



National Capital  
**Gift Planning Council**  
ncgpc.org

NCGPC Planned Giving Days

# **Planned Giving Performance Metrics:**

A productive tool for measuring investment and return

May 24, 2018

# Speakers Today

**Stephen P. Link**

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Executive Director, Gift Planning,  
The Nature Conservancy

**Evelyn C. Morgner**

Director, Planned Giving and Transformational Gift  
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# Our objectives today

To help you develop fair and effective metrics to measure your performance and to drive your organization's results.

# Where Are You?

## Our first audience participation segment!

- How many of you have PG as your full-time job?
- How many of you have blended PG/Major Gifts as your job?
- How many of you are responsible for setting performance metrics?
- What percent of your time do you spend meeting donors/soliciting gifts?
- What percentage of your time is managing the metrics of others?



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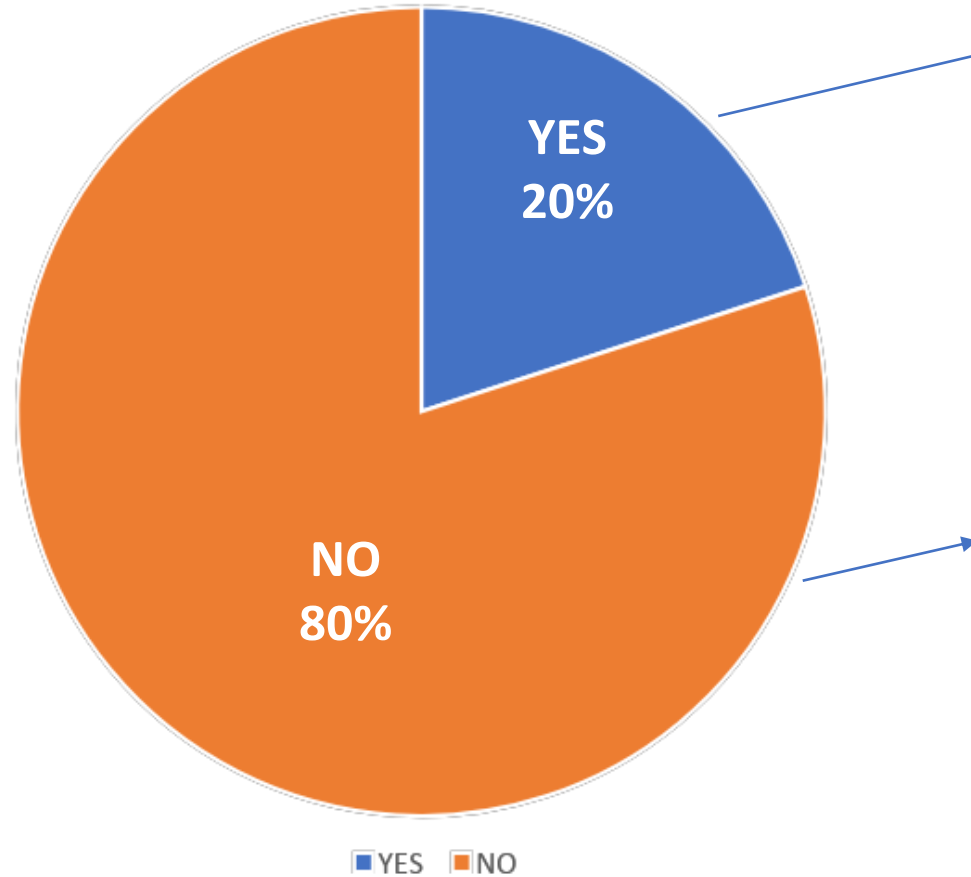
# **Perspectives on Performance Metrics from United Way's National Network**

**Evelyn Morgner**  
United Way Worldwide

# Perspectives on performance metrics-- Consider incorporating 3 key elements

- Ensure that some of the performance metrics are **shared between PG and MG staff to ensure effective collaboration** between the two functions
- Consider setting **strategic planned giving goals** that are supported by the Board and your CEO
- Set **Stewardship** measures to ensure **on-going dialogue** with legacy donors to keep the donors close

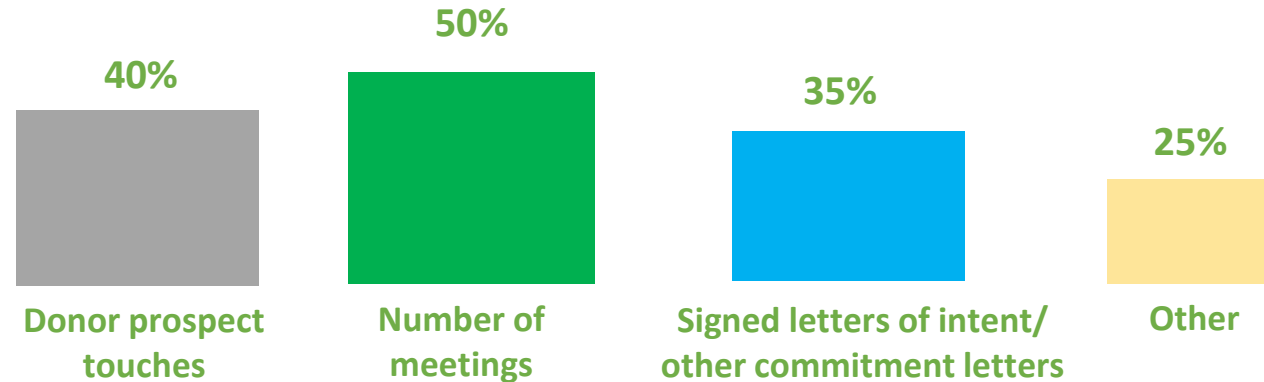
# Most United Ways surveyed in 2017 did not report annual \$ goals for planned gifts



For those that did have \$ goals, the amount cited ranged from - \$500,000 to \$4 Million  
All deferred/committed planned gifts, not realized

Most United Ways did not set annual goals for gifts, but instead cited that number of planned gifts or number of conversations with qualified prospects or number of new Legacy Society members were measured. Majority of goals were multi-year goals.

# Donor cultivation that is tracked includes several measurable actions



***Specific comments by individual United Ways in survey conducted in 2017***

- |  |   |   |  |
|--|---|---|--|
| <ul style="list-style-type: none"> <li>- 30/month</li> <li>- 3/week</li> <li>- 7/year/per donor</li> <li>- Donors must be qualified prospects</li> </ul> | <ul style="list-style-type: none"> <li>- 50-75 new planned giving conversations</li> <li>- 10 face-to-face visits/month</li> <li>- Conversations with planned giving prospects</li> <li>- 4/month</li> <li>- 5/month</li> <li>- 1/year/per donor</li> </ul> | <ul style="list-style-type: none"> <li>- Track signed letters of intent</li> <li>- Track other form of documentation</li> </ul> | <ul style="list-style-type: none"> <li>- “Satisfaction” survey conducted</li> <li>- New legacy leaders (8-10)</li> <li>- 2 newsletters sent per year</li> <li>- 1 principal gift solicitation</li> </ul> |
|--|---|---|--|



# Comments from individual United Ways

## UW in Florida

Start planned giving conversations with all of our Board members and with 50% of Tocqueville Society members by the end of the campaign year. Target to close 10% of Tocqueville Society members with new planned giving commitments by June 30, 2018

## UW in Florida

Long-term goal is to have half of our Board members make planned giving commitments by 2020

## UW

Major Gifts staff are asked to make at least 2 legacy gift asks per year

## UW in Florida

This is a shared goal between the Director of Major & Planned Giving, Chief Development Officer and Chief Executive Officer

## UW in Ohio

We collaborate on "The Ask" and there must be at least 5 Major Gift asks that have a planned giving component

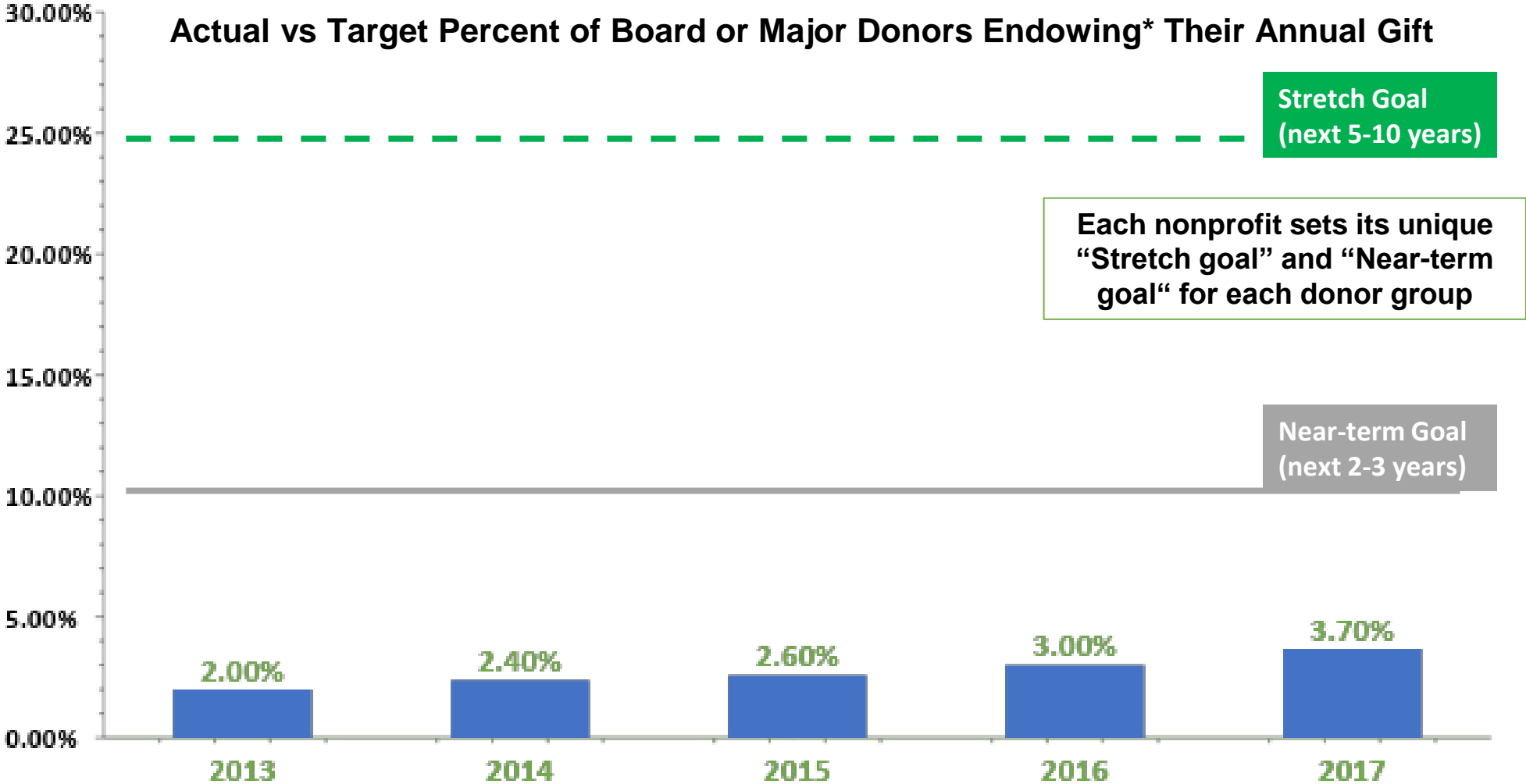
# Best practices for United Ways

- Track number of **measurable actions** -- target qualified donor touches, conversations or face-to-face meetings as well as signed letters of intent
- **Track collaboration** between Planned Gifts and Major Gifts staff especially number of introductions of qualified donors Major Gifts staff make to Planned Gifts staff. MG staff have to be incentivized to make introductions of qualified prospects to PG staff
- **Leave value of gift open-ended** to increase the probability that the ultimate gift is larger but recognize the planned giving action
- Bequest intents – preferably donor indicates a % of the estate (not \$ amount) or residual interest
- ***Beware of the metrics undermining the ultimate size of planned gifts***

# Best practices for United Ways (cont'd)

- Establish **shared PG goal** for PG staff, MG staff, CDO and CEO, **shared accountability and shared credit**
- Set goal for having **PG conversations with every current and past Board member**, and having x% of Board members commit to a planned gift (shared metric with your CEO) over next 24-36 months
- Have a **component of PG in each MG staff member's performance metrics** (x number of PG conversations with the donors in their portfolio, x number of qualified introductions to PG officer per year)
- Ensure recognition and effective **on-going stewardship** for these legacy donors so measure key stewardship actions

# A joint metric for both Major and Planned Giving staff is a collective goal against a strategic target



\* As evidenced by signed letter of intent or commitment letter

# In building your organization's unique PG metrics, you may design both individual and shared team goals

- 3-4 touches per target donor per year
- 1-2 face-to-face meetings with each target qualified donor per year
- \$x million in new expectancies in next 3 years
- X number of new planned gift letters of intent per year
- Minimum 50 new PG conversations in next 18 months with qualified prospects
- Ongoing donor stewardship to be defined and made scalable. Measure # of stewardship events by PG officer

## Sample Individual Planned Giving Goals

# In building your organization's unique PG metrics, you will want to include shared team goals

## Sample Departmental or Team Goals

- Minimum 50 donor introductions by MG staff to PG staff in next year
- Collective MG/PG/CDO/CEO goal of having at least x% of donors endowing their annual gifts
- Face-to-face meetings over next 3-5 years with every Major Gifts donor giving for at least 5 years
- Total expectancies goal of \$x million in 5 years
- Minimum 1 PG mailing to all MG donors or all donors in next 12 months



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# **Keeping It Simple...**

**Stephen Link**  
Georgetown University

# Ageless Wisdom

“First tell yourself what kind of person you want to be, then do what you have to do.”

~Epictetus, Discourses, 3.23.1-2a

“An archer is highly unlikely to hit a target she did not aim for.”

~Ryan Holiday and Stephen Hanselman  
The Daily Stoic



# The Merit of Metrics

- a goal
- a measure
- a source of satisfaction in accomplishment\*

\* when appropriately set

# Standard Metrics & Cautionary Tales

- Visits
- Proposals
- Closed & Countable Gifts

What counts & why?

# Supplemental Variations

- Tiered goals: minimum, solid, stretch
- Substantive Actions, Cold Calls, Marketing Leads
- Goals by Solicitation Size, Donor Capacity, Joint Credit/Partnership with MGOs
- Calibration to reflect programmatic, managerial responsibilities
- 'Green' vs 'Orange' Dollar credit

# Scalable Individual Metrics

- 120 Visits
- 10-15 Proposals
- \$1M - \$5M Closed Countable Gifts

## Adjustments:

- Visit goal decreases as mgmt responsibility increases
- \$ goal goes up with tenure/experience

# Leveraging Partnerships

- Internal Training - utilizing complex assets 'to add a zero'
- Flexibility in staffing - silent partner, baton pass, joint work
- Shared gift credit - MGO metrics and PG counting

# Weighted Individual Performance

- 50% - Visits, Proposals, Closed Gifts (metrics)
- 50% - Core Competencies:
  - Work Quality
  - Teamwork
  - Service Oriented
  - Results Oriented
  - Problem Solving
  - Work Integrity

## \* Additional Managerial Competencies:

- Managing employee performance
- Employee development
- Delegating responsibility

# CGP Metrics Guidance On The Way...

- The Case for PG (done)
- Programmatic (mostly complete)
- Individual (under development)

# Where to Go from Here...

- Identify critical priorities for your institution
  - short term and long term
- Build easily understood, collectable & reportable goals
- Provide regular progress reports
- Recalibrate when necessary for the unexpected





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# **Leveraging Performance Metrics to Drive Organizational Results**

**Angela Sosdian**

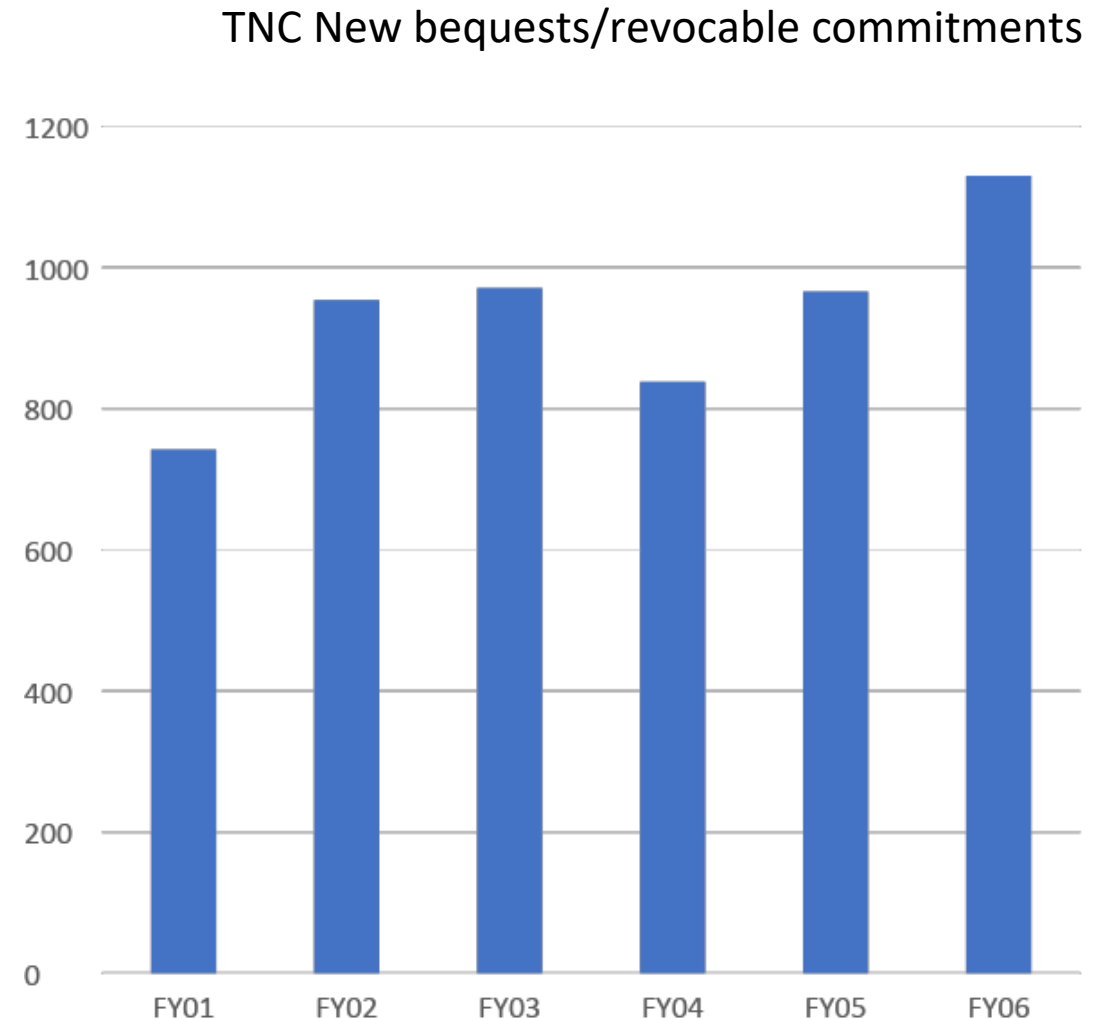
The Nature Conservancy

# Leveraging Performance Metrics to Drive Organizational Results

- The Nature Conservancy had a successful Gift Planning program for many years
- Productive and respected program
- Centralized marketing and outreach w/ stable budget
  
- With an upcoming campaign in 2007, we saw an opportunity to ramp up performance

# Leveraging Performance Metrics to Drive Organizational Results

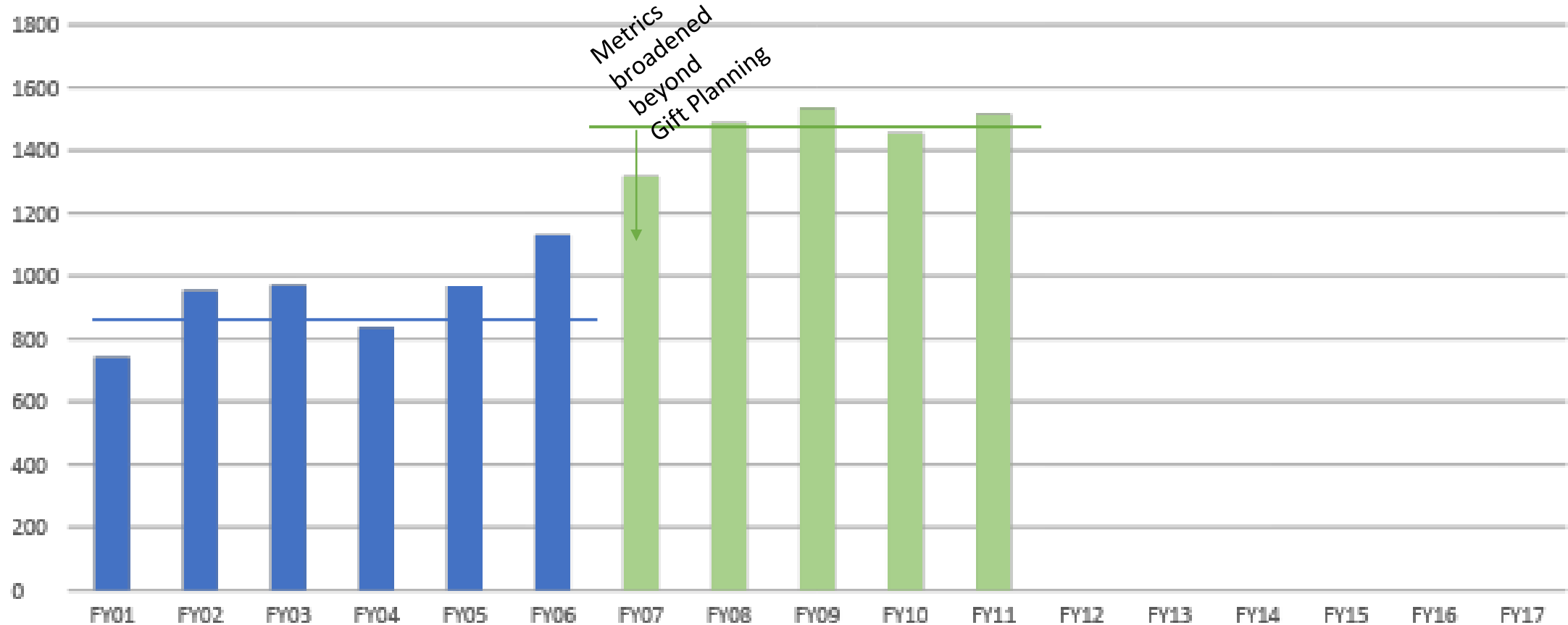
- Gift Planning program/staff had basic performance metrics
- But... Gift Planning metrics were not incorporated into other programs (Major Gifts, Principal Gifts, other programs)
- Gifts historically driven by Gift Planning staff & GP marketing program. Few leads generated by others.



# Our Campaign for a Sustainable Planet (2007-2011)

- Campaign Planning
  - First time counting Planned Gifts in a Campaign (other than realized gifts)
  - Opportunity to elevate visibility and to share accountability across operating units
- Campaign Goal Setting at the Business Unit Level
  - # Bequests, \$Goal (irrevocable & countable revocable)
  - Shared credit and goals with Gift Planning – essential for collaboration
- Road Show to Business Units (i.e., state programs)
  - Armed with data & discussion questions
  - Creation of a Working Group to advise on ways to incorporate gift planning activities

# New Bequests/Revocable Commitments



Campaign for a Sustainable Planet

Our World Campaign

# Leveraging Performance Metrics to Drive Organizational Results

- Using shared organizational performance metrics...
  - And with a concurrent investment in the Gift Planning program
- The Nature Conservancy was able to increase our new bequest/revocable notifications:
  - FY01-FY06      Average of 933/year
  - FY07 to FY11      Average of 1462/year – 56% increase from prior period

How much was attributable to metrics vs. the investment in the program?

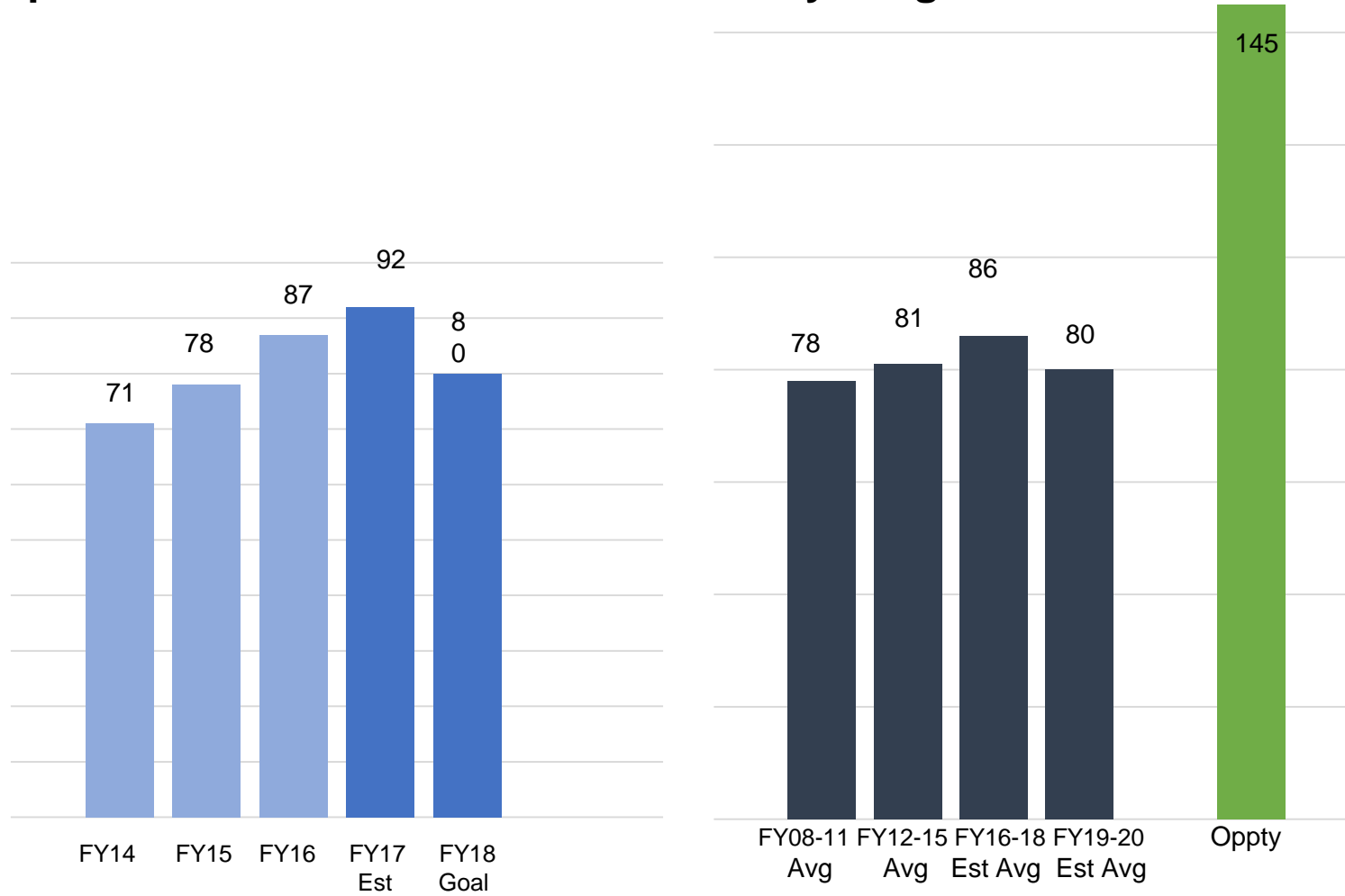
- Look to next iteration of metrics for indication

# Our World Campaign (2014 – present)

- “Market Opportunity” was layered into goals & metrics
  - In other words, how much should we be raising in each philanthropic market?
  - Process began in 2012, then incorporated into campaign planning
- Other factors were considered
  - Enabling conditions of each program
    - volunteer leadership, case for support, staff experience & tenure, etc.
  - Relationship between Major Gift Officers and Gift Planning

# Region A

## Bequest Notifications – Number Raised by Program



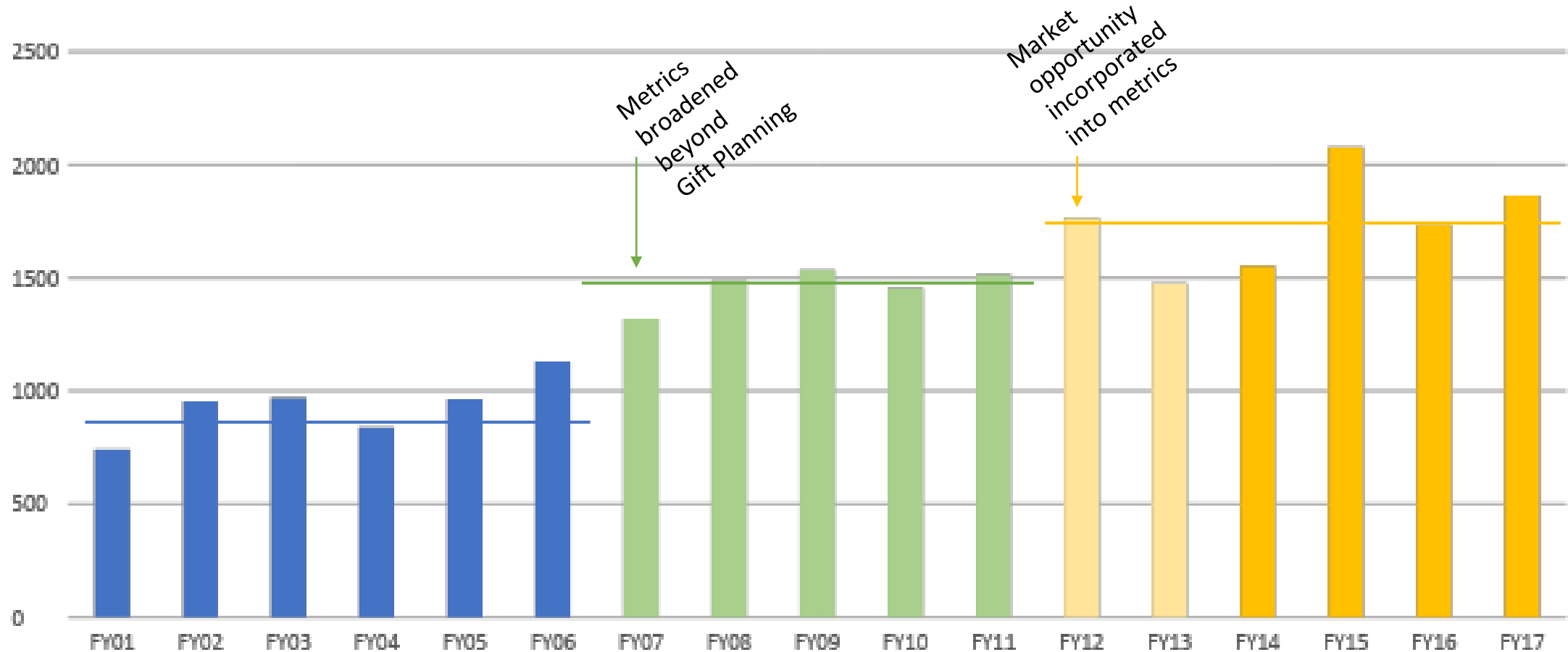
**FY17 Goal: 80**

**FY16-18 Estimate: 259**

**FY16-18 Goal: 208**



# New Bequests/Revocable Commitments



Campaign for a Sustainable Planet

Our World Campaign

# Leveraging Performance Metrics to Drive Organizational Results

- Using organizational performance metrics that included market opportunity
  - And with stable investments in Gift Planning
- The Nature Conservancy was able to increase our new bequest/revocable notifications:
  - FY01-FY06      Average of 933/year
  - FY07 to FY11      Average of 1462/year – 56% increase from prior period
  - FY12 to FY17      Average of 1745/year – 19% increase from prior period



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# **Q&A and Open Discussion**