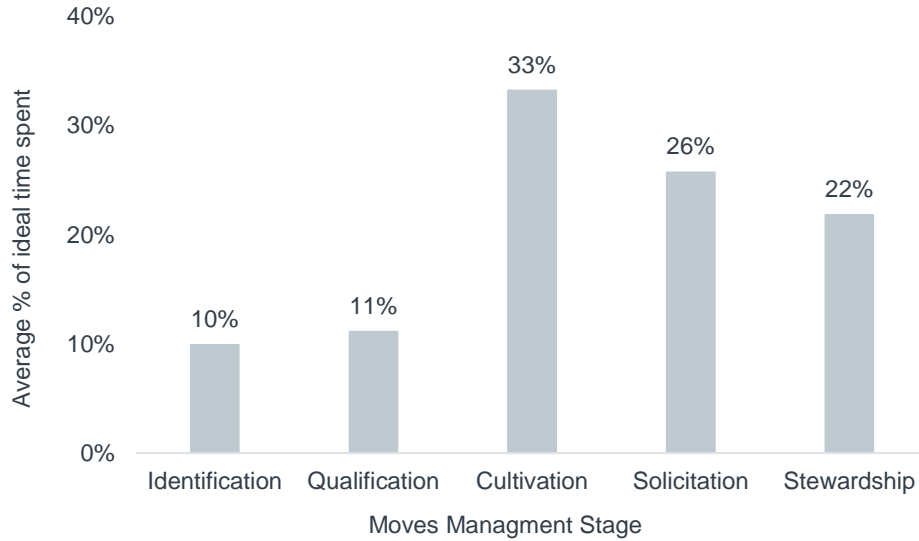
**12. Of your time spent managing major donor/prospect relationships, estimate the percentage of time you spend on each stage of the moves management cycle.**



Stage	Average	Min	Max	No. of Responses
Identification	16%	0%	60%	176
Qualification	13%	0%	55%	184
Cultivation	33%	5%	75%	185
Solicitation	18%	5%	60%	187
Stewardship	22%	5%	80%	186

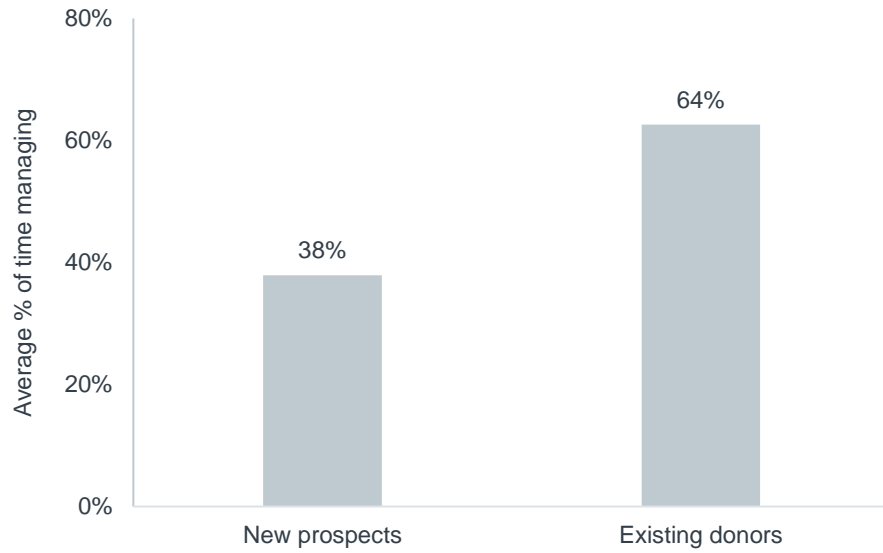


**13. Of your time spent managing major donor/prospect relationships, estimate the percentage of your time that you would ideally like to spend on each stage of the moves management cycle.**



Stage	Average	Min	Max	No. of Responses
Identification	10%	0%	50%	164
Qualification	11%	0%	40%	174
Cultivation	33%	10%	75%	183
Solicitation	26%	5%	80%	184
Stewardship	21%	5%	60%	182

**14. Of your time spent managing major donor/prospect relationships, estimate the percentage of time that you spend on new prospects versus existing donors.**



Item	Average	Min	Max	No. of Responses
New prospects (i.e. has never made a major gift to the organization)	38%	0%	90%	181
Existing donors (i.e. has previously made a major gift to the organization)	64%	10%	100%	183

**15. On average, how many hours a week do you spend interacting with prospects and donors?**

Average	15
Median	15
Minimum	1
Maximum	60
No. of Responses	183

**16. Rank the top two stakeholders, in order of importance, in helping you secure major and/or principal gifts.**

Overall Rank	Stakeholder	Score <sup>1</sup>	No. of Responses
1	Physicians/Faculty	216	129
2	Board members	167	112
3	Executives (non-fundraising)	130	93
4	Nurses/Other Clinicians	33	27
5	Other	30	23

**17. Rank the two stages of the moves management process that are most important in successfully raising major and/or principal gifts.**

Overall Rank	Stage	Score	No. of Responses
1	Cultivation	248	151
2	Solicitation	108	80
3	Stewardship	104	85
4	Qualification	76	44
5	Identification	40	24

**18. Rank the two stages of the moves management process that are most difficult to successfully perform as a gift officer.**

Overall Rank	Stage	Score	No. of Responses
1	Identification	208	118
2	Qualification	144	100
3	Solicitation	95	68
4	Cultivation	70	52
5	Stewardship	56	44

1) Score is a weighted calculation based on the ranking of items. Items are given their value in "weight" and score is the sum of all weighted values

**19. Identification: Rank the two most effective tactics, with 1 being most effective.**

Overall Rank	Tactic	Score <sup>1</sup>	No. of Responses
1	Prospect referral from a physician or other clinician	219	133
2	Prospect referral from a board member or executive	192	125
3	Prospect identified from existing annual fund or direct mail donor base	83	63
4	Prospect identified through patient wealth screening	34	26
5	Prospect identified from special event attendance	27	24
6	Other	18	11

**20. Qualification: Rank the two most effective tactics, with 1 being most effective.**

Overall Rank	Tactic	Score	No. of Responses
1	In-person discovery visit	315	171
2	Internal prospect research	98	76
3	Discovery phone call	79	67
4	Event invitation	53	45
5	Low-dollar (acquisition) solicitation	18	15
6	Other	7	6

**21. Cultivation: Rank the two most effective tactics, with 1 being most effective.**

Overall Rank	Tactic	Score	No. of Responses
1	In-person meeting (with physician, board member, or executive)	296	164
2	In-person meeting (gift officer only)	109	78
3	Hospital tour or educational program	97	78
4	Strategic cultivation event (e.g., physician lecture)	50	44
5	Patient rounding, amenities, or concierge services	17	15
6	Large social event (e.g., gala)	4	3

1) Score is a weighted calculation based on the ranking of items. Items are given their value in "weight" and score is the sum of all weighted values

**22. Solicitation: Rank the two most effective tactics, with 1 being most effective.**

Overall Rank	Tactic	Score <sup>1</sup>	No. of Responses
1	Ask made in conjunction with a board member, physician, or executive	258	165
2	Written proposal and in-person ask	242	163
3	In-person ask only	75	55
4	Other	1	1

**23. Stewardship: Rank the two most effective tactics, with 1 being most effective.**

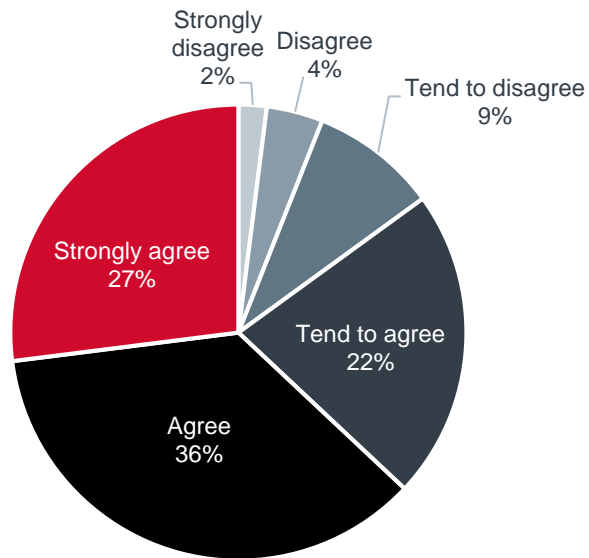
Overall Rank	Tactic	Score	No. of Responses
1	Personal thank you visit	189	111
2	Personalized impact report	143	96
3	Thank you call or letter (signed by physician or patient)	74	47
4	Thank you call or letter (signed by board member or executive)	59	39
5	Hospital tour or educational program	38	29
6	Donor recognition event	35	31
7	Patient rounding, amenities, or concierge services	23	19
8	Giving society membership	10	8
9	Other	4	3
10	Annual report / newsletter	1	1

1) Score is a weighted calculation based on the ranking of items. Items are given their value in "weight" and score is the sum of all weighted values

## Individual MGO Self-Assessment

24. I am confident that I will hit my revenue goal for the current fiscal year.

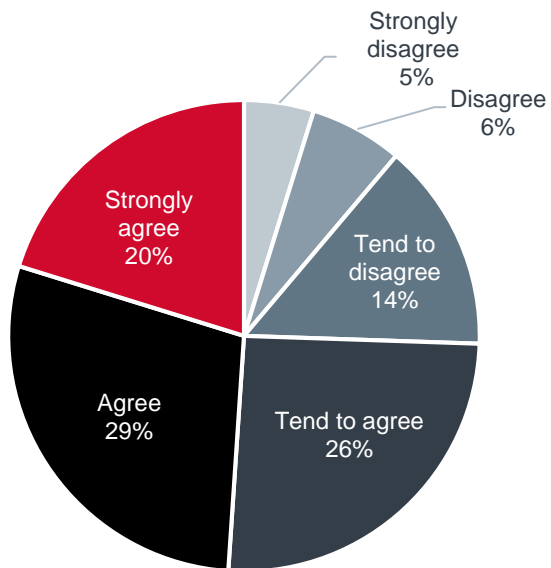
n=192



25. My organization equips me with the training and resources I need to succeed in my responsibilities with regards to:

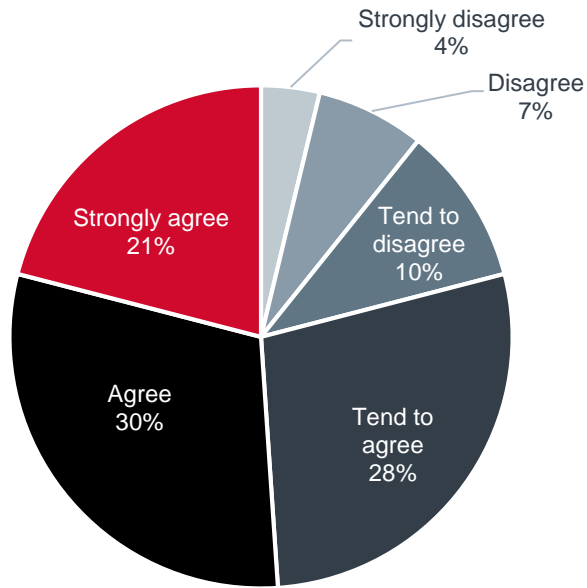
Identification:

n=188



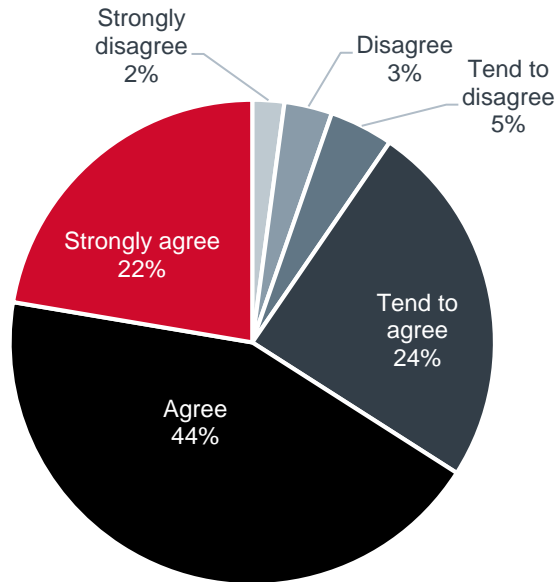
**Qualification:**

n=186



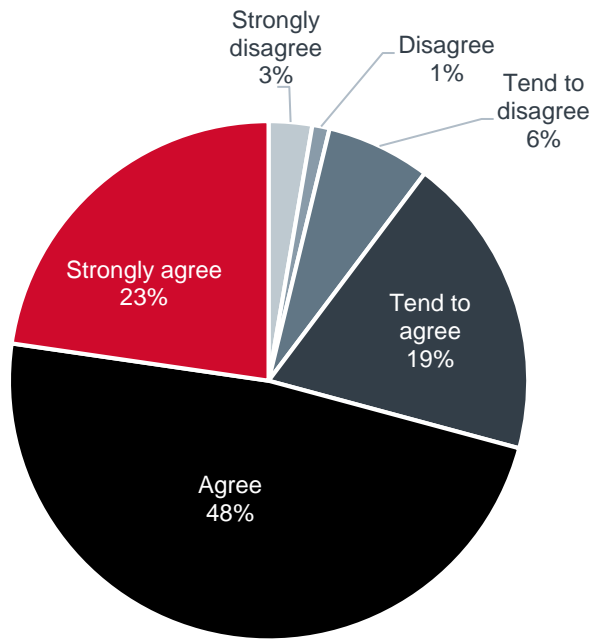
**Cultivation:**

n=188



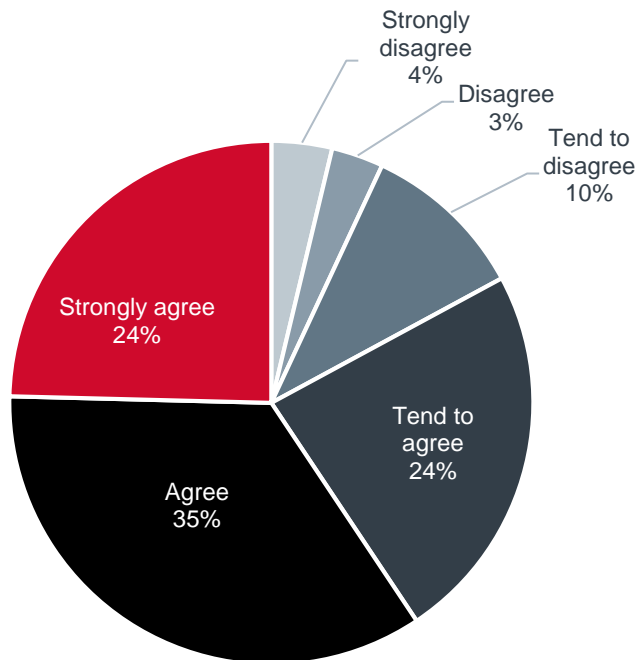
**Solicitation:**

n=185



**Stewardship:**

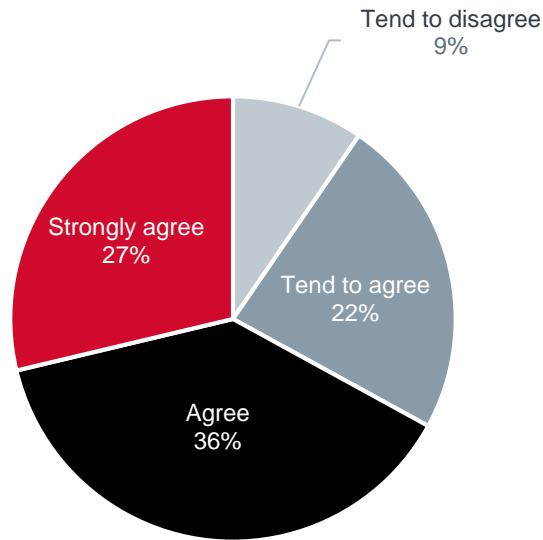
n=187





**26. I am confident in my ability to identify the right timing to make a major gift solicitation.**

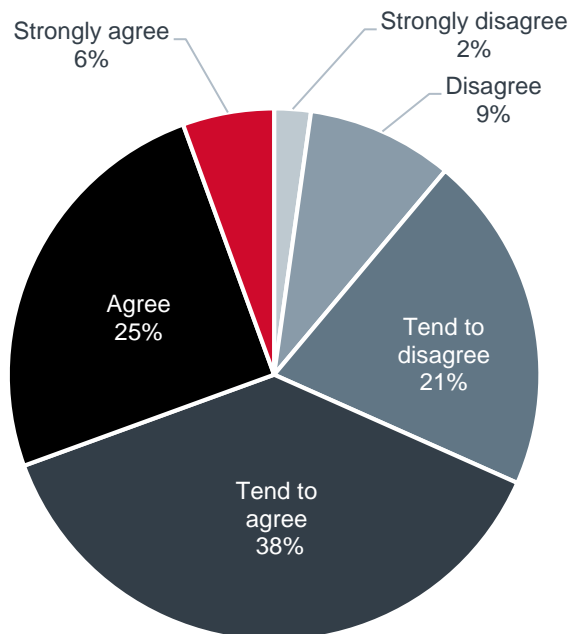
n=187



**27. I believe my donors choose to give to my organization primarily due to:**

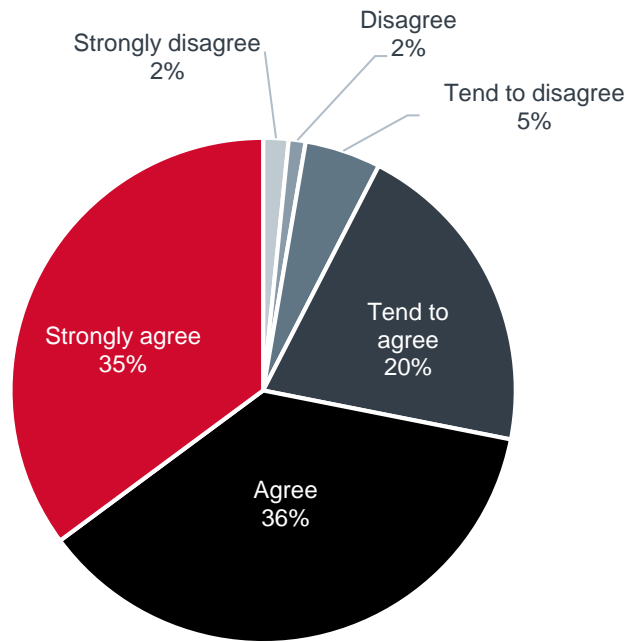
**Personal relationship with me:**

n=180



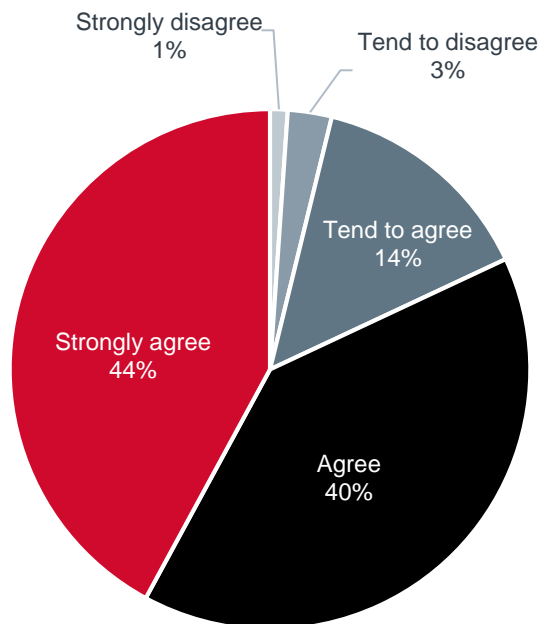
**Personal relationship with a board member, physician, or executive:**

n=185



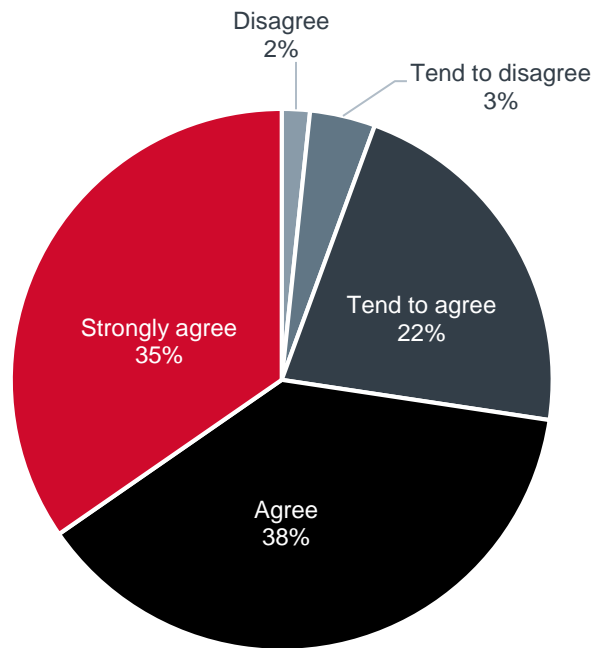
**Strength of the institution's brand and mission:**

n=183



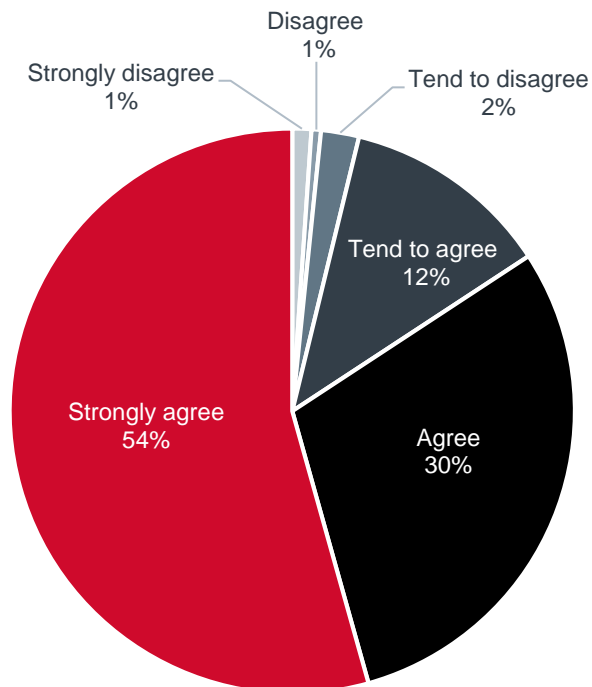
**Strength of the specific philanthropic opportunities we provide:**

n=179



**Gratitude for care experiences:**

n=184



## Individual MGO Portfolio Management

### 28. How many individuals are currently assigned to your portfolio?

Average	118
Median	101
Minimum	0
Maximum	424
No. of responses	172

### 29. Rank the top two criteria in order of their usefulness in prioritizing prospects for your time and attention.

Overall Rank	Criteria	Score <sup>1</sup>	No. of Responses
1	Past giving to your organization	181	112
2	Existing relationships with a physician, board member, or executive	158	98
3	Giving capacity (i.e. wealth screening)	96	75
4	Interest area	56	39
5	Existing relationship with you	55	39
6	Patient history	12	9

### 30. Estimate the percentage of individuals in your portfolio that you personally engaged with at least one time in the last completed fiscal year.

Average	61%
Median	67%
Minimum	0%
Maximum	100%
No. of responses	160

1) Score is a weighted calculation based on the ranking of items. Items are given their value in "weight" and score is the sum of all weighted values