I Don't Know What I Don't Know

Improving fundraiser relations through needs assessment

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Academic Background

- MLIS candidate at UNC Greensboro

- More interested in the I than the L

- Prospect research is an information profession!
  - Lots of ways to apply library and information science to prospect research!
  - Not-insignificant number of MLS/MLIS/MIS holders in the profession

Information Behavior

INFORMATION BEHAVIOR…SEEKS TO UNDERSTAND THE WAY PEOPLE SEARCH FOR AND USE INFORMATION… IT CAN INCLUDE INFORMATION SEEKING AND INFORMATION RETRIEVAL, BUT IT ALSO AIMS TO UNDERSTAND *WHY* PEOPLE SEEK INFORMATION AND *HOW* THEY USE IT.

-WIKIPEDIA, CITING FAIRER-WESSELS (1990) AND WILSON (1981)

Genesis of the Project

Why not conduct an independent study on information behaviors at work?

Genesis of the Project

- Poor relationships with development staff
- Poor onboarding of DOs
- Poor DO understanding of prospect research
- Poor reputation
- Lack of faith in research product
- Lack of belief in the power of research

Problems

- Issues inherited from previous staff
- Leadership turnover resulted in challenges
- Silos of back office and front-facing fundraisers
- We don't understand our clients!
  - They don't get what they need
  - They don't see us as useful
  - Bad reputation isn't improving

When Feedback Goes Wrong

They're not giving us feedback! How are we supposed to get better if they won't tell us how?

Nobody's asking us for feedback! When we give it nobody listens! They must not care.

Consequences

- Stagnation
  - Little more than a reactive profile factory
  - Liaison system discussed, but not implemented
  - Rebuilding trust difficult
- Inefficiency
- Ineffectiveness

Needs Assessment

What are the needs?

Are they being met?

What aren't we doing that we could be doing?

What are we doing that isn't meeting anyone's needs?

Background Research

THE CONCEPT OF CUSTOMER SATISFACTION MUST BE FIRMLY IN PLACE BEFORE INTEGRATING QUALITY INTO THE PROSPECT RESEARCH OFFICE.

-JAMES BONKOVSKY, WHITNEY MUSEUM

"Integrating Quality Management into Prospect Research," Fund Raising Management, January 1994

Bonkovsky's System

- Identify the present needs of development staff
- Monitor feedback from staff
- Continuously integrate feedback into research processes

Weighing the Options

Surveys or questionnaires

- Pro:
  - Self-administered
  - Analysis can be as simple as loading into a spreadsheet
  - Can be completed at the leisure of the respondent
- Con:
  - Low response rate
  - In interest of time, can be brief and shallow
    - Multiple choice/Likert scale loses nuance
    - Open-text boxes may not give much information, if they're filled at all
  - Danger of subjective interpretation

Weighing the Options

Interviews

- Pro:
  - Deeper, more nuanced responses
  - Allows for greater breadth and depth of discussion
  - Allows follow-up and clarifying questions
- Con:
  - Much greater time investment
  - Analysis takes much longer
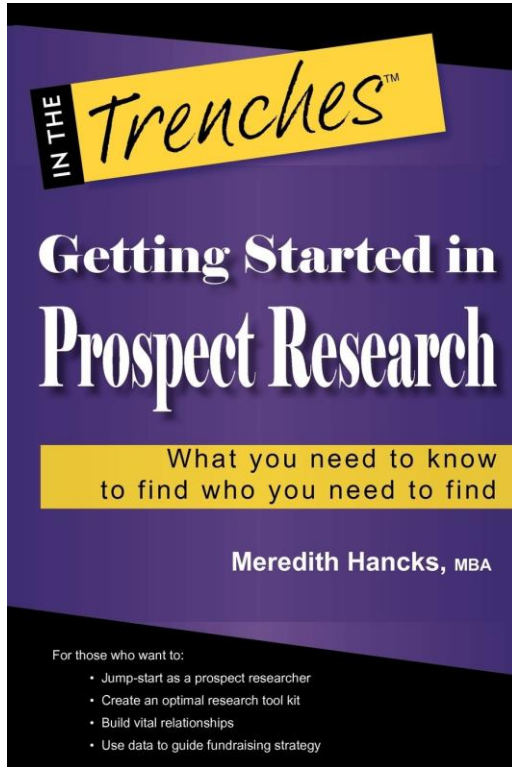 - Demand on interviewer to remain open-minded

Weighing the Options

Focus Groups

- Pro:
  - Allows participants to work off of each other
  - Takes less time than one-on-one interviews
  - Can articulate quantifiable data
- Con:
  - One or two people may control the conversation
  - Brings group dynamics and politics into play
  - Time investment

Help Arrives!

Getting Started in Prospect Research
Meredith Hancks, MBA
Director of Prospect Management and Research
Western Illinois University, Macomb, IL

amazon.com®

Questions from Hancks

- How does the research you have received help you build relationships with your donors?
- Is there something you wish you could get that you are not currently getting from research?
- Are you currently getting information that you don't use, and if so, what is it?
- What are your thoughts on the format of the information you receive?
- Do you feel like you get the information you need when you need it?
- Do you know what information you can ask for from research?
- Are there any services or training opportunities you would like us to investigate for possible future implementation?
- Can you tell me about some success stories where research helped you close a gift with a donor?

The Process

- One-on-one interviews
  - Answers we sought too nuanced for a survey
  - Open-ended questions
  - Fundraisers are storytellers!
  - Great PR!
- Used Hancks's questions unedited
  - Eliminated leading questions and bias
- Confidentiality of responses
- Additional option of anonymous feedback through a Google form

Interviewees

- As wide a scope of individuals as possible
  - Individual school
  - Different types of giving
  - Areas not directly involved in front-facing fundraising
  - Support staff
  - Veterans and newcomers
  - People who weren't using us just as important as those who are!

Interviewees

- 24 people were interviewed
  - 13 front-line fundraisers, from new to veteran
    - 3 principal gift officers
    - 6 regional development directors
    - Parent Programs, Business, Divinity, Athletics
  - 6 administrative support staff
  - Alumni Services, Donor Experience, CFR
  - Vice President and Campaign Director

How'd It Go?

- Universal enthusiasm
- All but two face-to-face
- Interviews scheduled for 30 minutes but sometimes ran long
- Total of 18 hours spent interviewing 24 people
- Interviews were **not** recorded to preserve confidentiality
- Took notes on laptop

23 OUT OF 24 INTERVIEWEES DID NOT HAVE A CLEAR IDEA OF WHAT PROSPECT RESEARCH IS OR WHAT WE DO.

What is the Role of Research?

- Do you guys have anything to do with assigning portfolios?

- What is it that you do?

- Perception that prospect research is only for transformational gifts or the president

- Uncertainty about how to request research
  - After talking to me, 6 (out of 13 interviewed) giving officers immediately put in research requests

Research's Reputation Is Not Good

- Issues with consistency of research product
- Since we can't rely on research, we do our own work
- Why are you here? Why do we need you?
- What can you give me that I can't find myself?
- So frustrating to articulate his question to research, it's easier for him to find the answers himself – even if it's less efficient

Desire for Proactive Research

- 10 of 24 used "proactive" explicitly
- Why do I have to ask for it?
- How can we get this information pushed to us when it becomes available?
- We're in campaign mode – let's generate new prospects to deepen the pool
- Administrative support staff for the highest tiers of development officers - if they're worried, we should all be

Research Is in a Silo
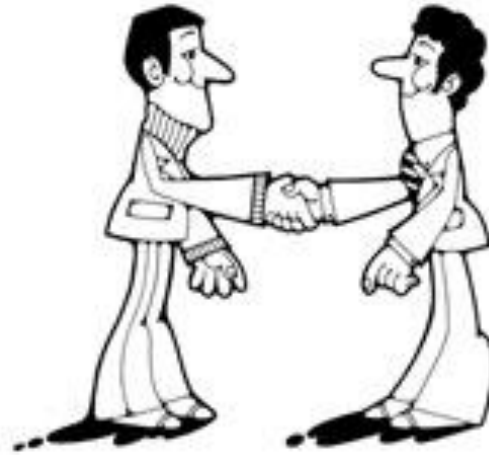
Research Is in a Silo

- Perception was reality
  - Perceived as having no idea
  ...and really didn't
- DOs want us to understand
  - What they want
  - Their portfolios
  - Areas of specialty

What Were We Doing Well?

- Nothing of significance
  - 16 of 24 praised our timeliness
  - As many didn't care about the format as those with an opinion
  - "Most of the time, you don't screw it up"

  But so grateful that I extended the invitation!

Surprises

- Ways we could interact with other departments
  - CFR, to connect foundation and prospect dots
  - Alumni Services, to identify volunteers
  - CER, to share information (they're researchers, too!)
- How to store institutional knowledge
- Communication gaps are everywhere!
- Data integrity

Conclusions

- Implement the liaison system
- Focus on quality control
- Training and education
  - How to more effectively perform your own research
  - What is prospect research (70% wanted this!)
- Reference interviews

Reflections

- Interviews were the right way to go
- Using the same questions for everyone was challenging
- Research in your own workplace is hard!
- The process of needs assessment is just as important as the problems that are identified
- Now that you have their attention, make the most of it!

Think Like a Fundraiser

Develop relationships with your fundraisers the same way that they develop relationships with donors.

- Cultivate
- Build
- Steward

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