

What is the quality in your quantity?: Library development assessment should look beyond mere numbers

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Abstract:

Purpose:

To outline the potential hazards of a purely numerical approach to evaluating development professionals and development programs.

Design/methodology/approach:

Narrative paper outlining various means used to assess a library development program.

Findings:

Library development assessment that utilizes quantitative analysis alone without substantive analysis of the underlying numbers will likely yield incorrect conclusions.

Originality/value:

Practical suggestions for utilizing qualitative techniques when assessing a library development program or development professional.

Keywords: Libraries | Function evaluation

Article:

Within development, statistical measurement is almost artistic. From the cost per piece for a solicitation letter to the number of days to close a gift, development operations assess all manners of productivity. Evaluation of productivity can become a task or responsibility in and of itself.

But, is this assessment itself productive? Not necessarily.

Take for example the following scenario: Debby Development Officer is evaluated using the following matrix: number of personal visits to donors and suspects, number of proposals

delivered, dollar amount of proposals delivered, dollar amount of proposals closed, actual monies raised. Each of the above criteria accounts for 20 percent of her overall performance assessment.

Debby conducted 150 visits this year, delivered 30 proposals for a total of \$10 million, closed \$2 million in proposals, and raised \$3.6 million this year. Her goals were to have 12 visits per month (she did!), deliver 25 proposals for a total of \$10 million (yes to both!), close \$2 million (yes, again!) and raise \$3 million (bingo!).

Consequently, Debby achieved her goals, right? Not necessarily.

Of her 150 visits, Debby counted everything – trips to the mall where she incidentally ran into a donor, a casual conversation at a reception, visits with her friend – Gertrude Giver – who makes a small annual gift to the library (Debby saw her five times!), and on and on.

Of the 30 proposals, each was for a minimum of \$100,000. None of the (potential) donors was previously rated at even the \$10,000 level. Debby just decided to ask everyone for the same amount this year because she was receiving pressure from the library director and the development vice president to find new major gift prospects, so she decided to see what might stick.

Of the closed proposals, all previously had been delivered by Brenda Before and the donors simply chose to send in the paperwork now; but in this evaluation system, Debby received credit because the proposals closed on her watch.

Of the \$3.6 million raised, did Debby forget to mention that a key volunteer died and left the library \$1.4 million which had previously not been documented?

While the above scenarios may sound outlandish, they are all plausible, possible, and potentially hazardous to your library. The above criteria were not pulled from “thin air” either – these were among the most frequently used evaluation measures for development officers according to the Association of Research Libraries' *SPEC Kit 297: Library Development* (Jennings and Wanschers, 2006).

This is not to say that a purely qualitative methodology for evaluation would be a positive step either. An equally likely, possible, and potentially hazardous qualitative method could be outlined as well.

High lighting the “quality” in your “quantity” may sound humorous; but it is realistic and necessary.

The following suggestions can be used to augment assessment:

1. *Donor visits:*

- Evaluate donor visits in terms of the donor solicitation stage: identification, cultivation, solicitation and stewardship. If all the visits are overwhelmingly stewardship, your donor pipeline may shut off.

- Possibly review substantive contacts as well. You can conduct library business over the phone, through e-mail and through letter – and successfully close gifts that way.
- Ask your donors to participate in evaluating the development officer or the development operation – they are your biggest users – do not leave them out of the equation.
- Possibly lower the visit expectation due to the nature of your library and/or your prospect base.

2. *Proposals:*

- Be realistic about what is in the pipeline. It is rare that a \$100,000 cash gift is going to come from a recent \$500 donor.
- Determining a proper ask amount is an art and a skill – it should not be like throwing darts blindfolded.
- Common development thought is a 3:1 ratio. Deliver three proposals to receive one. A 0.333 batting average is great. Higher than that, you may not be delivering proposals quickly enough. Lower than that, take your blindfold off and actually look at the target!!
- Do not ignore previous proposals that have not closed. Review what is outstanding – remove it from your system or follow up!

3. *Dollars raised:*

- Look critically at your goals for a given year – do you have the donor base to support raising \$2 million – or is \$200,000 much more realistic?
- Analyze “surprise” gifts to determine what other potential donors may be lurking.
- Have any new gifts from new people come in? This shows a healthy donor pipeline as it is being infused with new donors or suspects.

4. *Other criteria:*

- Ethics – goes without saying. If not playing by the rules, then a development officer should not be in the game.
- Team player – if unwilling to work with other development officers for other schools, colleges, and constituencies in a collegial manner, then a development officer should be sidelined.

With the implementation of some of these changes – tailored to meet your organization's culture – there is the possibility for significant and measurable quality in your quantity. Fully, fairly, and comprehensively assessing a library development program should include more than a qualitative summary of visits made, proposals submitted, and dollars raised. Evaluating the substance behind these numbers is more revealing and indicative of the health and sustainability of your development program. If you adopt a more holistic evaluation method, and if fundraising becomes more than “by the numbers,” success will soon follow.

References

1. Jennings, K. and Wanschers, J. (2006), *SPEC Kit 297: Library Development*, Association of Research Libraries, Washington, DC.