

# The Emerging Digital Development Officer Role

The challenges and promise of virtual engagement

By **Meredith Barnett**  
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**By the time she became a donor experience officer** at the University of Pittsburgh in 2022, Julie Tauriello had worked in development for years—handling, she says, “all the old-school things, like direct mail for annual giving, senior gift, phonathon, stewardship.”

But as a DXO—a newly created role on the alumni annual giving team—Tauriello’s engagement tools would be primarily digital: Zoom meetings, video messages, email, social media. As Pitt defined it, she and one other DXO would be the Pennsylvania, U.S., institution’s digital-first fundraisers.

Within two months, she had proof this approach could work.

Tauriello reached out online to a Kansas City alumnus who frequently organized Pitt football watch parties but rarely trekked the 840-mile distance back to campus. He’d considered a planned gift in his will for years but hadn’t realized he needed to let the university know. A month later Tauriello had a statement of intent on her desk.

“It was great for the institution and now he’s even more engaged with the university,” she says. “We could say: ‘All right, this program is going to do big things.’”

Pitt and other development shops are experimenting with digital gift officer programs to engage specific donor audiences in new ways. Here’s a look at this emerging role within development—and what teams have learned so far about the challenges and promise of digital engagement with donors.

## Digital Trends and the Next Generation of Fundraisers

Development professionals have adapted to an increasingly digital world for years, since the earliest days of crowdfunding in the 2000s. But the COVID-19 pandemic accelerated virtual engagement across industries—one [McKinsey & Company analysis](#) called it a “quantum leap” of digital adoption. From 2019 to 2021, nonprofits saw a 42% increase in online giving—with higher education one of the top growing sectors, according to Blackbaud’s [2022 Charitable Giving Report](#).

“Working practices in every industry have changed massively,” says Philip Fisher, Development Manager at the University of Bradford in the U.K. “[For higher education], prospects wouldn’t have been comfortable setting up a Skype call with video before; now it’s just how things are.”

The pandemic challenged all advancement professionals to operate in a digital-first environment. Fisher started his major gifts career at Bradford in 2021 amid in-person engagement restrictions. Though now in 2023 he and other frontline fundraisers around the globe have returned to in-person activity, Fisher notes that there’s a new generation of fundraisers who are accustomed to hybrid and digital engagement. He [presented on this at the 2022 CASE Europe Annual Conference](#).

"In fundraising, there's been a demographic shift. Young fundraisers are going to see things differently and senior fundraisers are going to be managing people with different expectations," he says.

These hybrid or digital fundraisers are "spongy," Fisher explains—meaning they're willing to absorb new skills and ask questions. They're operating today in a rapidly changing digital and technological environment.

When Tauriello and her DXO counterpart Caleb Landmesser started at Pitt, their supervisor asked them to benchmark what other universities were doing with digital fundraising. When they connected with others working in this space, they found that teams are all over the map, Tauriello says. (This discovery led her, Landmesser, and two fundraisers at other institutions to start their own Digital Fundraiser Summit to swap advice.) Some universities have built their own DXO platforms in-house; others partner with one of the many vendors to create digital fundraising campaigns and engagement cadences. Some universities have dedicated digital gift officers; others distribute digital engagement responsibilities across several roles.

For advancement professionals active in the digital fundraising space, experimentation is par for the course.

"I love that. It's one of the biggest reasons I accepted the role here," says Landmesser, who worked in the private sector and alumni engagement before transitioning to development. "A lot of the things that work in frontline fundraising work for the digital and virtual realm, but there's nuance that we're still figuring out. That's the fun part."

## Portfolios, Metrics, Pivots

Digital gift officers or digital development officers focus on online engagement with typically mid-level donors. (The DGO/DDO terms are often used interchangeably with DXOs, donor experience officers.) But the role can be structured differently from institution to institution. Some DGOs manage donor portfolios, while others identify major gift leads and hand those contacts over to other development staff. Some target young alumni, unengaged donors, or leads surfaced from student call centers.

Many of these roles were created in the last few years—and some have already transformed as teams have pivoted with new approaches. Western Michigan University, for instance, brought on its two inaugural digital gift officers in 2022. One is Ariel Palau, a Florida transplant who originally worked in admissions and advising at the Kalamazoo, Michigan, U.S., institution. She calls last year her "pilot season" of trying a variety of outreach techniques and using software to automate messages. Now, she's customizing and personalizing communications instead and has tightened her portfolio from 3,000 last year to 500 now.

"This year, we're trying to be a little more thoughtful. Last year was about letting [contacts] know we're here," says Palau. "We're challenged every day to be creative in our outreach, try new things, and utilize the full toolbelt [of engagement strategies]."

This year she's working on short, personal introductory videos ("Thank you for donating to the therapy dog program!"). Her goal: making 14 touch points each quarter or semester with prospects in her portfolio. She sees her role as a bridge from the student call center: if the call center is a discovery pool, the digital gift officer is the next step up to connect donors to the institution.

Meanwhile, Kansas State University's digital development officers operate differently. The Manhattan, Kansas, U.S., institution is a veteran in this space: it hired its first DDOs in 2019. Senior Vice President of Development Eric Holderness calls the role "development officers without a travel budget," who are "prospecting not unlike we do in the major gift and discovery officer space. [They'll be] introducing concepts of giving to Kansas State, but via phone and video."

K-State's four DDOs don't manage portfolios but do use data to target specific audiences. DDOs, explains Holderness, complement the work of discovery officers who focus on donors most likely to give major gifts. Where K-State has particularly innovated with DDOs is around measurable goals. They quantify success with these three metrics:

- **Substantive contact.** "That's any interaction—whether it's email, phone, text, video—that moves a gift forward," says Holderness. They aim for 300 substantive contacts a year.
- **Leads generated.** K-State defines this as a person interested in philanthropy who wants to learn more.
- **Proposals added.** "If those leads were to result in a major gift proposal ... that comes to fruition, they're credited for that work as well," says Holderness.

Some institutions simply don't need to build out digital development officer initiatives because they're well-resourced or are already operating at high fundraising levels, he notes. The program is working well at K-State, he says, because the institution's donor pool has limited capacity—so "we have to hustle a little more, but that aligns well with the ways our donors are motivated."

## Reaching Audiences

A day in the life of a digital development officer can involve virtual meetings, donor calls and emails, following up with colleagues if a donor has questions about a scholarship or endowment, and maybe creating or sending a video. One of the job's challenges is cutting through digital noise to reach audiences. Today's alumni and donors—like all audiences in the digital age—are inundated with online information, email notifications, and enticing online distractions. Anything that can help differentiate a DGO's message and make it clear that "I'm not a robot—that goes a long way," says Palau.



One of her favorite tactics is to ask her donors or contacts for their preferred method of communication. Some will never engage on the phone but don't mind texts or email. (In fact, she has a 90-year-old in her portfolio who loves email. And he's great at it, she says.)

But if there's ever a misstep or breakdown in a relationship with a donor, it's very easy to ignore digital messages, Fisher points out. And glitches do happen: Once, he'd had promising conversations with a prospect in London but then heard nothing despite repeated emails and calls. Eventually he discovered his emails had just gotten stuck in the person's spam folder.

On the plus side, once a digital gift officer does forge a connection, cultivation and engagement can move along quickly. Prospects can be more willing to hop on a 15-minute Zoom or phone call than commute to a longer, in-person dinner or coffee chat. Tauriello says she has more fruitful visits now as a DXO than she did in her previous fundraising roles because contacts know exactly why she's reaching out and conversations can stay focused.

"There's more expectation [of purpose] in a digital environment. That can naturally lead to action and progress," says Fisher, who also notes that hybrid fundraising approaches can help development professionals close gifts faster—if they use the right tools at the right times.

Ultimately, digital fundraising is built on the same development building blocks of relationship management, emotional intelligence, and communication. Landmesser likes to say: "People value their time more than they value their money." Part of respecting their time, he notes, is consistency and authenticity.

"I need to make sure donors know I'm reaching out to hear them, not just talk at them and say, 'You know, we have this event coming up. See you later.' No, if we're scheduled for 20 minutes you have 20 minutes of my time. I want to hear about you," he says.

## Pipeline and Staff Development

Building a digital gift officer program can take time and investment. Though DGOs can (and do) surface surprise gifts or early wins, their greatest potential for impact is developing the donor pipeline—a long-term strategy.

"Senior executive leaders have to be willing to invest in fundraisers who technically are not incentivized to raise money; instead, they're creating as many conversations as possible and building the pipeline," says Holderness.

Beyond that, to nurture a DGO program, leaders and managers have to find great staff members, give them autonomy, and be comfortable with flexibility, suggests Holderness, which can take some courage.

But there's another (perhaps less obvious) benefit to digital gift officer initiatives, outside of the impact on fundraising. These roles can be talent development opportunities that give newcomers to the profession a taste of fundraising and stewardship and put transferrable skills to use. At K-State, two DDOs are former student gift officers. Western Michigan's Palau is a trained oboe player who'd never worked in fundraising before.

Because the work is digital, Pitt's Tauriello and Landmesser both work from home—which affords them a work-life balance that wouldn't have been possible in other roles, says Tauriello.

"If I wanted to be a frontline fundraiser and the only option was a major gift officer, I'd have to look into a different field [because of the travel]," she says. "Being able to stay and do work that I'm so passionate about but still have the balance of my family means everything to me."

## Digital Donor Engagement: What Really Works

*Digital gift officers share their best tips to reaching audiences online*

**Make links irresistible.** Though we live in the ChatGPT era, so far nothing beats online copy that sounds genuine, human, and interesting. Western Michigan University's Ariel Palau has experimented with that in her messages to donors: "My favorite app is the Weather Channel. It does clickbait-y headlines; I know I shouldn't click but I want to know the information! So I try that. One that got people was, 'You graduated from Western and you won't believe what happens next.'"

**Ask deeper questions.** At Kansas State University, frontline fundraisers are trained to ask donors probing questions to learn more about their interests. But digital development officers, Eric Holderness realized, could do that too. Asking a few follow-ups on a call—"Tell me more about what you're trying to achieve with this gift"—can turn a \$5,000 gift into a million-dollar gift. It's about "continuing a conversation, educating our donors about how they can make an impact, serving as an advisor in a way, and connecting them to experts," says Holderness.

**Take advantage of digital access.** Virtual meetings can connect donors and prospects to experts and leaders at your institution. At the University of Bradford during the pandemic, Philip Fisher and colleagues developed 30-minute, drop-in introductions for prospects to meet senior staff, such as the head of the School of Management.

"Hybrid activity gives greater ability for our prospects to get access to senior staff within the university. That can help us accelerate some of those [cultivation or stewardship] details," says Fisher.

**Rely on recency and relevance.** Personalizing messages isn't just adding a person's name to an email. Doing it well means adding relevant, recent details, suggests Holderness. For example: "Jack, I'd like to thank you for your recent gift to the College of Agriculture," or "Greetings, Penelope, and congratulations on surpassing \$10,000 of lifetime giving!"

**Humanize communications with video.** Even though donor experience officers like the University of Pittsburgh's Caleb Landmesser try to maximize efficiency to reach contacts, "we still want to make sure they know we're real people," he says. "Video is a way that people can be on the other side of the world and we're having a conversation."

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### Swap Ideas

Digital fundraising is always evolving; the activities development teams are undertaking now will be tomorrow's best practices. Landmesser and his colleague Julie Tauriello partnered with two other fundraising professionals to start the Digital Fundraisers Summit—a virtual forum for fundraisers to swap ideas. Connect with them on LinkedIn for updates.

Explore CASE's upcoming [in-person fundraising programs](#).

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