

# **JAA 2016**

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# **MARQUETTE**



# METRICS FOR GIFT OFFICERS:

Measuring in the real world

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# Overview

- Who we are
- Why use metrics
- Our structure
- Other metrics

# Who we are

- Prospect Development
  - 3 people
- Gift officers
  - 19 people and 3 new positions being hired

# Why use metrics?

## Different viewpoints

- Prospect Management
- Gift Officer
- Manager

# Why use metrics?

## Prospect Management

- Reporting
- Proactive work

# Why use metrics?

## Gift Officer

- Track progress and achieve goals
- Identify areas of assistance needed

# Why use metrics?

## Manager

- Motivates behavior
- Push performance
- Empower ownership on team members



# History

## Previous structure

- Focus on solicitation goal, close rate and visits
- Accessible twice a year

## Current structure

- Focus on many data points
- Accessible weekly

# Major Changes to metrics

- Automation of report
- Goal planning document and process

# Automate

- Performance metrics come out weekly
- Saves time
- Ensures accuracy

# Goal Planning

- Annual process to determine solicitations of portfolio
- Used, in conjunction with performance of previous year, to determine goal for next year

# What we measure against a goal

- Dollar value of solicitations closed
- Number of personal visits
- Number of major gift solicitations
- Number of closed deferred gifts

# Other things we track

- Number of discovery visits
- Other types of contact (phone, email, etc.)
- Matching gift money
- Dollar value of unrestricted solicitations
- Unsolicited revenue

# Metrics Report - Proposal Value

**NOTE:** This report includes all proposals where a linked gift or pledge was received in the current FY, regardless of when the Ask was made.

Solicitor Name	Solicitations Made	Unrestricted Closed	Other Closed	Matched Closed	Total Closed	Solicitation \$ Goal	% To Goal	Deferred Closed	Deferred Closed Goal	Deferred % to Goal
Gift Officer - School Liaison	779,490	\$112,149	395,753	16,300	524,202	600,000	87%	210,731	-	0%
Gift Officer - School Liaison	1,610,300	\$90,586	556,064	-	646,650	500,000	129%	600,003	-	0%
Gift Officer - School Liaison	3,211,950	\$15,500	70,450	-	85,950	-	0%	50,000	-	0%
Gift Officer - School Liaison	1,162,500	\$32,250	281,250	-	313,500	-	0%	-	-	0%
Gift Officer - School Liaison	4,252,234	\$113,660	1,427,712	-	1,541,371	1,000,000	154%	1,000,000	-	0%
Gift Officer - School Liaison	371,000	\$43,066	250,500	11,000	304,566	1,000,000	30%	1,500,000	-	0%
Gift Officer - School Liaison	141,450	\$6,250	50,700	-	56,950	-	0%	-	-	0%
Gift Officer - Programs	2,849,034	\$16,000	1,770,164	50,050	1,836,214	1,000,000	184%	-	-	0%
Gift Officer - Programs	9,031,876	-	1,168,983	-	1,168,983	1,500,000	78%	-	-	0%
Gift Officer - Programs	507,100	\$4,950	550,663	-	555,613	300,000	185%	-	-	0%
Gift Officer - Programs	647,500	\$146,741	402,087	-	548,828	750,000	73%	600,009	250,000	240%
Gift Officer - Programs	1,275,501	\$75,875	799,631	6,500	882,006	1,000,000	88%	275,863	1,000,000	28%
Gift Officer - Programs	1,007,456	\$43,522	166,894	7,500	217,916	200,000	109%	1	-	0%
Gift Officer - Regional	706,825	\$123,271	264,526	23,400	411,196	500,000	82%	10,000	-	0%
Gift Officer - Regional	245,265	\$80,789	100,165	11,600	192,554	200,000	96%	5	-	0%
Gift Officer - Regional	335,700	\$45,950	132,000	-	177,950	100,000	178%	10,000	-	0%
Gift Officer - Regional	683,015	\$82,350	404,186	44,683	531,219	450,000	118%	2	-	0%
Gift Officer - Regional	1,324,750	\$149,696	1,327,975	87,595	1,565,266	1,000,000	157%	210,734	-	0%

# Metrics Report - Proposal Counts

**NOTE:** This report includes all proposals where a linked gift or pledge was received in the current FY, regardless of when the Ask was made.

Solicitor Name	\$25+ Ask Count	\$25k+ Ask Goal	\$25k+ Ask % to Goal	All Closed Count	All Asked Count	Close Rate	Unrestricted Closed Count	Matched Closed Count	Deferred Asked	Deferred Closed	Deferred Goal	Deferred % to Goal
Gift Officer - School Liaison	8	15	53%	66	75	88%	18	5	1	\$1	3	33%
Gift Officer - School Liaison	13	10	130%	40	41	98%	23	-	4	\$4	3	133%
Gift Officer - School Liaison	4	-	0%	30	33	91%	10	-	1	\$1	-	0%
Gift Officer - School Liaison	6	-	0%	6	11	55%	3	-	-	-	-	0%
Gift Officer - School Liaison	17	15	113%	90	139	65%	36	-	3	\$1	3	33%
Gift Officer - School Liaison	3	15	20%	40	42	95%	10	3	1	\$1	3	33%
Gift Officer - School Liaison	2	-	0%	19	31	61%	2	-	-	-	-	0%
Gift Officer - Programs	29	35	83%	127	181	70%	3	2	1	-	5	0%
Gift Officer - Programs	18	15	120%	31	44	70%	-	-	-	-	-	0%
Gift Officer - Programs	7	8	88%	141	139	101%	8	-	-	-	3	0%
Gift Officer - Programs	8	10	80%	49	69	71%	21	-	15	\$10	7	143%
Gift Officer - Programs	11	15	73%	45	56	80%	15	2	15	\$10	10	100%
Gift Officer - Programs	4	5	80%	41	92	45%	21	3	1	\$1	-	0%
Gift Officer - Regional	10	8	125%	98	133	74%	68	3	1	\$1	5	20%
Gift Officer - Regional	1	2	50%	85	134	63%	66	6	5	\$5	1	500%
Gift Officer - Regional	7	2	350%	44	78	56%	32	-	2	\$1	-	0%
Gift Officer - Regional	8	7	114%	65	105	62%	43	4	2	\$2	7	29%
Gift Officer - Regional	9	8	113%	68	92	74%	44	8	2	\$2	4	50%



# Metrics Report - Contact Counts

Staff Name	All Personal Visits	Personal Visits Goal	% to Goal	Discovery Visits	Discovery Visit Goal	% to Goal	Phone CRs Count	Letter CRs Counts	Email CRs Counts	Event Counts	Att?	Att %
Gift Officer - School Liaison	76	115	66%	9	-	0	70	453	37	-	28	37%
Gift Officer - School Liaison	82	75	109%	-	-	0	135	193	210	15	53	65%
Gift Officer - School Liaison	59	-	0%	8	-	0	38	53	263	5	44	75%
Gift Officer - School Liaison	5	-	0%	-	-	0	1	4	4	-	2	40%
Gift Officer - School Liaison	109	115	95%	4	-	0	90	360	226	11	57	52%
Gift Officer - School Liaison	81	115	70%	13	-	0	99	127	177	1	28	35%
Gift Officer - School Liaison	51	77	66%	11	-	0	67	187	133	4	36	71%
Gift Officer - Programs	220	200	110%	1	-	0	534	500	36	10	184	84%
Gift Officer - Programs	40	80	50%	12	-	0	7	25	25	-	22	55%
Gift Officer - Programs	172	175	98%	68	-	0	521	287	396	50	133	77%
Gift Officer - Programs	104	100	104%	10	-	0	392	291	444	3	98	94%
Gift Officer - Programs	57	80	71%	2	-	0	315	341	147	1	16	28%
Gift Officer - Programs	92	85	108%	41	-	0	62	741	1,155	88	82	89%
Gift Officer - Regional	106	120	88%	17	-	0	139	449	524	1	95	90%
Gift Officer - Regional	98	125	78%	56	-	0	171	468	1,271	31	98	100%
Gift Officer - Regional	47	45	104%	6	-	0	106	95	532	2	45	96%
Gift Officer - Regional	90	120	75%	20	-	0	297	310	346	15	81	90%
Gift Officer - Regional	50	-	0%	10	-	0	43	44	92	5	20	40%

# Metrics Report - Unsolicited Revenue

Primary Manager	Receipt Nbr	Receipt Amt
Gift Officer - School Liaison	78	\$162,578
Gift Officer - School Liaison	102	\$400,232
Gift Officer - School Liaison	59	\$48,095
Gift Officer - School Liaison	2	\$20,200
Gift Officer - School Liaison	157	\$173,114
Gift Officer - School Liaison	103	\$389,064
Gift Officer - School Liaison	135	\$87,189
Gift Officer - Programs	257	\$766,869
Gift Officer - Programs	32	\$466,676
Gift Officer - Programs	184	\$412,741
Gift Officer - Programs	85	\$303,964
Gift Officer - Programs	70	\$130,644
Gift Officer - Programs	13	\$6,475
Gift Officer - Regional	116	\$142,395
Gift Officer - Regional	29	\$66,871
Gift Officer - Regional	89	\$46,433
Gift Officer - Regional	72	\$55,150
Gift Officer - Regional	43	\$307,296

# Other useful metrics

- Portfolio penetration
- Solicitations made vs solicitations closed
- Unrestricted goals

## Other useful metrics

- Movement through the pipeline
- Unique visits vs personal visits vs discovery visits
- Team goals vs individual goals

# Things to keep in mind about metrics

- Are your metrics measuring the right thing?
- Does everyone understand the reports?
- Is management messaging correctly about performance?

# Final Thoughts

# Questions?

## Contact us

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