

In search of improved fundraising yields, development organizations have started to make significant investments in training their front-line fundraisers. As Matthew Eynon, Vice President at Franklin & Marshall puts it, “following the lead of for-profit companies, non-profit organizations have just in the last couple of years started to understand the significant ROI to investing in making their revenue generators better, smarter, faster.”

All investments in front-line fundraisers, however, are not equal. Most current investment is focused on “point-in-time” training - half-day to full-day sessions with heavy content and limited interactivity - that has practically no proven impact on performance. Raising performance levels requires training be embedded in a comprehensive performance improvement system that includes skill building, sustainable execution, and performance measurement.

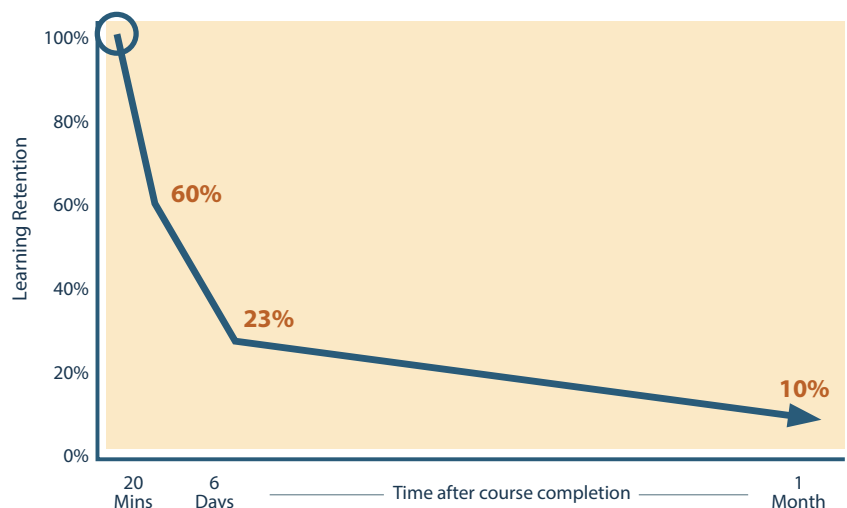
TRAINING FALLS SHORT

The unrealized goal of point-in-time training is to improve gift officer performance, typically measured in dollars raised. The hope is that introducing fundraisers to new concepts, allowing them to hear from colleagues or experts about best practices, or creating forums in which gift officers can collaborate will translate into skills and repeatable behaviors that increase fundraising yields.

The unfortunate reality is that without linking concepts to actionable tasks by leveraging experiential learning and coaching, gift officers are left with little or no way to implement what they’ve heard or seen in a traditional training venue. In fact, research suggests that people forget 40% of what they learn from training in 20 minutes, 77% in six days, and 90% within a month (Figure 1)¹, which means much of the current training investment is neither cost-effective nor productive.

Imagine the players on a soccer team watching games on TV, discussing different formations and strategies, and running lots of drills - but never playing (or being coached during) any actual matches - until the “big game”. Expecting compelling results from such an approach is unrealistic.

Figure 1 – The Ebbinghaus Forgetting Curve



¹ A write-up of the classic work on learning retention by Hermann Ebbinghaus can be found here <http://www.dashe.com/blog/elearning/improve-learner-retention-forgetting/> and here <http://www.festo-didactic.co.uk/gb-en/news/forgetting-curve-its-up-to-you.htm?fbid=Z2luZW4uNTUwLjE3LjE2LjM0Mzc;> Another more recent version of similar research by Bob Mosher at the Research Institute of America suggests 42% is forgotten in 30 minutes, 67% in two days, and 85% in 3 weeks. See www.elearningguild.com/showFile.cfm?id=4302

Point-in-time training fails for a number of reasons: the subject material often deals with general ideas, themes, and cases that are disconnected from the actual performance of the practitioners' work; the training content is the same for everyone, and not tailored to the skill needs and skill gaps of individual learners; there are no opportunities for on-going reinforcement and further deepening of skills, allowing any skill gains to degrade quickly.

PERFORMANCE IMPROVEMENT SOLUTIONS

The key to translating training into performance improvement is linking training investments to a culture of continuous performance improvement. Linda Davidson, Vice Chancellor in the University of Tennessee System, puts it this way, "we worked with one of the major fundraising training firms and it was helpful in creating a common vocabulary and approach for our team. What we did not get was the consistent application of this common approach to our work in ways that help take fundraising to the next level." Linking training to performance improvement (Figure 2) requires the integration of three additional elements: skill building, sustained execution, and performance measurement.

BUILDING SKILLS:

Skill building requires leveraging individual coaching and action learning exercises to ensure that training concepts are immediately translated into practice. Action learning strategies are work-based (e.g. focused on specific prospects in an individual gift officer's portfolio), results-oriented, and focused on problem solving. Successful action learning also requires skill assessments that strengthen individual learning pathways by helping to understand needs and areas of focus for each participant.² Finally, successful action learning should integrate individual and collective learning, so that learners can act as peer mentors and coaches to one another in applying methodology and tools to real life situations.³

Figure 2 – Training vs. Performance Improvement



² <http://www.eucis-III.eu/good-practices/strengthening-individual-learning-pathways-by-developing-skills-assessment-tools-for-workers-solidar/>

³ http://www.2020mds.com/1.2actlearn/1.2.1_actlearn.htm



SUSTAINABLE EXECUTION:

The second key element of translating training into performance improvement is making sure that the training delivery and associated skill building translate directly into fundraising execution. Repetition is the key to success. Successful revenue generators in the commercial sector outperform their peers by leveraging on-going sales development programs that include regular practice of all sales training basics.⁴ The same holds for front-line fundraisers. The most successful fundraisers make practicing their fundraising skills part of their daily habits, even if it is just for 15 minutes a day. Derek Jeter attributes his career 3,413 (9th all time) hits to batting practice, and there's a reason Tiger Woods hits hundreds of golf balls a day. Fundraising skills, like athletics and sales skills, are perishable and need to be maintained.

Sustainable execution also requires that managers participate as player/coaches in training solutions. Managers play a key role in the successful reinforcement and repetition of skills.⁵ In order to play this role, they themselves need to master an efficient and effective fundraising methodology. They also need to be equipped with tools to measure performance and sustain a learning approach that can be leveraged as new employees onboard.

RESULTS MEASUREMENT:

The final element of translating training into performance improvement is measuring the results of investments in training and skill development. High-performing development organizations measure their performance in ways that link fundraising outcomes to the quality of the fundraising process through a set of key performance indicators (KPI). On-going measurement at regular intervals supports the creation of a feedback loop and continuous identification of strengths, gaps, and areas for improvement.

Skill gaps and challenges vary by individual fundraiser and by fundraising organization. It may be that the key challenge is improving qualification to reduce the amount of time cultivating suspects. It could be that a problem lies with not assessing donor impact orientation, thereby undermining maximum giving. At times fundraisers do not have a strong enough sense of the right time to make an ask, leading to lower conversion rates and lingering situations.

Without a robust measurement system it is nearly impossible to do an initial diagnosis of problem areas or to make on-going adjustments.

⁴ <http://www.gaviningham.com/repetition-is-the-mother-of-all-skill-if-you-want-sales-success/>

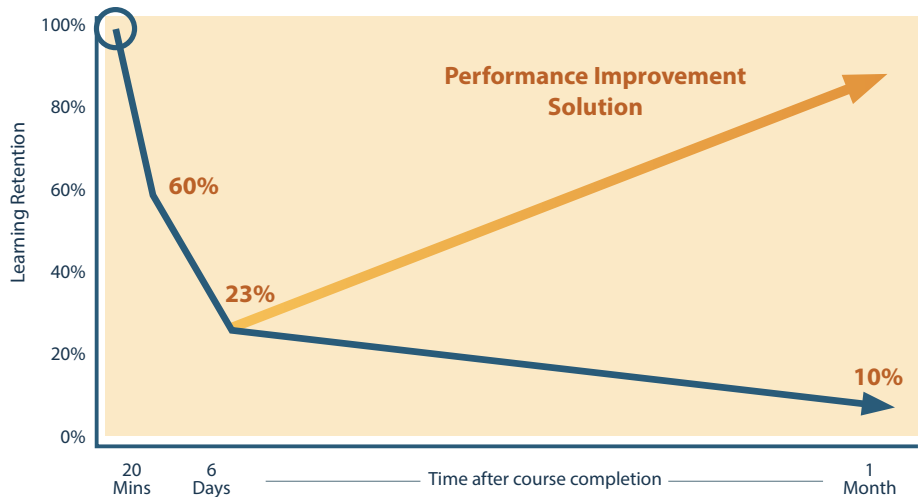
⁵ Grantmakers for Effective Organizations "Learning for Results," *GEO Action Guide*, December 2007; Ralph Hamilton, Prue Brown, Robert Chaskin, et al., *Learning for Community Change: Core Components of Foundations that Learn*, Chicago: Chapin Hall Center for Children at the University of Chicago, October 2005



IMPACT OF PERFORMANCE IMPROVEMENT SOLUTIONS

The benefits of shifting from a focus on training to a focus on performance improvement are substantial. By translating training concepts into sustainable skills embedded into operational execution, and then continually measuring and adjusting training investments based on impact, fundraising organizations can achieve significant and sustainable improvements in performance. A comprehensive performance improvement system can eliminate most learning retention failures by allowing gift officers to bring a new set of skills and an effective approach to their work over a sustained period of time (Figure 3).

Figure 3 – Impact of Performance Improvement Solution



ABOUT PLUS DELTA PARTNERS

Plus Delta is a specialized consulting firm that provides professional development programs for front-line fundraisers and front-line managers. Our unique approach to building sustainable performance improvements blends group training sessions, individual skill assessment and coaching, management skill-building, and on-going performance measurement. Plus Delta Partners has partnered with over 57 Colleges, universities and health care institutions to implement performance improvement solutions that generate significant fundraising gains. In our experience, fundraising teams that commit to moving beyond training to build a culture of on-going performance improvement typically realize a 25%-30% improvement in fundraising outcomes. Specific case studies of the transition to a high-performance fundraising teams can be found under Success Stories at <http://plusdeltapartners.com/>

