



INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland

Taking Care of Your Team During Turnover

DOING MORE WITH LESS

EXPLORE
PD25
New Depths

The logo for 'EXPLORE PD25 New Depths' is located in the bottom left corner. It features the word 'EXPLORE' in a large, bold, orange, serif font. Below it, 'PD25' is written in a smaller, white, sans-serif font. At the bottom, 'New Depths' is written in a large, orange, cursive script font. A decorative, swirling line in a light teal color is positioned to the right of the text.

While you're waiting, complete your session evaluations in the mobile app!

Taking Care of Your Team During Turnover

DOING MORE WITH LESS

EXPLORE
PD25
New Depths

JEN RUSSELL

Sr. Associate Director,
Prospect Development Operations
The Ohio State University

- 21 Prospect Development Team Members
- Team operations lead
- 10th year at OSU

THIS or THAT

Coffee

Tea

Lake

Beach

Stay Home

Go Out

Cats

Dogs

Books

Movies



HAVE YOU BEEN IN ANY OF THESE SITUATIONS?

Hiring freeze with
open positions

Overwhelming
workload

Unhappy team
members

Constantly shifting
priorities

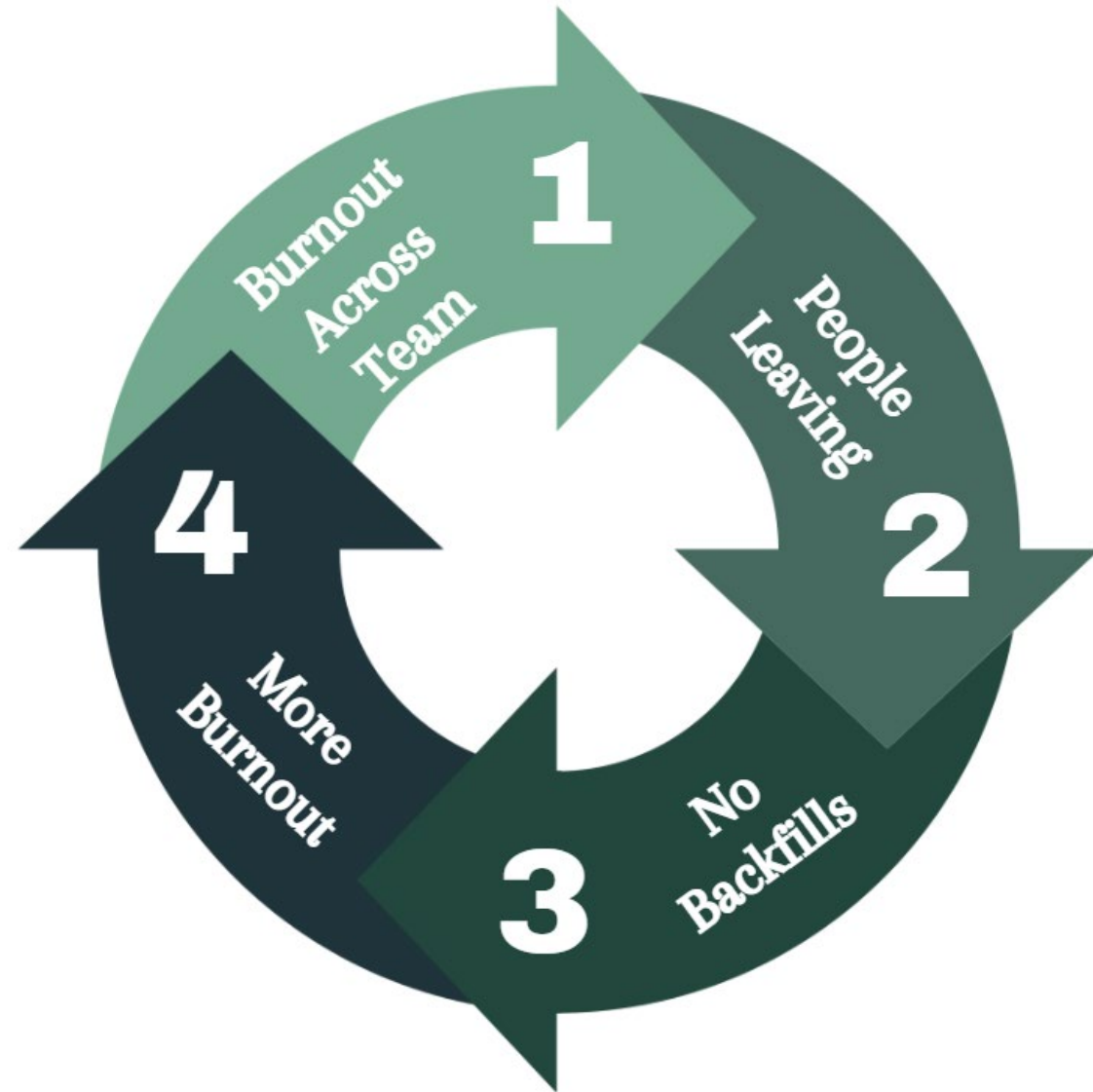
Repeat turnover

High levels of stress
at work or home

No time for proactive
work

2019 – 2023 STATE OF THE TEAM

- Hiring freeze
- Team culture at a low
- High levels of stress and work and home
- Amount of work did not decline
- Shifting priorities



WHAT CAN WE CONTROL?

Can Control:

- Team culture
- Burnout
- Workload & stress at work
- How we respond to leadership priorities

Cannot Control:

- Hiring freeze
- Budget reductions
- Changing leadership priorities
- Stress at home

ACTION PLAN

Top Priority: Take care of our team

- Transparent Leadership
- Workload Exercises
 - Start, Stop, Continue, Scale Back
 - Impact/Effort Quadrant
- Monitor Burnout
- Advocacy



TRANSPARENT LEADERSHIP

- Interim leaders
- Needed a change in leadership style
- Focus on transparent leadership
- Over communicate
- Address issues head on
- Provide flexibility whenever possible
- Team buy-in for decisions that impact them



QUESTIONS?



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WORKLOAD EXERCISES

We were drowning in work

- Fewer team members to complete the same amount of work
- No time to build automated processes
- Asked to take on additional projects
- Constantly changing priorities

Something had to give...



START, STOP, CONTINUE, SCALE BACK

1. Create a list of all ongoing tasks and projects that your team is involved in.

Prospect Profiles

New donor screenings

Database conversion project

Event snapshots

Portfolio consultations

Fundraiser training

Prospect identification

Monthly data audits

Full database screening

Unit meetings

Prospect pool analysis

Research requests

Automating data audits

START, STOP, CONTINUE, SCALE BACK

1. Create a list of all ongoing tasks and projects that your team is involved in.
2. The team members participating in each activity decide together which category each item falls into.
 - a) Start: New activities that we should add to our workload.
 - b) Stop: Activities we will no longer be doing or participating in.
 - c) Continue: Activities we should keep doing without making changes.
 - d) Scale Back: Activities that we should adjust our participation in.



START, STOP, CONTINUE, SCALE BACK

Start	Stop	Continue	Scale Back
Automating audits	Full database screening	New donor screenings	Prospect Profiles
	Prospect pool analysis (unless required)	Portfolio consultations	Database conversion project
		Prospect identification	Event snapshots
		Fundraiser training	Monthly data audits
		Research requests	Unit meetings

START, STOP, CONTINUE, SCALE BACK

1. Create a list of all ongoing tasks and projects that your team is involved in.
2. The team members participating in each activity decide together which category each item falls into.
3. Develop an action and communication plan for activities in the Start, Stop, and Scale Back categories.

Database Conversion Project – Identify 1-2 team members who can participate and relay necessary information.

Unit Meetings – Identify which unit meetings are most impactful and prioritize those.

Full database screening – Hold on process for now. We don't have the resources to handle the results.

START, STOP, CONTINUE, SCALE BACK

1. Create a list of all ongoing tasks and projects that your team is involved in.
2. The team members participating in each activity decide together which category each item falls into.
3. Develop an action and communication plan for activities in the Start, Stop, and Scale Back categories.
4. Repeat this process as needed.



IMPACT/EFFORT QUADRANT

Best used when Stop, Start, Continue, Scale Back is no longer alleviating workload or shifting priorities from leadership are impacting the workload.

1. Create a list of all ongoing tasks and projects that your team is involved in.

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Research requests

Prospect profiles

Event snapshots

Monthly data audits

Unit meetings

Database conversion

IMPACT/EFFORT QUADRANT

1. Create a list of all ongoing tasks and projects that your team is involved in.
2. Each person participating in each activity ranks the activity 1 to 5 for effort and impact. 1 = Low effort/impact; 5 = high effort/impact
 1. Effort: How heavy is the lift from you to complete the activity
 2. Impact: How much does the activity impact your overall team or organization goals
3. Average the scores from each team member

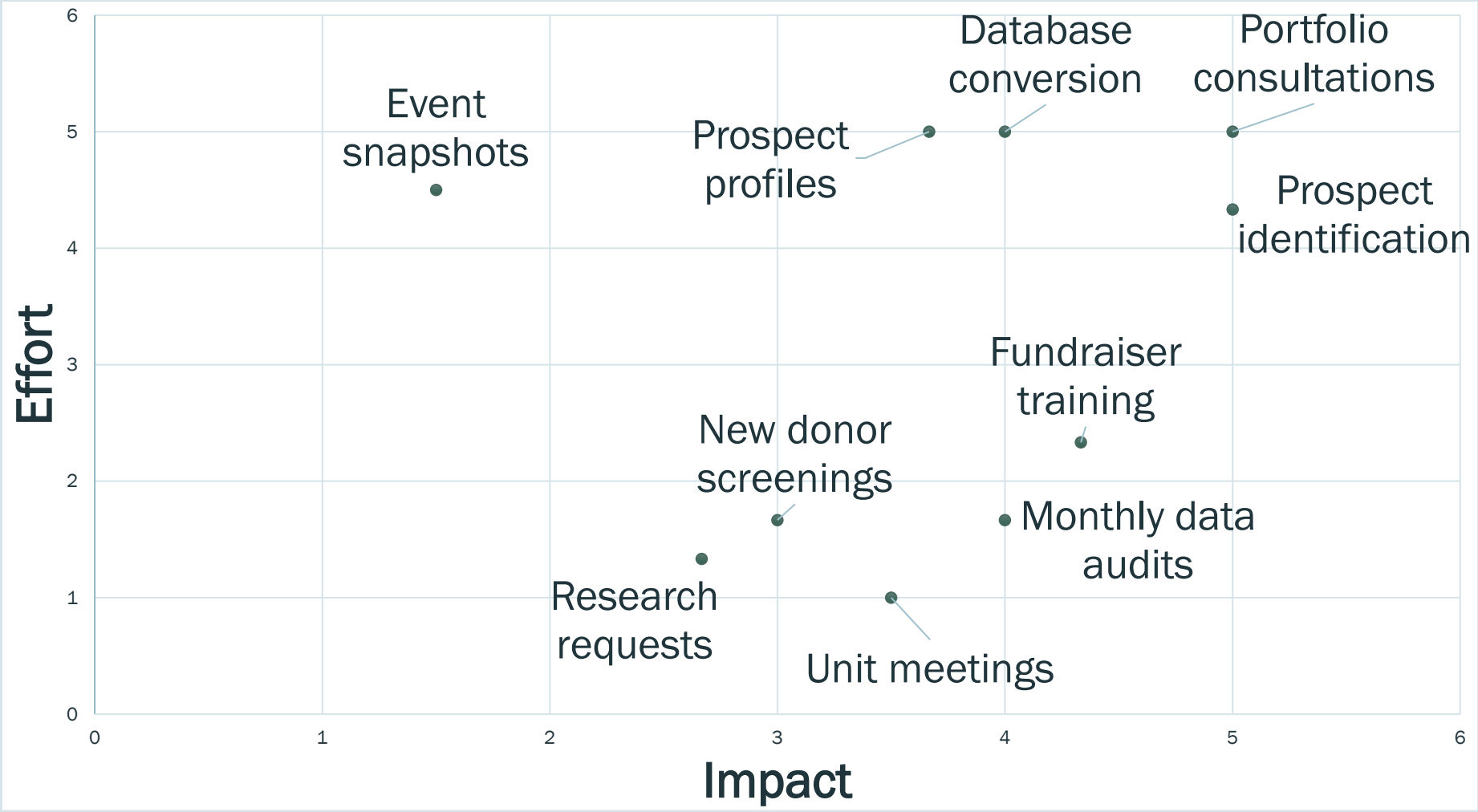
IMPACT/EFFORT QUADRANT

	JR		SL		EK		Average	
Activity	Impact	Effort	Impact	Effort	Impact	Effort	Impact	Effort
New donor screenings	3	1	3	2	3	2	3	1.67
Portfolio Consultations	5	5	5	5	5	5	5	5
Fundraiser training	4	2	5	2	4	3	4.33	2.33
Prospect identification	5	4	5	4	5	5	5	4.33
Research requests	3	1	2	1	3	2	2.67	1.33
Prospect profiles	3	5	4	5	4	5	3.67	5
Event snapshots	1	4	2	5			1.5	4.5
Monthly data audits	4	1	4	2	4	2	4	1.67
Unit Meetings			3	1	4	1	3.5	1
Database conversion	4	5			4	5	4	5

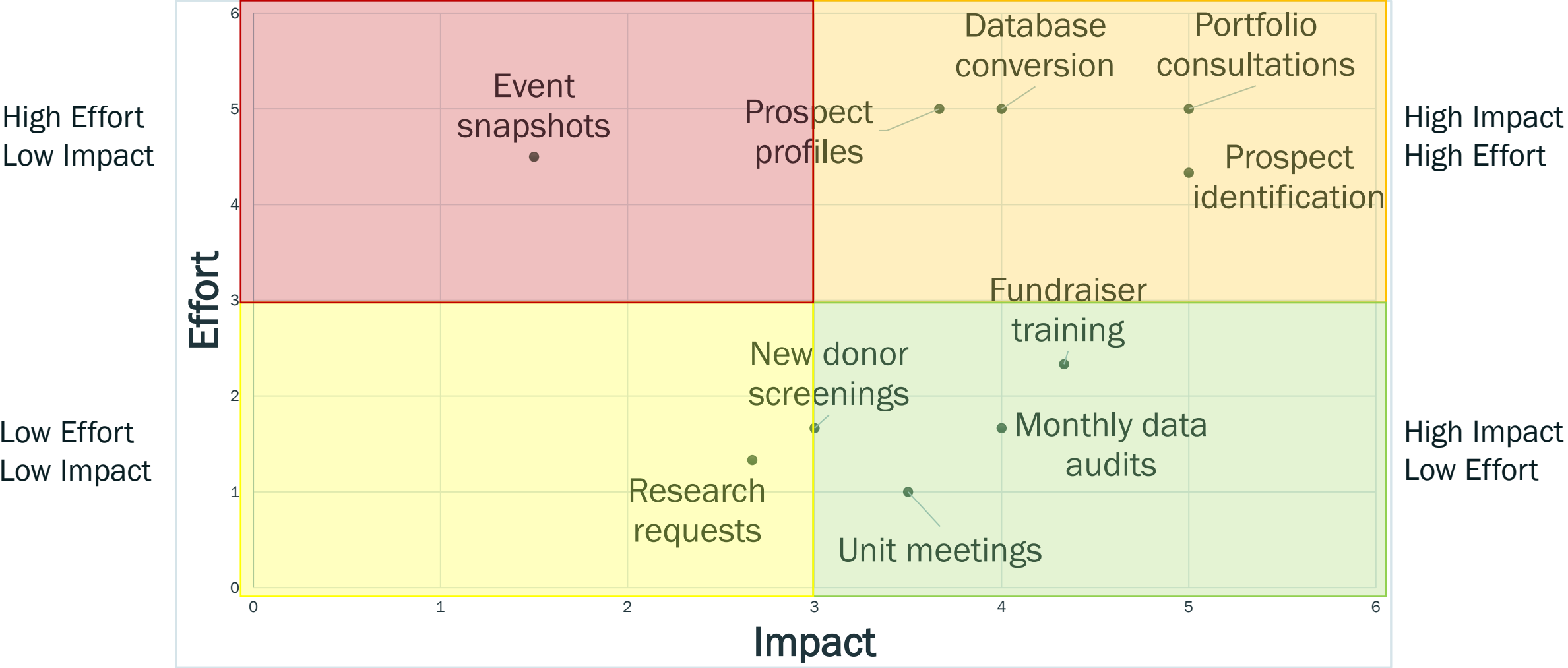
IMPACT/EFFORT QUADRANT

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3. Average the scores from each team member
4. Plot the averages on an Effort/Impact grid

IMPACT/EFFORT QUADRANT



IMPACT/EFFORT QUADRANT



IMPACT/EFFORT QUADRANT

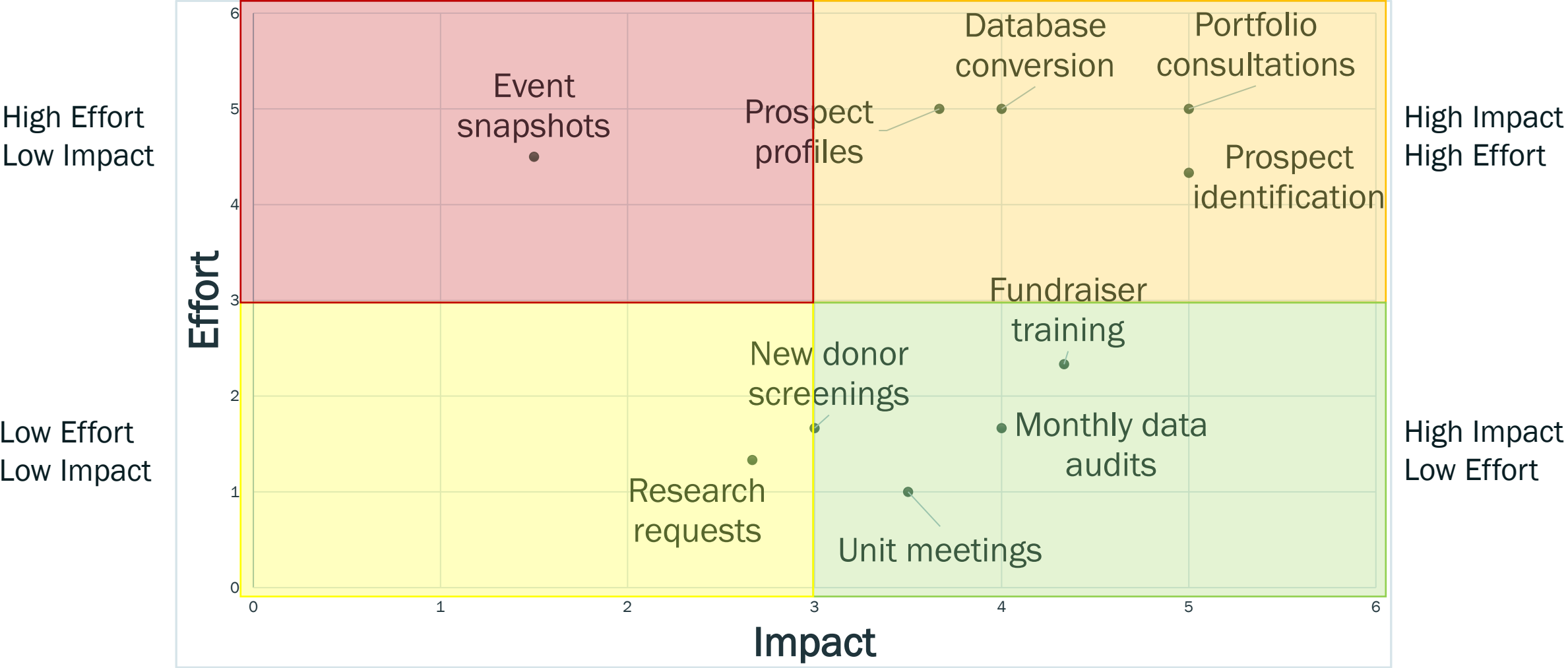
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3. Average the scores from each team member
4. Plot the averages on an Effort/Impact grid
5. Prioritize work based on results of grid



IMPACT/EFFORT QUADRANT

1. **High Impact/Low Effort:** Top priority
 - Keep doing these activities as you get the most impact for your work
2. **High Impact/High Effort:** Second priority
 - Keep doing these activities and evaluate if there is a way to scale back the effort on these activities.
3. **Low Impact/Low Effort:** Lowest priority
 - Add these activities in when time allows
4. **Low Impact/High Effort:** Stop
 - Find ways to stop, scale back, lower effort, or outsource these activities.

IMPACT/EFFORT QUADRANT



IMPACT/EFFORT QUADRANT

1. Create a list of all ongoing tasks and projects that your team is involved in.
2. Each person participating in each activity ranks the activity 1 to 5 for effort and impact. 1 = Low effort/impact; 5 = high effort/impact
3. Average the scores from each team member
4. Plot the averages on an Effort/Impact grid
5. Prioritize work based on results of grid
6. Repeat exercise as needed



QUESTIONS?



ACTION PLAN

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WHAT IS BURNOUT?

According to the World Health Organization,

“Burnout is a syndrome conceptualized as resulting from chronic workplace stress that has not been successfully managed. It is characterized by three dimensions:

- Feelings of energy depletion or exhaustion
- Increased mental distance from one’s job, or feelings or negativism or cynicism related to one’s job
- Reduced professional efficacy”

<https://www.who.int/news/item/28-05-2019-burn-out-an-occupational-phenomenon-international-classification-of-diseases>

SYMPTOMS OF BURNOUT

- Constant exhaustion, no matter how much you rest
- Dreading responsibilities you once enjoyed
- Feeling detached, unmotivated, or emotionally numb
- Struggling to focus or making more mistakes than usual
- Feeling irritable, anxious, or overwhelmed more often than not
- Having frequent physical symptoms like headaches, digestive issues, or muscle tension

<https://mhanational.org/resources/burnout-signs-causes-recover/>

BURNOUT POLL

- How do we keep tabs on burnout?
- Are our strategies to mitigate burnout working?
- What do we do with that information?
- Burnout Poll
 - Monthly check in
 - One question
 - Self-grade burnout level
 - Anonymous

BURNOUT POLL

How are you feeling this week?

- Level 1 – “I enjoy my work. I have no symptoms of burnout.”
- Level 2 – “Occasionally I am under stress, and I don’t always have as much energy as I once did, but I don’t feel burned out.”
- Level 3 – “I am definitely burning out and have one or more symptoms of burnout, such as a physical and emotional exhaustion.”
- Level 4 – “The symptoms of burnout that I’m experiencing won’t go away. I think about frustration at work a lot.”
- Level 5 – “I feel completely burned out and often wonder if I can go on. I am at the point where I may need some changes or may need to seek some sort of help.”



BURNOUT POLL

- Leadership team reviews results
- Track trends over time
- Ask 4s and 5s to talk to their manager
- Leverage results when advocating to leadership



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ADVOCACY

- Help leaders understand the challenges and how you're addressing them
 - Bring the data – burnout poll, benchmarking numbers, workload exercises
- Show impact of changing priorities
- Leverage resources available to you
 - Vendors, EAP, other teams, etc.

APPLICATIONS

- Work
 - Exercises can be done at individual, team, or organization levels
 - All size organizations can benefit from this work
- Personal
 - Burnout exists here too!
 - Try the workload exercises for your weekly to-do list
- Start small
 - Implement one piece that you can control
 - It takes time to see change – 5 years and counting for us

WHERE ARE WE NOW?

- Team culture at a high
 - Psychological safety
 - Burnout poll is more of a safety net now
 - Open, honest communication across all levels of the team
- Finding time to innovate is still challenging, but working towards it
- Using workload tools regularly
 - Must/Should/Could for project ranking
 - Impact/Effort ranking in annual planning
- Openness to changing and evolving as needed to best take care of people

QUESTIONS?



LET'S CONNECT

Jen Russell

Sr. Associate Director,
Prospect Development Operations

The Ohio State University

Russell.1066@osu.edu

Connect on LinkedIn



THANK YOU!

Please complete your session
evaluations in the mobile app.

