

Aligning Visit Metrics with Professional Ethics



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Visit metrics have always been a valuable way for philanthropy executives to measure and manage their work. There continues to be spirited conversations around what we measure and how we measure it, especially now. For example, visit metrics were always intended to be about proactive, meaningful, objective-driven, intentional interactions to advance the depth or quality of relationships. Typically, since this leading indicator is within the control of the philanthropy officer, visits have been one of the primary indicators used to demonstrate proactive performance towards fulfilling the mission. Further, we know the number of meaningful interactions is predictive of future success in closing gifts.

Despite the value of utilizing metrics as an indicator of thoughtful relationship advancement, we have all seen those philanthropy advisors who “game” their metrics. Those practitioners utilize metrics as a way to rack up points on the board rather than in a way that is aligned with the true spirit and intention of the measure.

The utilization of visit metrics has become even more complicated. While visits were predominantly in person, the pandemic forced organizations to necessarily pivot from face-to-face interactions to phone- and computer-based interactions. Given the success of Zoom and other virtual platforms, it is valuable to keep the platform of virtual visits as part of our metrics.

This is a good time to revisit the understanding, intention and application of metrics. Regardless of the “location” aspect, a meaningful visit:

- 1 Shows intention:** The philanthropy leader takes proactive and thoughtful action to request meaningful time with the donor; it is not just “bumping into” someone.
- 2 Is objective-driven:** The interaction has a clear and specific purpose to increase understanding, to uncover intention or to deepen engagement. There is a thoughtful and known “why” or rationale for the interaction; it is not just “getting together.”
- 3 Advances relationships:** The quality of the interaction meaningfully advances the relationship based upon qualitative or quantitative measures. It is more than just a nice social interaction.
- 4 Uncovers next steps:** Time with a donor or prospect is instructive in illuminating future steps toward advancing the relationship or clarifying the donor’s values and philanthropic intentions as they relate to continued engagement and mission impact.



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Let’s look at metrics from a professional and philosophical level. Metrics are about gauging, managing and understanding performance. Visit metrics have become a way to show our productivity, progress and value as philanthropy officers. How we tally visits comes down to our professional ethics. Professional pressure and internal competitiveness to demonstrate secured and completed visits often surfaces as team members’ metrics are increasingly and transparently shared. We simply cannot generously interpret the quality of donor interaction to claim credit for a visit. While it may initially seem benign to overvalue the quality of an interaction, clearly, those who reflect work that has not been done will be compromised in the ability to be successful down the road. It is about more than undermining your future success as a gift officer...it’s about sacrificing your ethics and integrity.

If we cannot adhere to conducting ourselves with integrity in what we claim or count, we need to question our overall commitment to the field of health care philanthropy. Working the system to meet expectations or to provide an elevated perception of our performance is simply not ethical. It is not aligned with the spirit or intention of engaging and enhancing relationships. Counting casual interactions at an event or passing conversations at a grocery store is not the purpose around the visit metrics effort.

Inflating visit metrics ultimately robs us and our donors of the authentic relationships to which we aspire. Visit metrics are intended to drive intentionality around exploring and understanding a donor's values and objectives. Visits are intended to provide venues for stewardship and demonstration of impact. Visits are intended to allow us meaningful opportunities to articulate the mission, vision and values of our organizations and aligning these with our donors' goals. Failing to fulfill our responsibilities and opportunities to deepen relationships by gaming our visit metrics undermines the integrity of our profession and our integrity as individuals. As philanthropy leaders, we know some of the most meaningful moments of our profession are sitting knee-to-knee or face-to-face with a donor, whether in person or virtually. Therefore, let's feed ourselves and fuel our passion by ensuring visits as demonstrated through our metrics reflect a commitment to ethical practice.

Visit metrics can provide a significant way for philanthropy leaders to demonstrate their valuable engagement efforts, subsequently proving how these philanthropic efforts serve as an important revenue source for the organization. However, for metrics to be truly meaningful, philanthropy leaders must embrace the intention and integrity behind the metrics for their benefit, the donors' benefit and the overall success of the organization.

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