

Research to Explore the Development Director Role in Nonprofits: *Survey for Development Respondents*

Instructions for taking the survey:

This survey is for BOTH:

- **Executive directors/CEOs of organizations that have a senior level position with the primary role of fund development on staff.** Please note, do not take this survey if you are not currently an ED/CEO.
- **Senior level (highest ranking position) fund development staff.** Please note, do not take this survey if you are not the highest ranking fund development person in your nonprofit.

Please be candid in your responses; this survey is confidential and anonymous. Responses will be reported in the aggregate. Thank you for your contribution to this research.

***** Important Notes on Terminology*****

Executive Director/CEO: The titles executive director and CEO are both used throughout the nonprofit sector. For the purposes of this survey, we use executive director or ED to mean both.

Fund Development Staff: In the nonprofit sector, there are various titles used for the highest ranking fund development staff position. For the purposes of this survey we use the terms development position and development role to mean the staff person in the highest ranking development position within the organization. This survey is not for development staff in entry level positions such as coordinator and assistants

Fund Development is the process of cultivating relationships with people who will support a nonprofit organization. Cultivation is defined as any activity that builds awareness and connection for donors/funders and prospective donors/funders with your organization, and increases your understanding of why someone might give to your organization. Fund development includes fundraising which is the specific methods used to secure charitable donations (e.g. annual fund, face-to-face asks, online, proposals, etc.).

1) What is your position in the nonprofit organization where you are currently employed?

() I am the executive director or CEO

DESIGN NOTE: If this response is selected, respondent is directed to the Executive Director Respondents survey.

() I am the senior level/highest ranking fund development staff person

DESIGN NOTE: If this response is selected, respondent is directed to the Fund Development Respondents survey (see the questions below).

() Neither of the above

DESIGN NOTE: If this response is selected, respondent is directed to the following message:

This survey is meant for:

1. Executive directors/CEOs who have a senior-level fund development staff person

AND

2. Senior-level fund development staff

You replied that you are currently not in either of these roles. If you entered this in error, please return to the survey and continue. If your current position does not fit the survey criteria, please forward to the staff members in your organizations who do.

Thank you for your interest in this research.

2) What is your title?

Fund Development Respondents

Please tell us about your current fund development position.

1) How many years have you been:

Round to the nearest year. Enter whole numbers only. Please do not include any letters, symbols, or punctuation.

Employed in your current organization (including all positions you have held)? _____

In your current fund development position? _____

2) If your current position was a move from a prior position in your organization (whether lateral or a promotion), what part of the organization was your prior position in?

Select the option that best fits.

Fund development/fundraising

Program

Communications and/or marketing

Finance

Advocacy

Administration/HR/IT

N/A I was not in a different position prior to my current position at my organization.

Other: _____ *

3) Throughout your entire career and including your current position, how many total years have you worked in the field of fund development (in a position where fund development was your primary role)?

Years: *(Round to the nearest year. Enter whole numbers only. Please do not include any letters, symbols, or punctuation.):* _____

4) In your hiring process (phone and in person), who was personally involved in your screening and selection?

Select all that apply.

Executive director

The board chair

Other board members

Other senior level staff

Other staff within various levels and positions in the organization

Volunteers (non-board)

Clients/Constituents

5) Which of the following describes how your predecessor left her/his fund development position?

- Voluntarily
- Forced resignation/fired
- I don't know
- N/A, I have no predecessor

6) Before you began in your current fund development position was the position vacant for 6 or more months?

- Yes
- No
- I don't know

7) Who do you directly report to?

- The executive director or CEO.
- Another staff person who is in a fund development position.
- Another staff person not in fund development but in administration/finance/HR.
- The board of directors.
- Other: _____*

8) Are you a member of the senior (or executive) level management team?

- Yes
- No
- We do not have a management team.

9) How many paid staff positions (part time and full time) do you directly supervise?

Enter total FTE paid staff (e.g. one full time and one half time FTE = 1.5). Please do not include any letters or symbols.

10) Which of the following fund development areas* are your primary responsibility?

Select all that apply.

*Fundraising competencies as defined by CFRE.

Current and prospective donor research (develop a prospect list, prospect analysis, utilize data management system, prioritize and plan solicitations)

Securing the gift (development of the case, creation of solicitation program(s), asking for and securing gifts, development of solicitation materials, evaluation of solicitation program)

Relationship building (donor cultivation, acknowledgement and recognition, communications and information to donors)

Volunteer involvement (recruitment, oversight, support, evaluation, and engagement of volunteers; engagement and support of board members)

Management (involvement in setting organizational strategy and budgets, implementation of fund development plans, recruit, train support, and supervise (when appropriate) staff, and implementation of development policies)

Accountability (reporting, ensuring and monitoring donor intent, compliance)

N/A I do not have primary responsibility for any of the fund development components listed above.

11) How would you assess your current level of competence (capability, skill, and knowledge) within each of the following same areas?

	None at all	Novice	Knowledgeable	Expert
Current and prospective donor research	()	()	()	()
Securing the gift	()	()	()	()
Relationship building	()	()	()	()
Volunteer involvement	()	()	()	()
Management	()	()	()	()
Accountability	()	()	()	()

12) To what extent have you utilized the following professional development sources/activities in your development roles (both past and current)?

	Never used	Use very little	Use a moderate amount	Use frequently
Enrollment in an academic program focused on philanthropy and development.	()	()	()	()

Participate in continuing education opportunities in philanthropy and development offered by professional associations. <i>(For example: workshops/conferences offered by AFP, AHP, CASE, etc. or other qualified institutions.)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with an executive coach or mentor to develop fundraising skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participate in a peer learning group focused on philanthropy and development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Read sector publications. <i>(e.g. The Chronicle of Philanthropy, Nonprofit Quarterly, Stanford Social Innovation Review)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Read books on fund development by leading authors in the field.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13) Which of the following best describes how you feel about your work in fund development?

Select one.

- It is just a job - a stepping stone on a path to something else.
- It is my current field of work, but I am not sure if I will stay in fund development for my entire career.
- I plan to stay in fund development for my entire career; I am passionate about it.
- None of the above describes me well.

14) Which of the following statements best describes your level of satisfaction in your current fund development position?

Select one.

- Very satisfied
- Satisfied
- Neither satisfied or dissatisfied
- Dissatisfied
- Very dissatisfied

15) To what extent do you have influence over the following in your fund development role?

	I have no influence at all	I have some influence	I have a lot of influence	I don't know
Setting organizational strategies for your organization.	()	()	()	()
Creating fund development plans for your organization.	()	()	()	()
Setting financial goals for your organization.	()	()	()	()
Developing the organization's annual budget.	()	()	()	()
The executive director's participation in fundraising.	()	()	()	()
Individual board member's participation in fundraising.	()	()	()	()
Other staff members' participation	()	()	()	()

in fundraising.				
Establishing the fund development department (systems, staffing etc.) in your organization.	()	()	()	()
Establishing fund development expectations of the board (as a whole).	()	()	()	()

16) Which of the following statements best describes how you feel about your relationship with the executive director of your organization?

Select one.

- () Difficult; strained working relationship (may include: low trust, conflict, tension, poor communication, unsupportive)
- () Functional; fair working relationship (may include: adequate trust, good communication)
- () Exceptional; excellent working relationship (may include: deep trust, excellent communication)

17) Which of the following statements best describes how you and the executive director partner in fund development work within the organization?

Select one.

- () There is no partnership; we do not partner at all.
- () It is a weak partnership; we do not partner effectively.
- () It is a fair partnership; we partner effectively.
- () It is a strong partnership; we partner very effectively.

18) Which of the following statements best describes how you feel about your overall relationship with your organization's board of directors?

Select one.

- () Difficult; strained working relationship (may include: low trust, conflict, tension, poor communication, unsupportive)

- Functional; fair working relationship (may include: adequate trust, good communication)
- Exceptional; excellent working relationship (may include: deep trust, excellent communication)
- N/A I do not have a relationship with the board of directors.

19) To what extent are you and the board of directors (as a whole) generally in agreement about your fund development duties and responsibilities?

- Strongly disagree about my duties and responsibilities.
- Disagree about my duties and responsibilities.
- Agree on my duties and responsibilities.
- Strongly agree on my duties and responsibilities.
- N/A I do not communicate with the board of directors.

20) Is one of your primary responsibilities solicitation/asking individual donors for contributions?

- Yes
- No

21) To what extent do you enjoy solicitation/asking individual donors for contributions?

- I strongly dislike asking for contributions.
- I dislike asking for contributions.
- I like asking for contributions.
- I love asking for contributions.
- I don't know, I have never made an ask.

22) To what extent do you agree with the following statements?

	Strongly disagree	Disagree	Agree	Strongly agree
My position is a good match for me in terms of my abilities.	()	()	()	()
My organization is a good match	()	()	()	()

for me in terms of its organizational culture (individuals' collective behavior, values, beliefs, norms, working language, systems).				
There is an adequate fund development infrastructure (facilities, technology, systems, etc.) in place for me to be successful.	()	()	()	()
My organization provides me access to opportunities for professional growth.	()	()	()	()
There are realistic performance goals set for me in my position.	()	()	()	()
I am included in organization-wide decisions including strategy and goal setting.	()	()	()	()

I am passionate about my organization's mission and field of work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am generally satisfied with my compensation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

23) Knowing that the future may be hard to predict, how much longer do you imagine that you'll stay in your current fund development position?

- Less than 1 year
- 1 - 2 years
- 3 - 4 years
- 5 or more years

24) Knowing that the future may be hard to predict, how much longer do you imagine that you'll stay in the field of fund development?

- Less than 1 year
- 1 - 2 years
- 3 - 4 years
- 5 or more years

25) Have you given notice to your executive director that you are leaving your current position?

- Yes, I have given notice.
- No, I have not given notice.
- No, but I am actively considering leaving.

DESIGN NOTE: Questions 25a and 25b are hidden unless respondent selects 'Yes, I have given notice' from the question above.

25a) If you have given notice or are actively considering leaving, which of the following reasons is a significant factor in your decision to leave?

Rank the top 3 choices given.

_____ To find another position that will provide me with opportunities for professional growth.

_____ To find a position that is a better match for me in terms of my fund development skills and knowledge.

_____ To work in another organization that is a better match for me in terms of its organizational culture.

_____ To work in another organization that is a better match for me in terms of mission and/or field of work.

_____ Inadequate fund development infrastructure (facilities, technology, systems, etc.) to be successful in my organization.

_____ My organization has disrespect/does not value my fund development expertise and experience.

_____ Frustration that I am not included in organization-wide strategy, goal setting, and decision making.

_____ To get out of fund development; desire for a different kind of work/field.

_____ Lack of agreement between me and my executive director about my performance expectations.

_____ Lack of agreement between me and the board of directors about my responsibilities.

_____ Desire for more flexibility and control over my schedule.

_____ Interpersonal conflict with my current executive director.

_____ Interpersonal conflict with other(s) on staff.

_____ Interpersonal conflict with members of the board of directors.

_____ Overall burnout (e.g. feeling depleted, frustrated, frequent and prolonged exhaustion).

_____ I am retiring.

_____ Compensation/to make more money elsewhere.

25b) If there is another significant factor in your decision to leave, please enter it here:

Please tell us about your nonprofit organization.

26) Is there currently a fund development or fundraising committee of the board of directors?

- Yes, a committee is in place.
- No, we do not have a committee.
- We are in the process of establishing a committee.

27) What fundraising methods does your organization use?

Select all that apply.

- Direct response (mail)
- Online
- Special events
- Telephone
- Major gifts
- Foundation proposals
- Contributions from federated campaigns
- Contributions from congregations
- Board giving
- Planned/legacy giving (bequests)
- N/A we do not solicit contributions

28) In your last fiscal year, what approximate percentage of your organization's total annual operating revenue comes from the following sources?

Enter whole numbers only. Please do not include any letters, symbols, or punctuation. Sum should equal 100.

Approximate percentages to the best of your ability. If you do not know, please skip this question.

- _____ Earned income (fees, sales, service/program contracts, investment interest etc.)
- _____ Membership specific earned income
- _____ Corporate donations or sponsorships
- _____ Government contracts
- _____ Foundation grants
- _____ Contributions from individuals
- _____ In-kind donations

29) In your last fiscal year, what was the approximate total dollar amount raised in contributions from individuals?

() \$: *(Enter whole numbers only. Please do not include any letters, symbols, or punctuation.)*

_____*

() I don't know.

() N/A, we do not receive contributions from individuals.

30) In your last fiscal year, what was the approximate total number of individuals who contributed?

() I don't know

() N/A, we do not receive contributions from individuals

() Total number of individuals who gave: *(Enter whole numbers only. Please do not include any letters, symbols, or punctuation.)* _____*

31) What is your current donor retention rate (defined as the percentage of donors who repeated their contributions to your organization from one year to the next)?

() % _____*

() I don't know.

32) To what extent are your organization's fundraising activities (all combined) effective at meeting your fundraising goals?

Select one.

() Not at all effective

() Somewhat effective

() Effective

() Very effective

33) Do you agree with the following statements?

	Yes	No
My organization has realistic revenue goals for this fiscal year.	()	()
My organization has a fund development plan in place.	()	()
My organization uses a donor database in a software program specifically designed for fundraising (e.g. not Microsoft Excel).	()	()

34) To what extent do you agree with the following statements about your organization generally/as a whole?

	Strongly disagree	Disagree	Agree	Strongly agree
<p>We have a culture of philanthropy in my organization.</p> <p><i>Most people in the organization (across positions) act as ambassadors and engage in relationship building; everyone promotes philanthropy and can articulate a case for giving; fund development is viewed and valued as a mission aligned program of the organization; organizational systems are established to support donors; the executive director is committed and personally involved in fundraising.</i></p>	()	()	()	()
<p>My organization practices good donor stewardship.</p> <p><i>Prompt and personalized acknowledgment of gifts, ongoing communication with donors, information about results of gifts given, adherence to ethical standards and practices.</i></p>	()	()	()	()
<p>My organization understands that fund development has a documented body of knowledge, code of ethics, certification, research, and continuing education.</p>	()	()	()	()
<p>My organization values me for my fund development skills, knowledge and expertise.</p>	()	()	()	()

My organization has sufficient capacity to carry out its fund development work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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35) Complete this sentence using a few words or a short sentence:

I think we would raise more money if: _____

36) What is the primary activity of the nonprofit organization at which you are employed?

Select the option that is closest.

- Arts, Culture, and Humanities
- Educational Institutions
- Environmental Quality Protection, Beautification
- Animal related
- Health—General & Rehabilitative
- Mental Health, Crisis Intervention
- Disease, Disorders, Medical Disciplines
- Medical Research
- Crime, Legal Related
- Employment, Job Related
- Agriculture, Food, Nutrition
- Housing, Shelter
- Public Safety, Disaster Preparedness and Relief
- Recreation, Sports, Leisure, Athletics
- Youth Development
- Human Services
- International, Foreign Affairs, and National Security
- Civil Rights, Social Action, Advocacy
- Community Improvement, Capacity Building
- Philanthropy, Voluntarism, and Grantmaking
- Science and Technology Research Institutes
- Social Science Research Institutes
- Public, Society Benefit

- () Religion, Spiritual Development
- () Mutual/Membership Benefit Organizations
- () Other (please specify): _____ *

37) Are 51% or more of your organization's programs targeted to or on specific behalf of one of these populations?

Select all that apply.

- [] People of Color
- [] Lesbian, Gay, Bisexual, Transgender (LGBT)
- [] Immigrants

38) In what year was your organization founded?

Please do not include any letters, symbols, or punctuation.

39) Which of the following organizational life-cycle stages most closely describes your current organization at this time?

Select one.

- () Start-Up/New - Simple programs are initiated or a mix of diverse and non-integrated activities.
- () Adolescent- Programs begin to establish themselves in the market. Often demand is greater than capacity.
- () Growing Mature/Sustainable - Core programs are established and recognized in the community. Programs functioning well.
- () Stagnation/Burn out - No longer meeting market needs. Decline in product quality.
- () Renewal - Long range program planning. New programs are added & deleted as market dictates.
- () Decline/Shut-Down - Loss of credibility with funders and clients. Major reduction in referrals.

40) What is the annual operating budget of your organization this fiscal year?

- () I don't know.
- () \$: (Round to the nearest 1000. Enter whole numbers only. Please do not include any letters, symbols, or punctuation.) _____

41) How many paid staff does your organization employ?

Enter total FTE paid staff (e.g. one full time and one half time FTE = 1.5). Please do not include any letters or symbols.

42) Including your position, how many paid staff work primarily in fund development?

Enter total FTE paid staff (e.g. one full time and one half time FTE = 1.5). Please do not include any letters or symbols.

43) In what zip code is your headquarters office located?

Please tell us about you.

44) What is your age?

Please do not enter any letters, symbols, or punctuation.

45) What is your gender?

- Male
- Female
- Transgender
- Inter-sex
- Decline to state

46) What is your race/ethnicity?

Please select one.

- African American
- Asian/Pacific Islander
- Latino/a

- Middle Eastern
- Native American
- White/Anglo
- Multi-Racial
- Other (please specify): _____

47) In your entire career, have you ever been an executive director/CEO?

- Yes
- No

48) How important have the following been to your success in fund development?

	Not at all Important	Somewhat Important	Important	Very Important	N/A Don't have
Certifications: CFRE, ACFRE or FAHP	()	()	()	()	()
Membership in Professional Association related to Fund Development (e.g. AFP, AHP, ALDE, CASE, NCRD)	()	()	()	()	()
Graduate level degree in Philanthropy, Fund Development, or Fundraising.	()	()	()	()	()
Graduate level degree in Nonprofit Management or Administration.	()	()	()	()	()

49) What is your annual salary (not including benefits)?

Round to the nearest 1000. Enter whole numbers only. Please do not include any letters, symbols, or punctuation.

Thank You!

If you have either an interesting success story or lessons learned story in the area of fund development and/or development staffing that you would like to share with CompassPoint for the purposes of this research, please contact Erin Lingren at erin@compasspoint.org or call 415-541-9000 ext 329.

Thank you for your contribution to this research!
