

A Marts & Lundy **Special Report**

# Impact of COVID-19 on Development Staff Metrics: A Cross-Sector Overview

May 2020

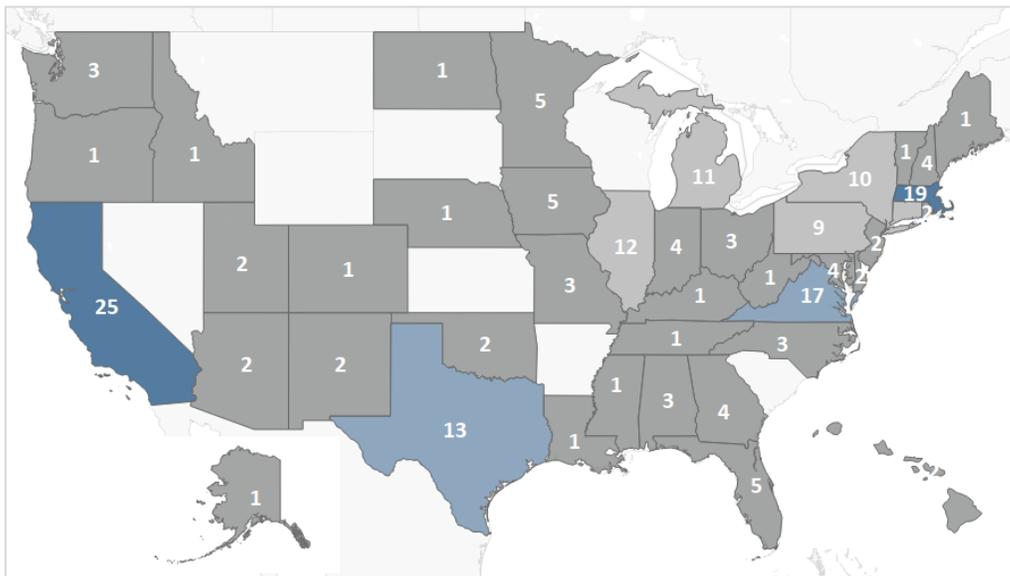
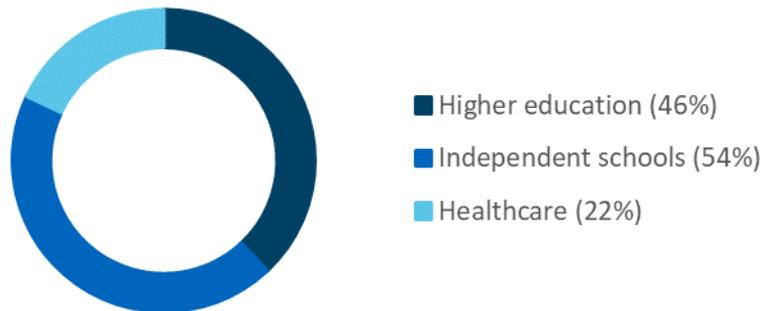


# How has COVID-19 impacted Development staff metrics?

As all sectors face sudden operational and financial challenges due to the pandemic, Development teams are adapting to new ways of engaging constituents. Marts & Lundy developed brief surveys to learn about how COVID-19 has impacted gift officer metrics in higher education, independent schools, and healthcare. The surveys asked participants to categorize how they are adjusting FY20 and FY21 Development staff metrics, based on institutional plans as of May 2020. Where surveys had overlapping questions, we have analyzed the variances in responses.

## Respondents by Sector and Location

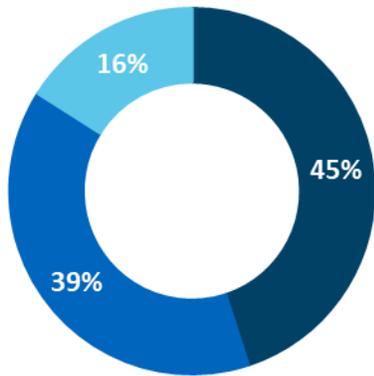
A total of 200 institutions participated in the surveys. Forty-two states and Washington, D.C. are represented in the full cohort.



## Summary of Findings

### Adjustments to FY20 Gift Officer Metrics

---



■ Yes ■ No ■ Undecided

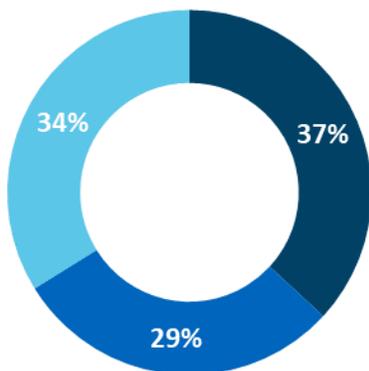
Nearly 40% of all three participating sectors have chosen to stay with their existing FY20 metrics.

While nearly half of higher education institutions and independent schools have decided to adjust FY20 gift officer metrics, healthcare organizations have been less certain.

45% of institutions have chosen to make changes to FY20 staff metrics, and adjusted metrics have focused on activity and dollars. Higher education and independent schools have been most likely to make changes on an individual basis—by gift officer.

### Adjustments to FY21 Gift Officer Metrics

---



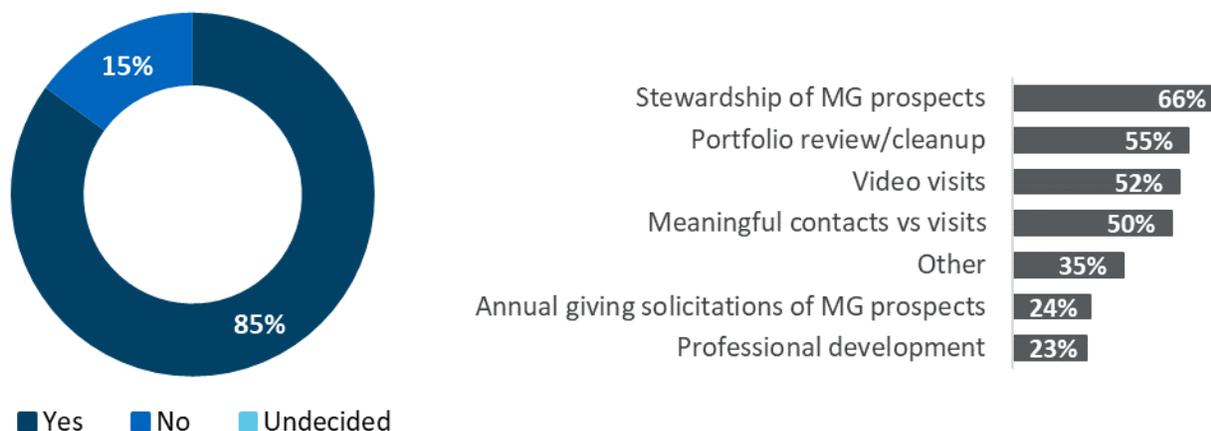
■ Yes ■ No ■ Undecided

There is greater uncertainty over how to handle FY21 gift officer metrics.

While nearly half of higher education institutions have already decided to adjust FY21 metrics, half of independent schools and healthcare organizations remain undecided.

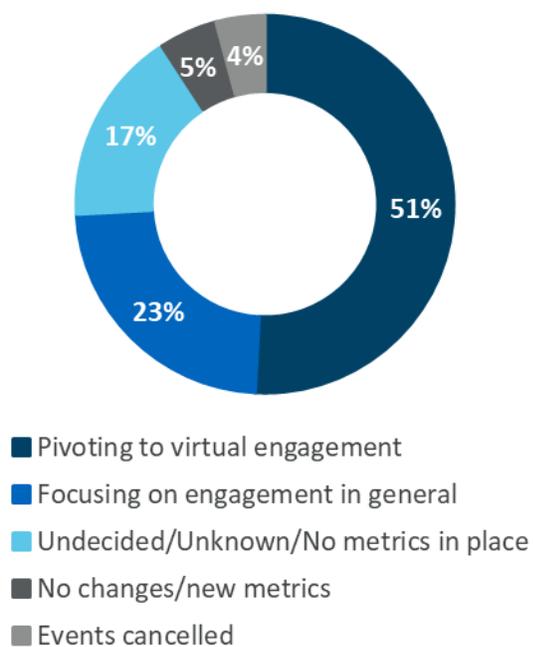
For most of the 37% of institutions that have decided to make changes to FY21 staff metrics, the expectation for dollars raised has decreased.

## New Gift Officer Metrics as a Result of COVID-19



Most institutions have developed new gift officer metrics as a result of the pandemic. These changes have focused on stewardship of major gift prospects and portfolio reviews and cleanup, seeing this time as an opportunity to enhance relationships and refine donor strategies. Many are also revising standards for how donor contact should be measured in this shifting environment.

## Alumni Relations and Donor Event Metrics



Institutions are changing the focus and implementation of activity while trying to maintain or heighten constituent engagement.

More than half have pivoted to virtual engagement due to the pandemic, acknowledging that in-person events may not be feasible for an extended time. How this outreach is conducted varies across the cohort and several noted that what they are currently doing is purely trial and error.

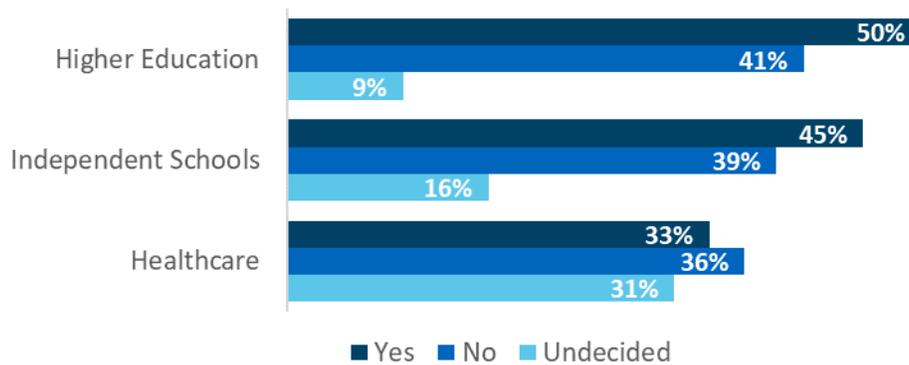
Some institutions noted greater participation in this new environment and have shifted engagement metrics to accommodate the change.

Other institutions are taking a broad look at their engagement strategies and are in regular contact with major donors through a variety of platforms.

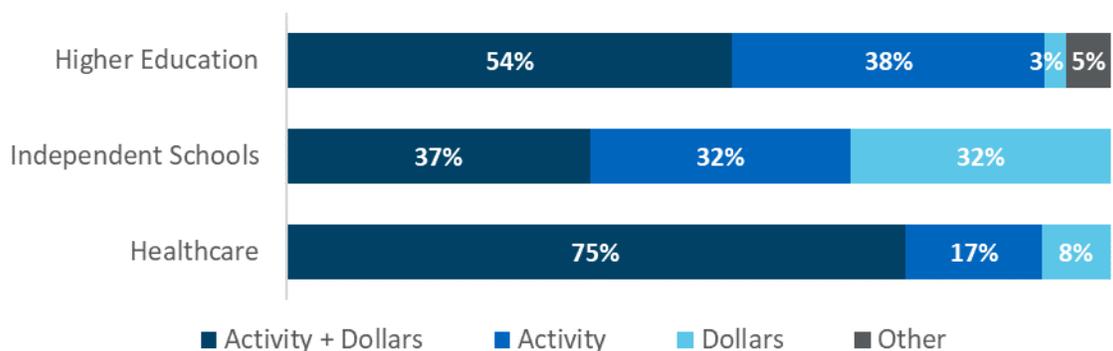
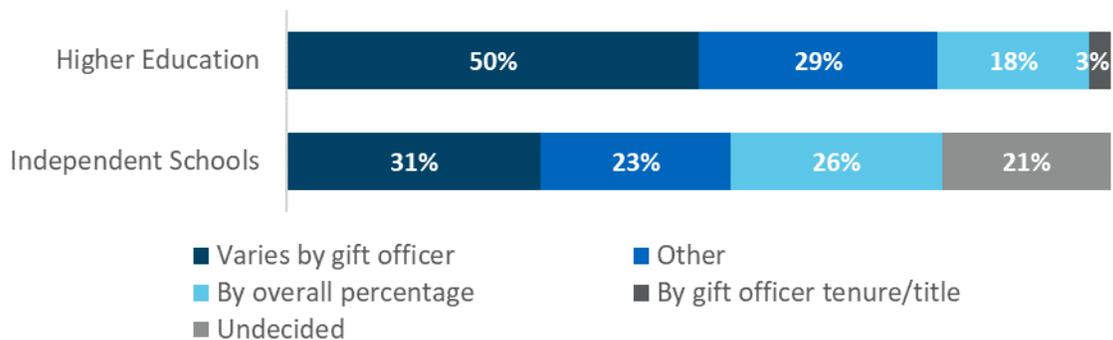
## Findings and Analysis

### Adjustments to FY20 Gift Officer Metrics

While nearly half of higher education institutions and independent schools have decided to adjust FY20 gift officer metrics, healthcare organizations have been less certain. Nearly 40% of all three sectors have chosen to stay with their existing metrics.

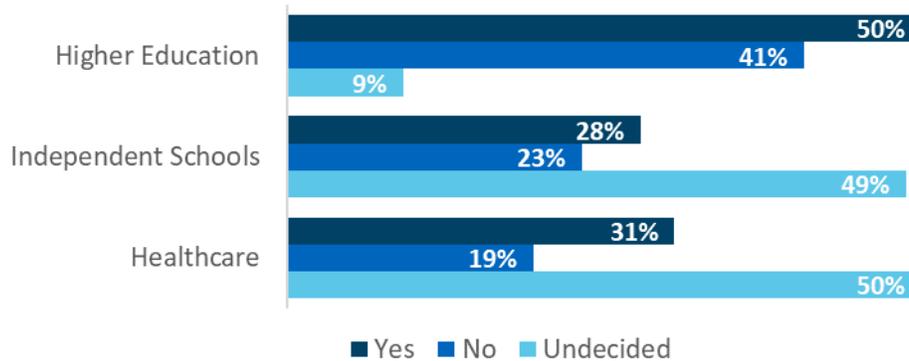


Overall, 45% of institutions (90) have chosen to make changes to FY20 staff metrics. Higher education and independent schools have been more likely to make changes by gift officer, rather than by other means. Across all sectors, adjusted metrics have focused on activity and dollars.

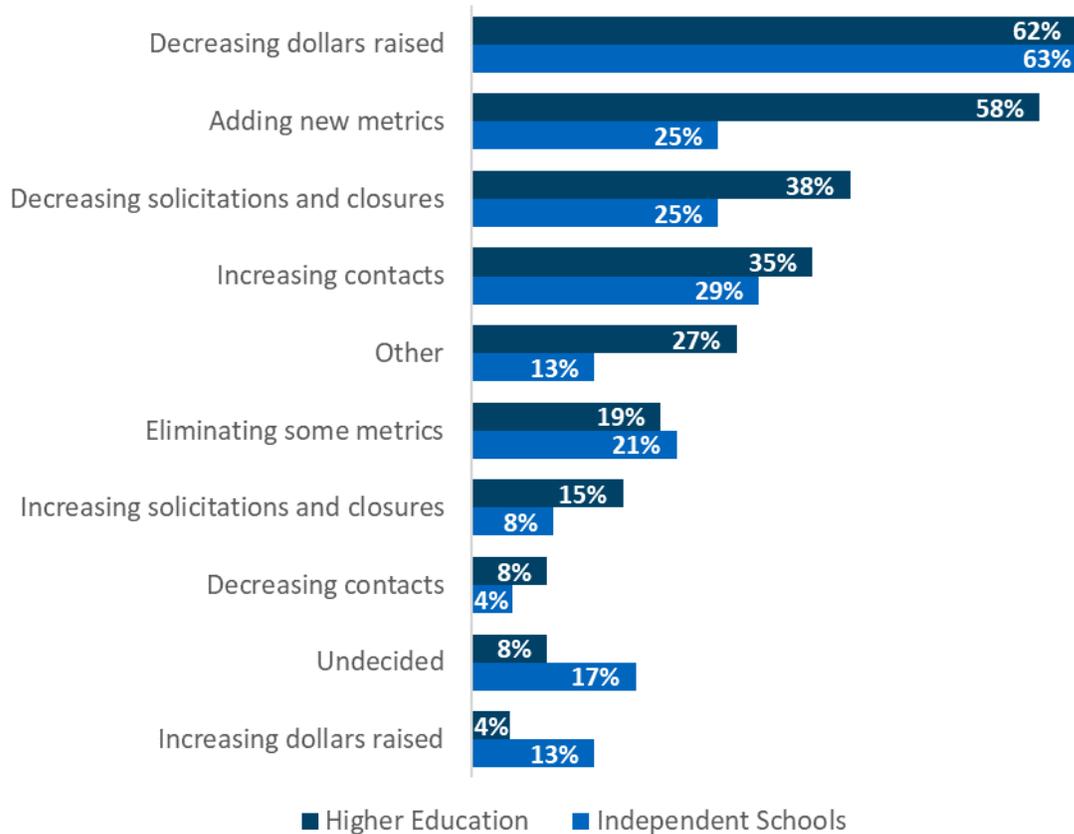


### Adjustments to FY21 Gift Officer Metrics

While nearly half of higher education institutions have already decided to adjust FY21 gift officer metrics, half of independent schools and healthcare organization remain undecided.

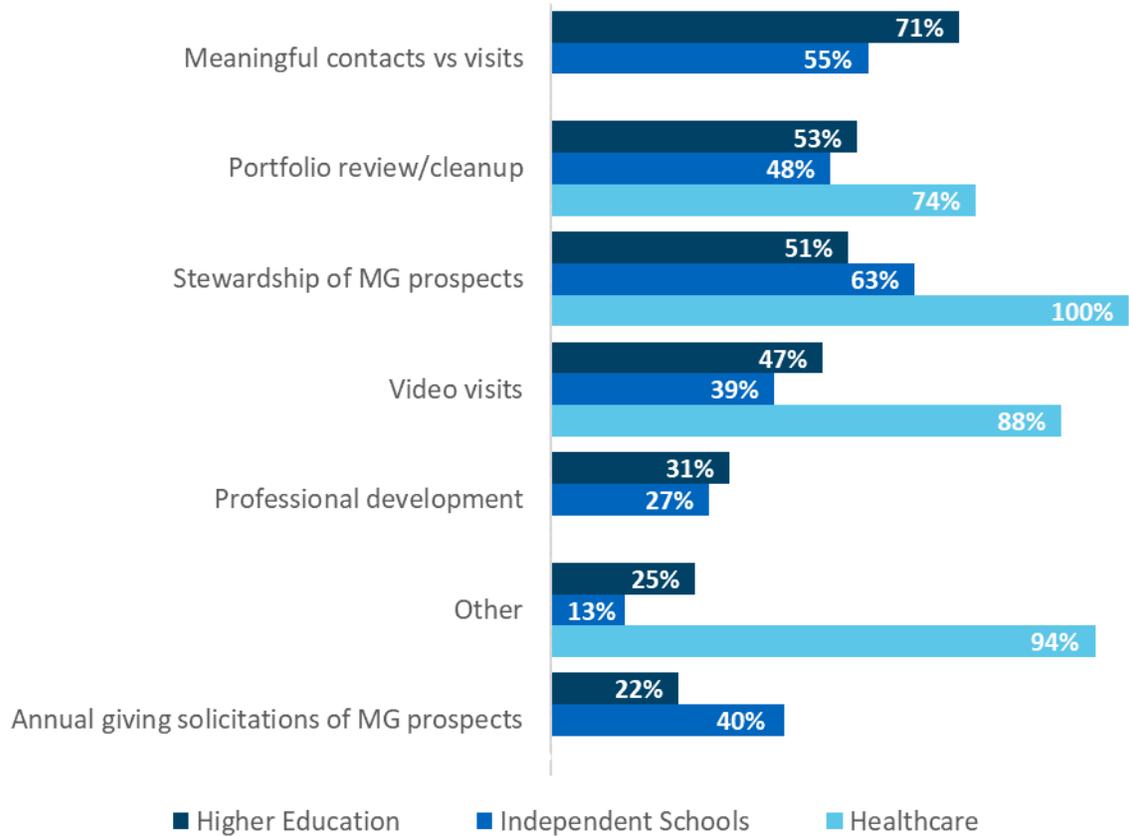


Overall, 37% of institutions (73) have decided to make changes to FY21 staff metrics. In most instances, the expectation for dollars raised has decreased.



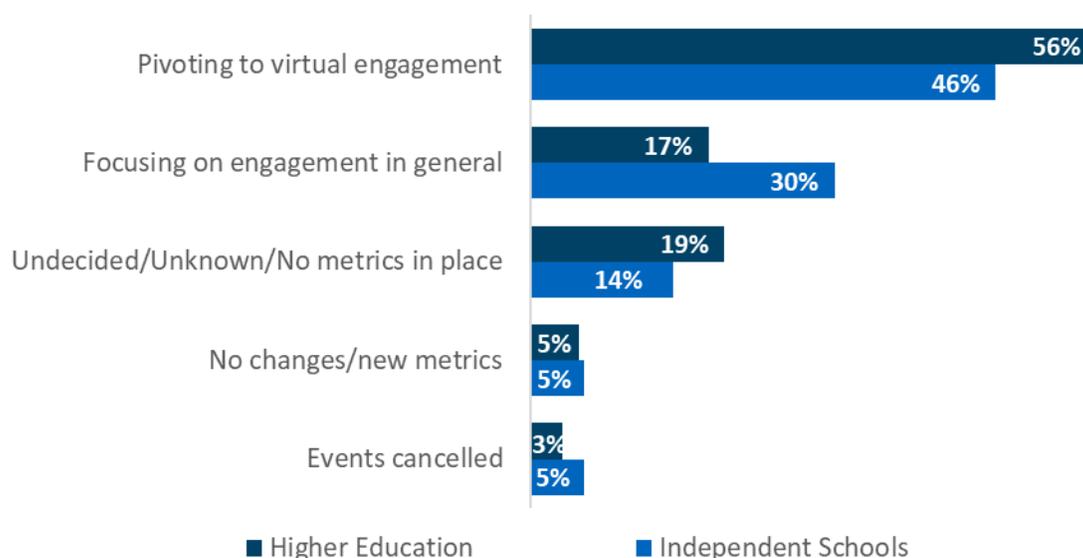
### New Gift Officer Metrics as a Result of COVID-19

Most institutions (85%) have developed new gift officer metrics as a result of the pandemic. These changes have focused on stewardship of major gift prospects and portfolio reviews and cleanup, seeing this time as an opportunity to enhance relationships and refine donor strategies. Many are also revising standards for how donor contact should be measured in this shifting environment.



## Alumni Relations and Donor Event Metrics

Institutions are changing the focus and implementation of activity while trying to maintain or heighten constituent engagement. Many are pivoting to virtual engagement (51%) due to the pandemic, acknowledging that in-person events may not be feasible for an extended time. Some institutions noted greater participation in this new environment and have shifted engagement metrics to accommodate the change (e.g., number of viewers/participants, duration of participation, open rates of video messages). Other institutions are taking a broad look at their engagement strategies (23%) and are in regular contact with major donors through a variety of platforms.



While most institutions (51%) are pivoting to virtual events, how those are conducted varies across the cohort and several noted that what they are doing is purely trial and error. Examples provided include:

- virtual town halls
- weekly Facebook live events where a topic is discussed
- alumni speakers presenting virtually
- showcasing alumni expertise in weekly videos
- Deans and faculty holding webinars
- stewardship video messages in exchange for stewardship events
- virtual informational or social gatherings that include leadership and select donors
- online auctions

## A Marts & Lundy [Special Report](#)

- virtual galas
- virtual reunions
- informal alumni gatherings
- virtual happy hours, some by alumni decade or affinity groups
- digital engagement on a variety of platforms

Many assume that in-person events will not take place through the remainder of 2020, and possibly into 2021, so even those who have not yet made the switch to virtual events noted that it is under careful consideration.