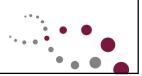


Current landscape



- Pressure to justify expenses
- Next phase of metrics
- Assessment culture





- Creates data to support:
 - Employment decisions
 - Requests for additional budget dollars
 - Importance of talent management
- Build culture of accountability
- ROI for individual fundraisers

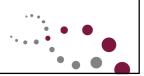


USciences

3 key areas for expectations

UScience
University of the Sci

- Annual activity measures
 - # personal visits
 - # proposals
 - # gifts closed
 - \$ gifts closed
- Portfolio management
- Budget management





Activity measures defined

- Personal visits: on campus or at prospect's location; not at event
- Proposals: documentation that gift officer
 (GO) asked <u>specific (assigned) prospect</u> for a <u>specific amount</u> to support <u>particular project</u>
- Gifts closed: amount of new gifts & pledges committed as direct result of GO's efforts





Portfolio & budget management

- Portfolio management:
 - Strategic approach to portfolio penetration
 - Adhering to requirements for action/contact reports
- Budget management:
 - Efficiency of travel & entertainment expenses
 - Expense reporting & reconciliation



POLL

- Do you include portfolio and budget management in performance expectations for your gift officers?
 - Yes
 - No





Q&A BREAK





HOW TO SET ANNUAL ACTIVITY MEASURES

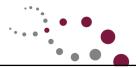
Major gifts officer example (major gift: \$25,000+)





New gifts & pledges committed

- How much does each MGO need to raise to achieve major gifts goal?
- EXAMPLE:
 - \$2,000,000 major gift goal for FY14
 - \$1,000,000 goal for MGO
 - \$1,550,000 goal for VP
- Tiered approach for # commitments:
 - -\$25,000 \$100,000: 8/year
 - -\$100,000+: 4/year





Proposals

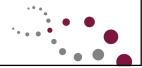
- How many proposals needed for MGO to achieve goal for new commitments?
- Determine yield rate
- EXAMPLE:
 - -\$25,000 \$100,000: 16/year
 - -\$100,000+: 8/year



Visits



- How many visits needed for MGO to achieve goal for proposals?
- Full-time, frontline fundraiser whose sole responsibility is cultivate, solicit and close
- EXAMPLE:
 - -12/month





MGO Annual Activity Measures

• # personal visits: 144

• # proposals:

- \$25K-\$100K: 16/year

- \$100K+: 8/year

• # gifts closed:

- \$25K-\$100K: 8/year

- \$100K+: 4/year

• \$ gifts closed: \$1,000,000





Q&A BREAK





Different measures by position

- Time expected fundraising vs. administrative tasks
- Specific department
- Vary by level of position, but consistent for those in same position



USciences University of the Sciences

Different measures by position

- Dir, Individual Giving
 - # personal visits: 50
 - # proposals:
 - \$25K-\$100K: 10/year
 - \$100K+: 3/year
 - # gifts closed:
 - \$25K-\$100K: 5/year
 - \$100K+: 1/year
 - \$ gifts closed:\$250,000

- Advancement Officer
 - # personal visits: 120
 - # proposals:
 - \$25K-\$100K: 12/year
 - \$100K+: 6/year
 - # gifts closed:
 - \$25K-\$100K: 6/year
 - \$100K+: 3/year
 - \$ gifts closed:





POLL

- Do you have different activity measures for different fundraising positions?
 - Yes
 - -No



ROI tool



- ROI of individual fundraiser performance
- ROI = dollars raised/cost of employment
 - Dollars raised: new gifts & pledges during FY
 - Cost of employment:
 - Gross salary +
 - Fringe benefits +
 - Travel & hospitality funds
 - (adjust if GO spends <100% time on fundraising)





ROI of MGO

- Dollars raised: \$1,000,000/FY
- Cost of employment:
 - \$115,000 salary (100% time)
 - -\$ 37,950 fringe (33%)
 - -\$ 15,000 T&E
 - \$167,950/FY
- ROI = \$1,000,000/\$167,950 = 595%



UScience University of the Science

Trial period

- Begin tracking upon hire, but provide trial period
- Length depends on experience





Evaluations

- Annual performance reviews
- Quarterly evaluations after close of quarter
 - Opportunity to provide constructive criticism, guidance and praise
- Template available



Implementation



- Advisable to begin with new FY
- Consistency is critical





Contact information

Carrie Collins, JD
Vice President, Institutional Advancement
University of the Sciences
600 South 43rd Street
Philadelphia, PA 19104

O: 215.596.8948 C: 215.840.5368

 $\underline{c.collins@usciences.edu}$

www.usciences.edu

http://www.linkedin.com/in/carriemcollins

Follow on Twitter: @CCollinsJD

