

Asking Accordant

Rethinking Donor Qualification



Our major gift officer has had to expand her responsibilities and we are frankly concerned that burnout is just around the corner. Can you provide any advice on simplifying or delegating some of the donor prospecting so that our officer's days are more efficient and effective?



There is not only a shortage of qualified major gift officers but also a common concern that those who are qualified are just too overwhelmed with more and more responsibilities. How much of your major gift officers' days are spent qualifying donors and prospects? If they are true, 100% gift officers, at least 80% of their time needs to be focused on prospects. Instead of having them involved in initial calls and visits that often lead to dead ends, consider the same talent and skills that build relationships with prospects is not necessarily the same talent and skills that secure the initial meeting.

The pandemic has clearly demonstrated we can be efficient and effective by authentically connecting with prospects and donors over virtual platforms. With that in mind, this is the perfect time to rethink the process and the skill sets utilized to qualify donors. In the past, major gift officers often owned the entire continuum of portfolio management with hundreds of names assigned to them. However, if foundations utilize a different staff person on a virtual platform to conduct qualification visits, it could create better alignment and utilization of executive-level and team resources while also providing more joy in the major gift officers' and qualification officers' roles. Simply, a junior team member supported by Zoom calls, for example, could conduct initial qualification visits with donors and prospects. Prospects who demonstrate interest as potential partners could then be introduced to the major gift officer with the opportunity to learn more at a higher level of engagement. This approach supports a continuum of relationship that is known to work while also leveraging and balancing scarce and overwhelmed resources. Release of these responsibilities frees time for greater impact activities at the executive level. Traditionally, transitioning prospects among team members hasn't felt

donor-centric; however, it's important to remember potential partners benefit from engagement throughout your organization's team, especially when conversations remain focused on the priorities and interests of donors.

Start by compiling a list of donor/prospect questions that includes the exploration of their goals, passions and purpose. End promising conversations with the expectation of next steps that serves their interests, including the introduction to the major gift officer. Follow up and follow through with each conversation. Stay donor focused, connect them to the health care organization's strategic priorities and develop your strategy for success in the qualification AND the cultivation of donors by building two avenues of engagement. The result of sharing the process can not only help alleviate burnout but also bring joy to the process for all involved.

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