

ANNUAL REVIEW GUIDE

Nail Your Performance Appraisal in Six Hours



Chances are your performance review is underway or coming up soon. There's still time to make the most of it and position yourself for success this year, despite a tough fundraising environment. Here's the inside scoop.

Purpose of a Performance Review

Sure, you'll need to assess how effectively you helped your organization adjust with the times this past year, but your review shouldn't focus exclusively on the past. Seize this opportunity to impact your organization's future by clearly communicating what you've brought to the table recently, documenting what you learned from recent months, how you plan to respond and what you envision for the future. "You need to convey your passion for your organization's mission. Show your dollars raised, knowledge acquired, skills honed, and then explain how these factors are going to enable you to make an impact," says Ken Stein, Executive Director at the Austin Theatre Alliance (www.austintheatre.org). Now is the time to position yourself for success by demonstrating that you've done your homework, you know what works and you're taking the initiative to make it happen.



Measure What Matters

There are several key areas on which your performance should be measured and evaluated:

- » Results against plan (e.g., funds raised, prospects identified, growth of support base, event participation)
- » Overall strength of your organization (e.g., brand awareness, donor retention, organizational efficiency, staff productivity, morale, turnover and succession planning)
- » Public's trust in your ability to use donations transparently and effectively (outcome reporting)

Take ownership of the metrics on which you are judged: create a list of the metrics that matter now, not just what was in a plan made months or years ago. Be prepared to demonstrate how your chosen metrics correlate with bottom-line success at similar organizations (vendors should be able to provide aggregate data, case studies and references for this). Turn to employees for feedback on morale and overall satisfaction with their positions. Show that you have already begun to measure your own baseline metrics from last year, you've set targets for next year, and you've developed a plan to meet or beat your goals.

"Once I had hired the right people with the right skills, we started to tell the board where we wanted to go and why. We led the way."
— Ken Stein, Executive Director, Austin Theatre Alliance

Ken Stein served as the Director of Development for the Austin Theatre Alliance from 2002 to 2003, rejoining the organization as its Executive Director in 2004.

Document threats to achieving your goals at current course and speed. Under what circumstances could your team become more efficient and effective? It's your job to identify whether you need to upgrade your technology infrastructure, avail yourself of expert guidance, invest in training your staff, or seek outside help with activities that distract you from what your organization does best—delivering on your mission. If you can see your peers making headway while you fall behind, then find out what they are doing and use their success stories and those of organizations you admire as proof to support your recommendations. Show that you are a strategic leader by recognizing trends and capitalizing on them.

Increasing Development Capacity

You're judged on your ability to meet revenue targets and build a strong organization. If you fell short in a tough fundraising environment, then you'll need to identify ways to increase development capacity and boost morale going forward. Here are a few places to start:

- ✓ Do whatever it takes to enable yourself to spend more time with donors, really listening to why they give to your cause
- ✓ Reallocate funds from costly mailings (with two-month-old news) to less expensive, more up-to-date email newsletters that let you measure and report each story's popularity, plus build interest profiles for each subscriber
- ✓ Print and send fewer hard copies of your annual report, but make it easy to find this as well as compelling outcomes on your website 24x7
- ✓ Identify paths that new and upcoming supporters often take, and invest in scalable automation to convert more site visitors into subscribers, subscribers into donors, and donors into sustainers
- ✓ Add more fundraisers without adding staff by deploying personal fundraising software that can unleash the creativity and energy of your most ardent supporters
- ✓ Set quarterly goals for recruiting new subscribers and identify plans to achieve them
- ✓ "Learn what's working for other organizations—what it takes to succeed—then invest in your people and in the resources your staff is going to need," says Ken Stein. Where can you turn for great examples? Join the Association of Fundraising Professionals (AFP) and NTEN: The Nonprofit Technology Network and attend their conferences; pose questions on LinkedIn; read connectioncafe.com; follow [@kanter](https://twitter.com/kanter) on Twitter; etc.

Contact Convio if you want help in a hurry with project plans, case studies, projected costs or staffing suggestions as you build your business case: info@convio.com.

Six Hours to a Stand-Out Review

Annual reviews are most productive when executive leaders and board members get together to state expectations for the future and ensure alignment. Do NOT 'wing it' and take your board's feedback with an 'open mind'. You want to steer the direction of the conversation. In advance of your big day, provide your board with the appropriate framing, metrics, benchmarks and other information they might find helpful.

Don't use the excuse that you're too busy to do this prep work. How can you convince the board to invest in your ideas if you're not willing to invest in yourself? So, over the course of a week, go to bed an hour later and get up an hour earlier. These few hours are about going the extra mile for yourself and your mission: your efforts could determine how you spend the whole next year AND can ultimately deliver major results for your organization. Use the time like this:

Last Year in Review

- » **Hour 1** – Pull together key materials (e.g., job description, 5-year plan and an assessment of your organizational strengths, weaknesses, opportunities and threats).
- » **Hour 2** – Solicit current data (e.g. website traffic numbers) and written feedback (e.g. suggested improvements) from employees, program recipients and donors. Did your organization become stronger and more capable last year? Why or why not? What did you do that made a difference?

“When recommending an investment—be it in education or technology—show me how it is going to make you do your job better and thus deliver on our mission better. Prove it to me, and I'll find the budget for it in the future.” – Ken Stein

The Upcoming Year

- » **Hour 3** – Document your “Top 3” priorities for the upcoming year and how success should be measured on these priorities in one year's time.
- » **Hour 4** – Lean on external sources. Ask your network of industry contacts what it would take to achieve the level of progress you require. Be specific and give a deadline for any vendor proposals, etc.
- » **Hour 5** – Summarize the results of your review and findings and organize them into a brief memo with your recommended plan attached. Make sure objectives are measurable, achievable and time-bound.
- » **Hour 6** – Communicate your review and plan to your organization's leadership and board, making sure to be specific about what support you will need from them in order to deliver on your vision.

Next Steps

Uncertain economic times point out weaknesses and remind us of the importance of reliable systems and processes. During the rocky months behind us, more organizations than ever before recognized the importance of diversified revenue sources. Those who relied too heavily on unique and irreplaceable donors, sponsors, or personnel found that problems surfaced at just the wrong times in the business cycle, leaving organizations without expected funds, website updates, donor communications, or cash-flow projections. Investing in strategic, efficient, affordable, sustainable and scalable business systems can preserve your hard-earned progress, as well as your tenure as a leader.

“Now is the time to start, so you can be better prepared for what lies ahead,” emphasizes Ken Stein. It is far better to seize the opportunity of an annual review to draw attention to the steps you know must be taken soon, rather than to suffer through another year in frustration (or worse, have the rug pulled out from under you if times get even more challenging). Put your vision in motion now and invest in a development infrastructure that meets the latest industry standards, expands your staff’s fundraising capacity and positions you for success delivering against the organizational goals you set with your board.

Additional Resources

If you’re looking for support for your strategic initiatives this year, then consider Convio Go!™, a year-long, guided program where “we fish for you while we teach you to fish” with regards to online fundraising, marketing and communication. Over 100 organizations have chosen Go! to help develop their current staff’s online expertise, reducing the risk of introducing new technology with a programmatic approach. Participants raise on average \$3 for every \$1 invested. The result is a fast proof of concept so you can build fundraising momentum quickly. For more information, visit: www.convio.com/go.

You should also consider Common Ground™, a database product that can replace most, if not all, of your current databases, spreadsheets and other contact lists and consolidate them into a single system that can be used by your entire staff. Common Ground provides your organization with donation, volunteer and event management solutions and much more, allowing your entire organization to operate more efficiently and quickly, and get access to the valuable information and analytics that can help you perform successfully in the new year. For more information, visit: www.convio.com/commonground.

Additional Career Development Resources

» Association of Fundraising Professionals (AFP)
www.afpnet.org

» NTEN: The Nonprofit Technology Network
www.nten.org

» Check your local college or university for continuing education classes or degrees in nonprofit management.

» Certified Fund Raising Executive (CFRE) International
www.cfre.org

Example Convio classes:

- Online Strategy Clinic (3 pts)
- Go! Program (31 pts)
- Social Media Workshop (3 pts)



Notes

Hour 1

Hour 2

Hour 3

Hour 4

Hour 5

Hour 6

ABOUT CONVIO

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit www.convio.com.

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