

Measuring and Evaluating Your

ANNUAL GIVING STAFF

D. Scott Peters

Director, Annual Giving
University of Richmond



Richmond



Kelley

Richard K. Dupree

Assistant Dean, Development and Alumni Relations
Kelley School of Business, Indiana University

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Measuring and Evaluating Your

ANNUAL GIVING STAFF

The Institutional Backdrops

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Measuring and Evaluating Your

ANNUAL GIVING STAFF



Kelley

Indiana University and The Kelley School

- Major research institution
 - 7 campuses serving over 61,000 students (36,000 at Bloomington alone)
 - Overall alumni network of 540,000+
 - Kelley School enrolls 5,700 students annually (undergrad and grad programs)
 - 95,000 living Kelley alumni
 - Founded in 1820

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Measuring and Evaluating Your

ANNUAL GIVING STAFF



Kelley

Kelley's Shop at a Glance

- Office of 22
 - 14 professional staff
 - 4 administrative support
 - 4 technology/data integrity specialists
- Centralized/decentralized advancement structure
- Annual budget of \$2.3m (including HR)
- In fiscal year 2011, we spent \$.065 to raise each \$1.00

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Measuring and Evaluating Your
ANNUAL GIVING STAFF



Kelley

Kelley's Annual Giving Shop

- Staff of 4
 - 1 director of annual giving
 - 1 associate director of annual giving
 - 1 associate director of stewardship and special projects
 - 1 administrative assistant

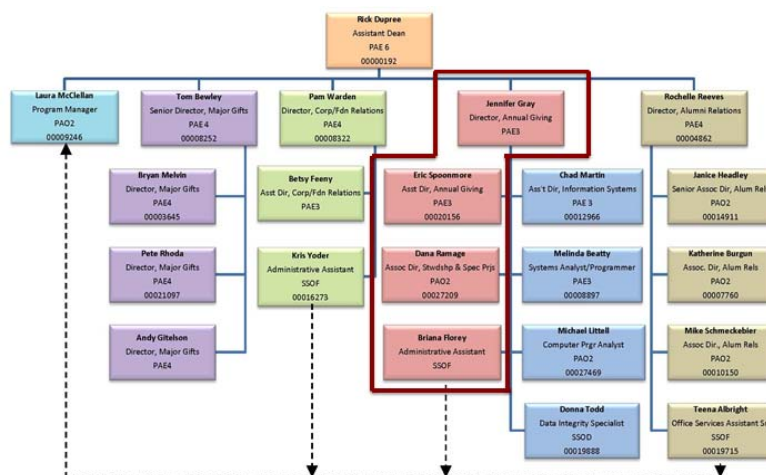
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ANNUAL GIVING STAFF



Kelley

Kelley's Current Shop Structure



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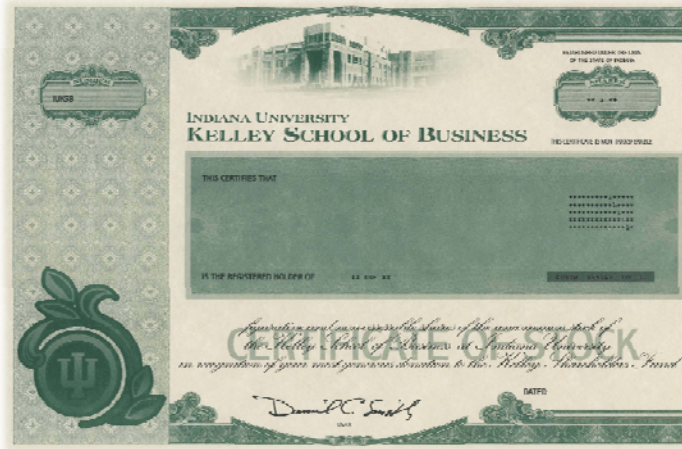
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Kelley

Gifts as Stock



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ANNUAL GIVING STAFF



Richmond

The University of Richmond

- Private liberal arts university
 - Three undergraduate schools (32,000 alumni)
 - One continuing education school (2,600 alumni)
 - One law school (5,900 alumni)
 - 2,800 undergraduate students and 450 law students
 - Founded in 1830

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ANNUAL GIVING STAFF



Richmond

Richmond's Annual Giving Shop

- 15 Staff members (11 salary, 4 hourly)
- Centralized office
- Total budget (compensation & operations): ~\$1M
- 7 annual funds (unrestricted, athletics, 5 deans' funds)
- Special projects (library, club sports, etc.)
- Cost to raise a dollar: ~\$0.18
- Fiscal year 2011 gift income was \$5,550,000

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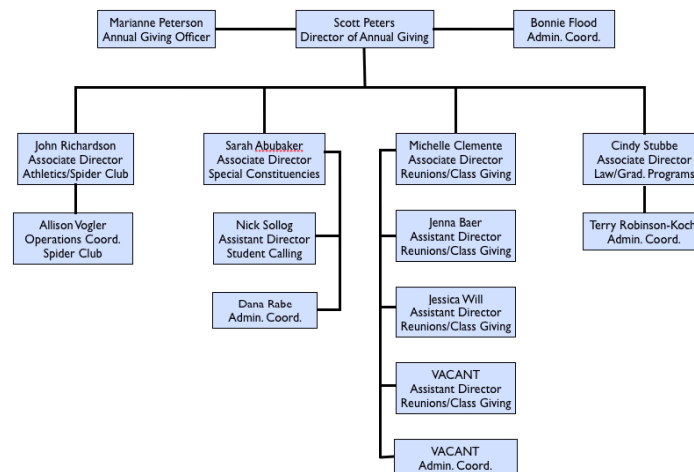
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Richmond

Richmond's Annual Giving Shop



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Measuring and Evaluating Your

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Aligning Your Metrics and Values

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Kelley

Why? What Are Your Needs?

- Specific
 - To build an endowment?
 - To fund a capital project?
 - To establish a donor base? (Annual giving)
- General
 - To have a validation of the investment in development?
 - To adopt a way to monitor development performance?
 - Development “blueprints”?
 - A reliable vehicle to reward stars outside the norm?
 - An incontrovertible “release” mechanism?

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Kelley

Origins of Kelley's Method

- System initially created in FY00 for "satellite" MG staff
- Provided ROI for proposed staff expansion
- "Catch and release"
- Expanded to CFR and AG in 2004; AR in 2008
- Ten significant revisions in twelve years

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Richmond

Richmond's Shop Mission Statement

- The mission of the University of Richmond Office of Annual Giving is to continually increase the number of donors to the University and secure ever-growing renewable financial support needed to sustain its commitment to excellence in teaching, learning and research. We educate students, alumni, parents and friends about the importance of philanthropy and engage these partners in the life of the institution through private contributions and volunteer opportunities.

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Staff Growth Justification

- Centralization of athletics and law functions brought much greater cost savings, efficiencies of scale, and enhanced coordination of programs
- Growth in class gift officers enables a much broader outreach to volunteers and donors
- Reach campaign goals

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Why Focus on Metrics?

- Office alignment with institutional goals
- Shared accountability
- Individual accountability
- Unit progress measurement

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Office Alignment to Institutional Goals

- Fulfill “The Richmond Promise”
- Develop stronger major gifts pool
- Increase volunteer engagement
- Grow next generation of alumni donors
- Increase alumni participation

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Let's Pause

- Questions?

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Measuring and Evaluating Your

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Generalists and Specialists

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Measuring and Evaluating Your

ANNUAL GIVING STAFF



Kelley

Kelley's Current Annual Giving Metrics

- Dollars
- Donors
- Contacts
- Giving level(s) increase(s)
- Faculty/staff campaign
- Alumni association life memberships
- Budget management
- **Non-credit credit**

GENERALISTS

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ANNUAL GIVING STAFF



Kelley

Annual Giving Generalist, Part I

- Dollars
 - Collectively shared goals, both the overall Annual Fund and Shareholder Fund include dollars raised through direct mail, telemarketing, and personal visits from any and all member(s) of the development/alumni relations staff

GENERALISTS

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Richmond

Phonathon Specialist Metrics

- Overall pledge goal: 5,250 (4,000 from alumni)
- Overall dollar goal: \$550,000
- Achieve 90% pledge fulfillment
- Increase pledge rate from 34.7% to 40%
- Increase average pledge from \$108.61 to \$120
- Increase pledge/maybe Ratio from 6.6/1 to 8/1
- Increase matching gifts from 6% to 10%
- Increase completion rate from 34% to 40%

SPECIALISTS

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Richmond

Phonathon Specialist Metrics

Project	Pool Size	Pledges	Maybe's	No's	Dollars	Credit Cards	Credit Dollars	Matches	Completes	Attempts
Athletics	4,416	523	160	640	\$62,196.00	76	\$9,530.00	20	1,897	13,318
Law	3,872	387	135	570	\$37,542.33	52	\$4,884.04	6	1,646	13,538
URAF	20,311	2,054	518	2,762	\$237,511.13	318	\$31,569.81	105	7,148	54,152
Schools	5,323	315	106	1,040	\$32,288.06	73	\$4,473.06	23	2,405	25,072
Reunions	4,192	374	78	766	\$39,190.00	66	\$6,025.00	18	1,748	15,599
Parents	2,637	503	141	756	\$45,650.11	106	\$8,650.11	27	1,656	8,017
MBA	193	17	3	19	\$910.00	3	\$150.00	1	50	352
Summer	635	37	25	217	\$1,980.00	8	\$695.00	1	328	2,403
Total	41,579	4,210	1,166	6,770	\$457,267.63	702	\$65,877.02	201	16,878	132,451

Project	% Complete	Pledge Rate	Avg. Pledge	Avg. Credit	% Credit	% Match	Atmp/Pledge	Atmp/Comp	Pool Remains	Maybe Ratio
Athletics	42.96%	39.53%	\$118.92	\$125.39	14.5%	3.8%	25.5	7.0	2,519	3.27
Law	42.51%	35.44%	\$97.01	\$93.92	13.4%	1.6%	35.0	8.2	2,226	2.87
URAF	35.19%	38.51%	\$115.63	\$99.28	15.5%	5.1%	26.4	7.6	13,163	3.97
Schools	45.18%	21.56%	\$102.50	\$61.27	23.2%	7.3%	79.6	10.4	2,918	2.97
Reunions	41.70%	30.71%	\$104.79	\$91.29	17.6%	4.8%	41.7	8.9	2,444	4.79
Parents	62.80%	35.93%	\$90.76	\$81.60	21.1%	5.4%	15.9	4.8	981	3.57
MBA	25.91%	43.59%	\$53.53	\$50.00	17.6%	5.9%	20.7	7.0	143	5.67
Summer	51.65%	13.26%	\$53.51	\$74.38	21.6%	2.7%	64.9	7.3	307	1.48
Total	40.59%	34.66%	\$108.61	\$93.84	16.7%	4.8%	31.5	7.8	24,701	3.61

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Direct Mail Specialist Metrics

- Maintain volume at ~100,000 pieces
- Increase revenue from \$570k to \$610k
- Increase response rate from 3.6% to 3.8%
- Increase average gift from \$161 to \$175
- Decrease cost/\$ from \$.14 to \$.13
- Decrease cost/donor from \$22.90 to \$21.75
- Enhance segmentation and tracking

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Kelley

Annual Giving Generalist, Part II

- Donors
 - Collectively shared, the total number of Dean's Associates goal includes alumni/friends attracted to invest in any program within the Kelley School and by any and all member(s) of the Development/Alumni Relations staff.

GENERALISTS

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Kelley

Annual Giving Generalist, Part III

- Contacts
 - Personal visits
 - All visits have to be documented in an approved tracking report in order to count against the goal
 - Phone
 - Phone calls have to be proactively generated by the officer and documented in an approved tracking report in order to count against the goal

GENERALISTS

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Class/Reunions Specialist Metrics

- Total Volunteer Goals:
 - Reunions: 150-200 total
 - Class giving: 50-75 total
- Visit goals: 570 across the team
- Solicitation goals: 660 across the team
- Valid employment data: +5%

SPECIALISTS

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Athletics Specialist Metrics

- Increase unrestricted revenue from \$900k to \$950k
- Increase restricted revenue from \$300k to \$350k
- Increase total donors from 3,100 to 3,300
- Increase alumni donors from 2,000 to 2,125
- Establish volunteer cadre of 10-15 people
- Implement solicitation code tracking

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Richmond

Athletics Specialist Roadmap

Roadmap (Leadership Gifts / Gifts > \$1,000 to Annual Fund (Unrest. + Rest.))

Web Level	Expected	Received	Remain	Lybunt
President's Circle (>\$50,000)	2	1	0	0
Founders (\$49,999>\$25,000) (Outstanding: Bud Smith)	3	3 (1-I / 1-R)	0	1
AD's Circle (\$24,999>\$10,000) (Outstanding: John Jones)	10	15 (6-N / 3-I / 1-R)	0	1
Gold (\$9,999>\$5,000)	20	27 (6-N / 6-I / 1-R)	0	1
Silver (\$4,999>\$3,500)	25	29 (2-N / 8-I / 1-R)	0	2
Rector's (\$3,499>\$2,500)	35	32 (7-N / 6-I / 4-R)	0	3
Richmond (\$2,499>\$1,000)	115	170 (95-N / 15-R)	0	20

**N – New Leadership Gift

**I – Increased Gift / Web Level from previous FY

**R – Reduced Gift / Web Level from previous FY

SPECIALISTS

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ANNUAL GIVING STAFF



Kelley

Annual Giving Generalist, Part IV

- Giving level increases
 - Focusing on specific area(s) or giving clubs to increase participation

DA Level Range	DA Level	FY11	FY10	Percent Growth
(\$5,000.00 +)	Partner	200	195	2.56%
(\$1,000.00 - \$4,999.99)	Director	436	477	-8.60%
(\$250.00 - \$999.99)	Associate	1132	1312	-13.72%
(\$0.01 - \$249.99)	Contributor	5685	6103	-6.85%
Total Dean's Associates		7453	8087	-7.84%

GENERALISTS

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ANNUAL GIVING STAFF



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Leadership Giving Specialist Metrics

- Increase unrestricted revenue from \$1,500k to \$1,650k
- Increase restricted revenue from \$1,300k to \$1,500k
- Increase undergrad alumni donors from 530 to 575
- Complete gift society transition to new structure
- Develop new leadership gift program materials
- Improve “roadmap” process to cover four layers (unrestricted, restricted, reunion, and deans’ funds)

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Richmond

Leadership Giving Specialist Metrics

- Leadership roadmap (all but athletics)
 - \$1,000+ lapsed from last fiscal year
 - \$1,000+ upgrade asks
- Leadership tracking
 - By gift Level
 - By constituency (alumni, parents, friends)
- Gift officer visit/solicitation numbers

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Annual Giving Generalist, Part V

- Faculty and staff campaigns
 - Both dollar and percentage of participation goals
 - Independent of IU's campus-wide faculty/staff campaign
 - All personal visits from AG staff and/or faculty/staff campaign co-chairs

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Richmond

Faculty and Staff Specialist Metrics

- Identify planning unit goals/projects
- Recruit appropriate volunteer leadership
- Increase participation from 55% to 75% from employees who are also undergraduate alumni
- Increase participation from 12% to 25% from employees who are not undergraduate alumni
- Increase gift revenue by ~50% (\$96k to \$150k)
- Triple payroll deductions from 30 to 90

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Annual Giving Generalist, Part VI

- Budget management
 - All travel, entertainment and stewardship is charged to the individual development officer's electronic "account"

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ANNUAL GIVING STAFF



Kelley

Annual Giving Generalist, Part VII

- Non-credit "credit"
 - The subjective part of the system - each development officer is encouraged to personally log acts of professional collegiality and/or "over and above" efforts throughout the year (for instance, standing in for an ill colleague, etc.)

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Measuring and Evaluating Your ANNUAL GIVING STAFF



Kelley



Evaluation Metrics
Jennifer Gray
Director of Development, Annual Fund (Fiscal 2012)

	Points	Goal
Acquisition	40	
Dollars (Overall Annual Fund)	(20)	3,500,000
Donors (Dean's Associates)	(20)	10,000
Contacts	25	
Personal	(10)	75
Phone	(15)	75
Dean's Associates	25	
Director	(15)	
Associate	(10)	
KSBA Life Memberships	5	
Budget management	5	
"Non-Credit" Credit	0	
	100	

AG Director Snapshot

GENERALISTS

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Measuring and Evaluating Your ANNUAL GIVING STAFF



Kelley



Evaluation Metrics
Eric Spoomore
Assistant Director of Development, Annual Fund (Fiscal 2012)

	Points	Goal
Acquisition	40	
Dollars (Overall Annual Fund)	(20)	3,500,000
Donors (Dean's Associates)	(20)	10,000
Contacts	25	
Personal	(10)	75
Phone	(15)	75
Faculty/Staff Campaign	25	
Dollars	(10)	100,000
% of Participation	(15)	100%
KSBA Life Memberships	5	
Budget management	5	
"Non-Credit" Credit	0	
	100	

Assistant AG Director Snapshot

GENERALISTS

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Measuring and Evaluating Your

ANNUAL GIVING STAFF

Let's Pause

- Questions?

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Technology, Tracking, and Buy-In

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Kelley

Technology Considerations

- How much time is spent grading and calculating?
- Does it affect your fundraising abilities?
- Can others govern the system on your behalf?

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Measuring and Evaluating Your ANNUAL GIVING STAFF



Kelley

Kelley's Homegrown Dashboard (Part 1)

	Total Points	Goal	Actual	Points Earned
Believe (1)	60	<= 300,000	286,029.43	4.9
• Overall Annual Fund	(10)	(2,700,000)	(127,572.92)	(0.5)
• The Shareholder Fund	(30)	(1,800,000)	(215,466.53)	(4.3)
Contacts (1)	25	150	0	0.0
• Personal	(10)	(75)	(0)	(0.0)
• Phone	(15)	(75)	(0)	(0.0)
Dean's Associates "Associate"/"Director" level's increase (1)	30	7,774	399	0.6
• Director	(11)	(400)	(4)	(0.1)
• Associate	(10)	(12,377)	(12)	(0.2)
• Contributor	(9)	(8,137)	(773)	(0.3)
Budget management (1)	0	<= 6,500.00	Bal. 6,500	0.0
"Non-Credit" (1)	0			
TOTAL	100			5.8

		View Contacts	Approve Appeals
Contacts Detail	Not Approved	Approved	
Personal	0	0	
Phone	0	0	
TOTAL	0	0	

¹ Collectively shared goals, both the overall Annual Fund and Shareholder Fund includes dollars raised through direct mail, telemarketing and personal visits from any and all members(s) of the Development/Alumni Relations staff.

² Contacts are defined as substantive (as determined by the Assistant Dean) personal visits, proactive (KSB-initiated) or phone calls.

³ The goal is defined as increasing the "Director", "Associate" and "Contributor" level populations of Kelley donors by 1% each from the end of FY10.

⁴ The FY11 T&E budget for this position will be \$6,500.

⁵ All Annual Fund officers are encouraged to personally log their acts/efforts of collegial support and assistance throughout the fiscal year, particularly when associated with other development officers both in and out of the Kelley program.

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Kelley

The Techno-Jargon

- “A Microsoft SQL database houses our data - and Adobe Cold Fusion serves as our primary scripting language. We also have a good mix of JavaScript and have implemented Cajon, which is the Cold Fusion adaptation of AJAX that makes asynchronous calls to the database server and loads data in bits and pieces as needed. However, you could use any combination of database and scripting language. Truthfully, **the backbone of our entire operation is a well-defined set of business practices or business logic** that our programmers employ to produce the custom business applications we use each day.”

-Chad Martin, Assistant Director, Information Systems, Office of Development/Alumni Relations, KSB

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Measuring and Evaluating Your

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Richmond

Dashboard Report

Annual Giving Report

June 30, 2011 (Final)		Change from '10
Total Annual Giving:	\$5,549,898	\$398,230
Total Undergraduate Alumni Donors:	8,718	371
Undergraduate Alumni Participation Rate	27.6%	

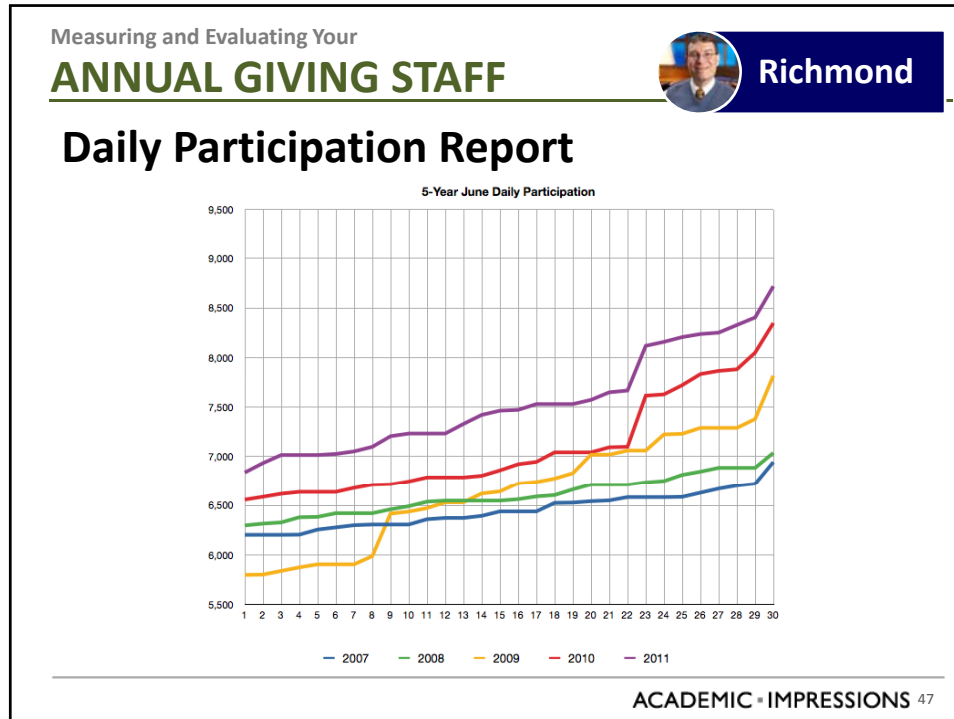
Total Annual Giving:

	Total Dollars	Total Donors	Unrestricted	Restricted
2010-11	\$5,549,898	14,526	\$2,071,846	\$3,478,052
2009-10	\$5,151,668	13,452	\$1,891,900	\$3,259,768
Difference	\$398,230	1,074	\$179,946	\$218,284


Undergraduate Alumni Giving: (a subtotal of Total Annual Giving):

	Total Dollars	Total Donors	Unrestricted	Restricted
2010-11	\$2,303,197	8,718	\$954,295	\$1,348,902
2009-10	\$2,023,605	8,347	\$756,367	\$1,267,238
Difference	\$279,592	371	\$197,928	\$81,664

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Measuring and Evaluating Your
ANNUAL GIVING STAFF

 **Kelley**

Fundraising Realities

- Good professionals are hard to find and keep
- Continual budget issues
- General hesitancy to invest in the unknown
- How long until a return becomes evident?

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Kelley

Pitching the Idea

- Short and long term gain
- Accountability in bureaucracies
- Clarity in business practices
- Business as usual

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Measuring and Evaluating Your

ANNUAL GIVING STAFF



Richmond

Pitching the Idea

- Institutionally-promoted goals (dollars and donors)
- Key reports to V.P. weekly
 - Overall office progress
 - Selected program progress
- Monthly report to entire division
- Quarterly board report
- Ad-hoc reports as needed/requested
- Know your numbers!

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Richmond

Report During Your Meeting

- At Richmond:
 - Overall:
 - Weekly with the AVP for development
 - Weekly with the associate director group
 - Programs: Weekly with each associate director
 - Overall and programs: Bi-weekly at the AG staff meeting
 - Quarterly: Individual performance evaluations
 - Bi-Annually: At the AG staff retreat

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Kelley

Show the Payback

- Gift income increases
- Quantitative **Return On Investment**
- Budgets are used more effectively
- Staff is motivated and becomes more valuable
- Planning is possible due to predictable cash flows
- Successive fiscal years are planned
- Budgets flow...and the boss is happy

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Measuring and Evaluating Your

ANNUAL GIVING STAFF

Takeaways

- Align your metrics with your goals
- Pitch metrics as a tool to help staff become better and more valuable, not as a performance monitor (that's a tangential, but an important by-product)
- Set achievable goals, solicit input but remain final arbiter
- Be consistent in your "grading"
- Prepare well-thought/defined goals and metrics before even **thinking** of technology!

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Thank You!

Questions?

D. Scott Peters



Richmond



Kelley

Richard K. Dupree

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