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INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland




Meetings As A Metric



- Culture
- Motivation
- Measurement

What Makes a Good Fundraiser: Is the Devil in the Details?



Context Setting			
Fundraising Roles:	LAGO (10) MGO (26) LDO (20) Principal/SAVP (6) TOTAL (62)	LAG (15) MGO (136) Director (45) CDO (42) TOTAL (238)	DXO(5) MGO (78) MGL (9) TOTAL (92)
Living Alumni Count:	229,630	688,789	490,780
Total Database Records (Individuals):	718,643	2,595,189	1.4M Screened
Grateful Patient Program:	In Development	Yes	Yes
Database/Reporting:	bbCRM/Tableau	bbCRM/Tableau	Salesforce/Affinaquest PowerBI
Campaign Status	Launching Fall 2025, Goal TBD	Launched October 2024, \$7B Goal	Campaign Planning, Goal TBD



VCU Portfolio Composition Targets

	% Time Fundraising	Portfolio Size (Households)	Ideal Portfolio Composition*
Principal Giving/AVPs	50-75%	20-50	
Lead Development Officer	75%	60-100	
Major Gift Officer	85%	90-125	
Lead Annual Gift Officer	85%	50-150	

*Color key for portfolio composition: ■ Prospect Manager ■ Team ■ Stewardship ■ Discovery

VCU Fundraiser Annual Targets

	Portfolio Size	Number of \$50k+ Asks		Number of \$50k+ Asks Closed		Minimum Average Accepted Gift Size	Minimum Annual Raised Target	Portfolio Activation %	Minimum Cultivate	Referral Activity
		As PPM	As SS	As PPM	As SS	As PPM	As PPM			
Principal Giving/AVPs	20-50	14-18	1-5	7-9	1-3	\$375,000-\$2,800,000	\$2,750,000-\$20,800,000+	90%	20	90%
Year 1	20-50	8	0-5	4	0-3	\$250,000	\$1,400,000	90%	20	90%
Lead Development Officer	60-100	11-20	1-6	6-10	1-5	\$200,000-\$310,000	\$1,100,000-\$2,700,000	90%	60	90%
Year 1	60-100	7	0-6	4	0-5	\$100,000	\$600,000	90%	60	90%
Major Gift Officer	90-125	16-22	1-4	8-11	1-4	\$71,000-\$100,000	\$550,000-\$1,100,000	90%	90	90%
Year 1	90-125	12	0-4	7	0-4	\$50,000	\$290,000	90%	90	90%
	Portfolio Size	Number of Asks		Number of Asks Closed		Minimum Average Accepted Gift Size	Minimum Annual Raised Target	Portfolio Activation %	Minimum Cultivate	Referral Activity
		\$25k+	\$1k-\$25k	\$25k+	\$1k-\$25k	As PPM	As PPM			
Lead Annual Gift Officer	50-150	4-8	56	2-4	28	\$3,500-\$4,600	\$105,000-\$140,000	90%	50	90%
Year 1	30-50	2	45-60	1	26-30	\$2,200	\$57,500	90%	50	90%

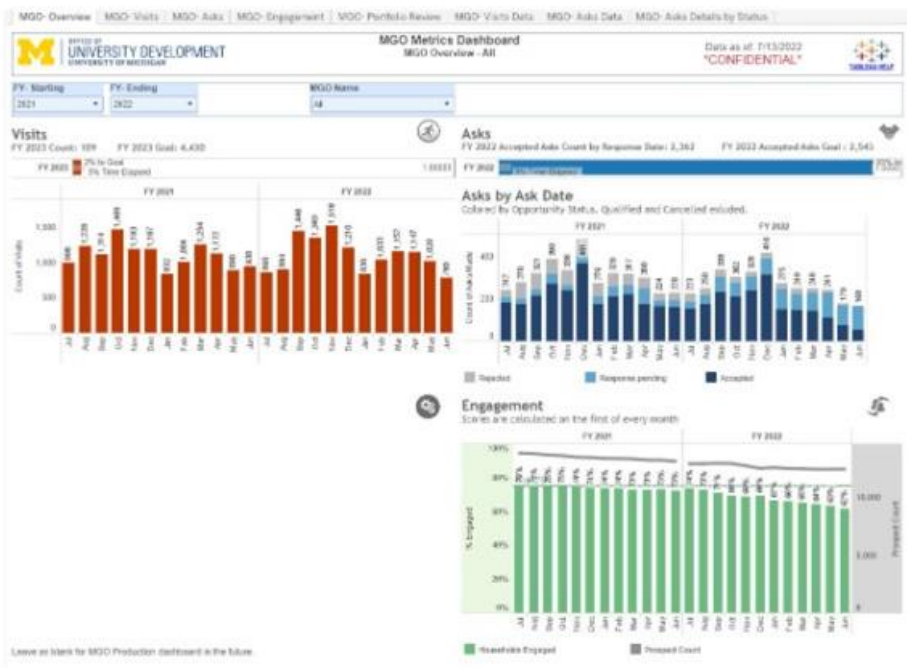
*Fundraisers are expected to work with their managers to determine where in the annual target ranges their individual annual goals should land. Things to consider include, but are not limited to, fundraiser tenure, size and capacity of prospect pool, etc.



Michigan's Current (Old) Metrics and Engagement

- Michigan has utilized the same engagement criteria and MGO metrics since 2015, with small updates along the way and refinement of our dashboards and reporting
- The current engagement and metrics are captured through a Portfolio Engagement Score and Metrics Matrix that are displayed in the MGO Metrics Dashboard

MGO Metrics Dashboard



UM Metrics Matrix

University of Michigan Community Performance Guidelines for Fundraisers										
Fundraiser Type (1)	Management Responsibility	Percentage of Time spent on Fundraising (2)	Maximum Possible Size (3) (MFA and/or MFAA)	Time Spent (4) (Hours per week)	Number of Fundraising Events (5) (Minimum and Maximum)	Qualification Matrix (6)	Relationship Matrix (7) (Minimum and Maximum)	Number of Managed Asks (8) (Minimum and Maximum)	Number of Managed Asks (9) (Minimum and Maximum)	Collaborative Team Size (10)
Case A: Chief Development Officer / Executive Director	Yes	50% - 100%	\$0 - \$50	90%	50-100 (75)	6-8	6-10	10-20-25	5-7-25	5-7-25
Case A: Director of Development / Major Gift Officer, Lead	Yes / No	10% - 50%	\$25-100	75%	80-100 (120)	15-20-25	9-24	25-20-25	10-15-20	7-10-15
Case A: Major Gift Officer, Senior	No	70% - 80%	\$25-100	75%	80-100 (120)	15-20-25	9-24	25-20-25	10-15-20	7-10-15
Case A: Major Gift Officer, Intermediate	No	80% - 80%	\$25-100	75%	75-80 (100)	10-25-30	8-20	10-25-20	5-10-15	5-7-10
Case B: Relationship Annual Giving Officer	No	10% - 70%	Not required by Market Segment	75%	\$20-100 (100)	10-15-18	N/A	10-25-20	5-10-15	5-7-10
Case C: Relationship Manager, Senior	Yes	10%	\$0-50	75%	10-100 (100)	N/A	6-10	5-10-20	5-10-15	5-10-15
Case C: Relationship Manager	No	10%	\$0-50	50%	10-100 (100)	N/A	6-10	5-10-20	5-10-15	5-10-15
Case A: Foundation Officer 1	Yes	40% - 50%	\$0-50	75%	10-25-50	N/A	1-10	10-100-100	10-25-40	5-10-15
Case A: Foundation Officer 2	No	60% - 80%	\$0-200	50%	10-25-50	N/A	1-10	10-100-100	10-25-40	5-10-15
Case A: Planned Giving, Director	Yes	40% - 50%	\$0-75	75%	1-10	10-15	11-22	12-25	9-18	12-25
Case A: Planned Giving Officer, Senior	No	80%	\$0-100	75%	1-10	10-15	14-28	15-30	9-18	15-30
Case A: Planned Giving Officer, Intermediate	No	80%	\$0-75	75%	1-10	10-15	12-24	10-18	6-12	10-20



Michigan's Current (Old) Engagement Score

What is Engagement?

"Engagement" is a term we use to describe whether prospects are being actively engaged to contribute philanthropic support to the University of Michigan.

A prospect is considered **engaged** when they have two of the following three criteria documented in DART:

1. A **Visit** by a Gift Officer in the last 12 months.
2. A **Gift Officer Capacity Rating** dated in the last 24 months.
3. An **'Engaged' Plan** on the prospect's record, which includes one of the following:
 - a completed step in the last 90 days
 - a planed step dated within the next 90 days
 - a closed ask/opportunity (status of Accepted or Rejected) in the last 90 days
 - an open ask/opportunity (status of Unqualified, Qualified or Response Pending)

In portfolio dashboards and reports, you may see prospects categorized as the following:

- **Properly Engaged:** Prospects have 2 or 3 of the described criteria
- **Re-Engage:** Prospects have only 1 of the described criteria
- **Move Suggested:** Prospects have none of the described criteria

Your "**Engagement Score**", found on the [Metrics Report](#), is the percentage of prospects in your managed portfolio that are in the Properly Engaged category.

Michigan's Current (Old) Metrics Matrix

University of Michigan Community Performance Guidelines for Fundraisers

Fundraiser Type (1)	Management Responsibilities	Percentage of Time spent on Direct Fundraising	Maximum Portfolio Size (2) (Mgt. and CRM) (Household)	Pros. Mgr. Portfolio Engagement (3) (Target)	Number of Face-to-Face Visits (Significant Visits) (4) (Annual)	Qualification Visits (Annual)	Stewardship Visits (5) (Annual)	Number of Managed Asks (6) (Annual)	Number of Managed Asks Closed (6) (Annual)	Collaborative Team Asks (7) (Annual)
Type 1: Chief Development Officer / Executive Director	Yes	30% - 50%	50-100	90%	55-65-75	4-6-8	6 - 15	10-15-20	5-7-10	5-7-10
Type 2: Director of Development / Major Gift Officer, Lead Director of Major Gifts, etc...	Yes / No	50% - 80%	125-200	75%	85-100-120	15-20-25	9 - 24	15-20-25	10-15-20	7-10-15
Type 3: Major Gift Officer, Senior	No	70% - 80%	125-200	75%	85-100-120	15-20-25	9 - 24	15-20-25	10-15-20	7-10-15
Type 4: Major Gift Officer, Intermediate Major Gift Officer, Associate	No	60% - 80%	125-200	75%	75-90-100	20-25-30	8 - 20	10-15-20	5-10-15	5-7-10
Type 5: Leadership Annual Giving Officer	No	50% - 70%	Determined by Market Segment	75%	120-144-180	96-115-144	N/A	10-15-20	5-10-15	5-7-10
									plus qualified referrals	
Type 6: Corporate Relationship Manager, Senior	Yes	50%	10-30	75%	60-100-140	N/A	6 - 14	5-10-20	3-5-10	5-10-15
Relationship Manager	No	50%	10-50	50%	60-100-140	N/A	6 - 14	5-10-20	3-5-10	5-10-15
Type 7: Foundation Officer 1	Yes	40% - 60%	30-50	75%	20-35-50	N/A	2 - 10	30-100-200	10-35-80	5-10-15
Foundation Officer 2	No	60% - 80%	50-200	50%	20-35-50	N/A	2 - 10	30-100-200	10-35-80	5-10-15
Type 8: Planned Giving, Director	Yes	40% - 60%	50-75	75%	110	10-15	11 - 22	12-25	9-18	12-25
Planned Giving Officer, Senior	No	80%	60-100	75%	140	20-35	14 - 28	15-30	9-18	15-30
Planned Giving Officer, Intermediate	No	80%	50-75	75%	120	25-40	12 - 24	10-20	6-12	10-20

Wisconsin Metrics

2025-2026 Development Metrics	Associate DoD	DoD (No)	DoD (Yes)	Senior DoD (No)	Senior DoD (Yes)	AVP (No)	AVP (Yes)	VP (No)	VP (Yes)
Contact (including meetings)	500	450	370	425	350	275	220	220	200
Qualifications	70	40	35	35	30	25	20	10	10
Major Gift Solicitations (\$25K+)	12	22	19	26	22	20	15	12	11
Major Gift Commitments (\$25K+)	9	12	10	18	15	15	13	10	8
Deferred Gift Commitments	2	3	3	3	3	3	3	2	2
Dollars Raised	\$800,000	\$2,750,000	\$2,350,000	\$3,500,000	\$3,000,000	\$5,250,000	\$4,500,000	\$8,000,000	\$6,000,000

2025-2026 Development Metrics	Gift Planning DoD (no)	Gift Planning Senior DoD (no)	Gift Planning AVP (Yes)	Gift Planning VP (No)	Gift Planning VP (Yes)	Foundations Relations DoD	Managing Group Leader (Yes)
Contact (including meetings)	450	425	220	220	220	50	165
Qualifications	40	35	20	10	10	30	10
Major Gift Solicitations (\$25K+)	22	26	15	12	11	5	11
Major Gift Commitments (\$25K+)	12	18	13	10	8	3	5
Deferred Gift Commitments	12	18	13	10	8	0	1
Dollars Raised	\$4,000,000	\$6,000,000	\$7,000,000	\$14,000,000	\$10,000,000	\$1,250,000	\$4,500,000



Wisconsin Metrics

DoD Metrics
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Performance Year
2025

Fundraiser

Role
Managing Group Leader

Appointment %
75%

Fundraiser

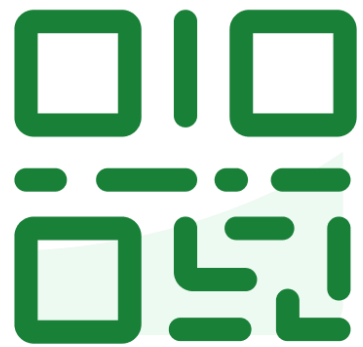
Performance Year

2025

Metrics Summary

Development Metric	Rank	Goal	Actual	% Attainment	Weighted Score	Peer Avg. Score	Development Team Avg. Score
Contacts (including meetings)	5	124	170	137.37	10.75	8.03	15.35
Qualifications	4	6	19	316.67	22.00	27.40	25.82
Major Gift Solicitations (\$25K+)	2	5	20	380.95	44.00	31.85	21.47
Major Gift Commitments (\$25K+)	1	4	15	400.00	65.00	28.00	17.13
Deferred Gift Commitments	6	2	2	133.33	3.25	1.83	2.30
Dollars Raised	3	2,812,500	7,537,729	268.01	33.00	36.60	26.15
Total					178.00	133.70	108.22





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What unique/different metrics are your organizations measuring?



What do you wish you could change about your metrics?

Culture, Motivation, and Measurement - Oh My!

EXPLORE
PD25
New Depths

Culture



“You don’t want to go to work in a Hawaiian shirt if you work at a tuxedo organization.”
– RBM



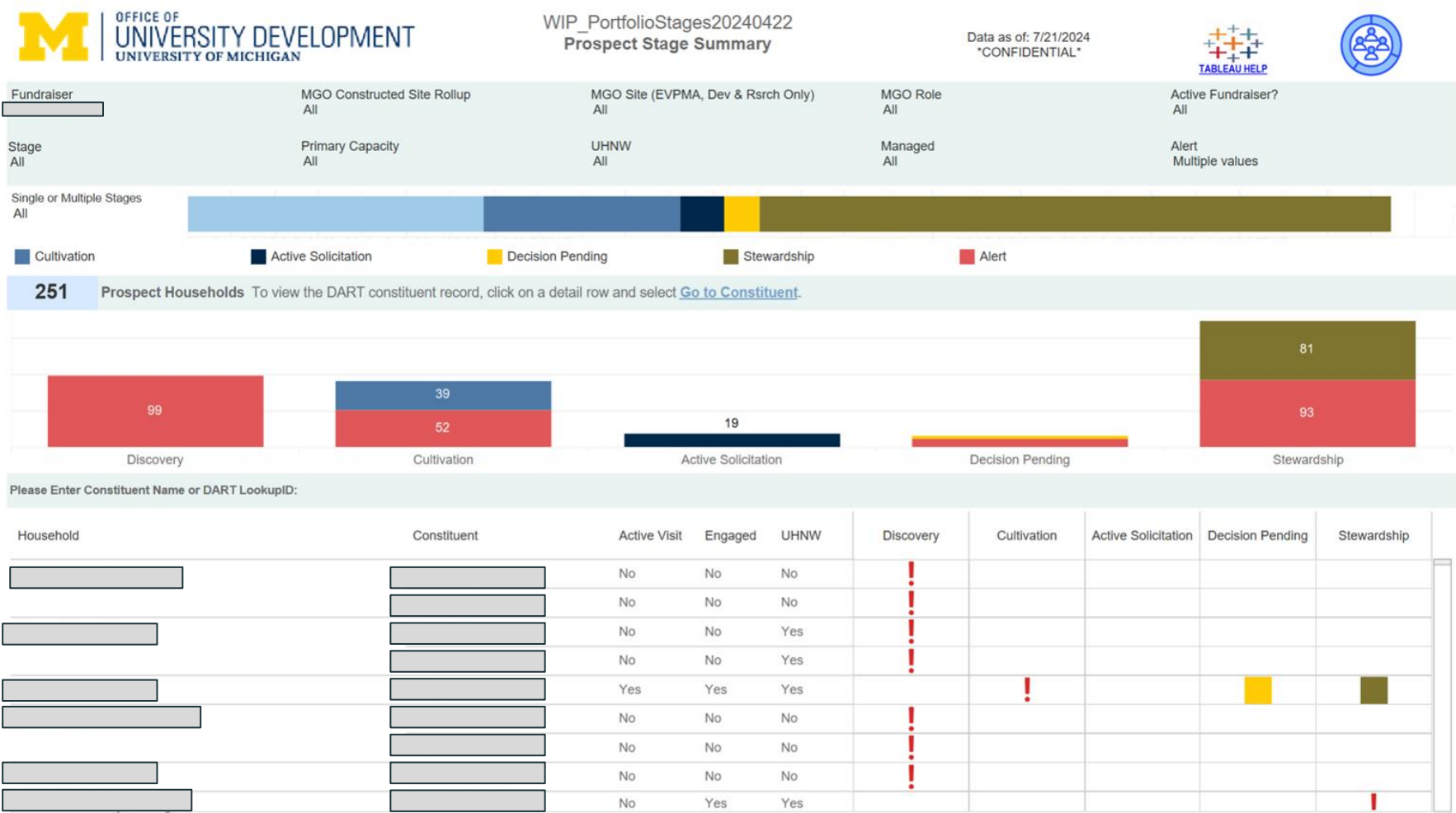
Culture's Impact on Meetings at WFAA

- Intended to encourage frequent travel and face-to-face time with prospects
- “Digital-first” strategies were deployed during the pandemic and development results remained strong
- Discussions about defining what constitutes a “meeting” shined a bright light on data entry
 - People were coding substantive phone conversations and robust emails as a “meeting”
- Eliminated Meetings as a metric all together
- Currently the count of Meetings is significantly lower than the past
 - Is it because people are meeting less?
 - Or is it the same and people are just accurately coding their contact method now that they aren't trying to get credit for meetings?

Motivation



Michigan's New Metrics - Stages and Standards



Michigan's New Metrics - Stages and Standards



WIP_PortfolioStages20240422
Infographic


Data as of: 7/21/2024
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Stage	Alert	Resolution
Discovery Evaluating the major giving capacity/likelihood of a prospect. Entry: Planned, Pending, or Completed Visit or is added as CRM. Expected Duration: 12 months.	No Visit <ul style="list-style-type: none"> 120 Days 180 Days 270 Days 365 Days 	<ul style="list-style-type: none"> Visit Prospect Remove From CRM List Prospect Tagged Not a Prospect
Cultivation Exploring and matching of interests and areas of affinity to funding opportunities. Entry: Prospect is assigned to the portfolio or added as a team member to a plan. Expected Duration: 24 months.	Unengaged Plan <ul style="list-style-type: none"> 90 Days 120 Days 180 Days 365 Days 	<ul style="list-style-type: none"> Add Plan Updated Existing Plan Add Ask to a Plan Remove from Portfolio End-date Plan Role
Active Solicitation Funding interests, ask amounts and timing are developed. Entry: Unqualified or Qualified Ask with a future date is entered. Expected Duration: 6 months.	Un/Qualified Ask <ul style="list-style-type: none"> Expected Date > Today Expected Date > 30/60 Days No Expected Ask Date No Expected Ask Amount 	<ul style="list-style-type: none"> Update Ask Status Update Ask Date Add Ask Amount
Decision Pending Prospect's decision is pending related to a documented ask. Entry: Unqualified or Qualified Ask changes status to Response Pending. Expected Duration: 6 months.	Ask Response Date <ul style="list-style-type: none"> > Today > 30/60 Days No Expected Ask Date No Expected Ask Amount 	<ul style="list-style-type: none"> Update Ask Status Update Ask Date Add Ask Amount
Stewardship Donor is actively stewarded by fundraiser and or stewardship resources. Entry: Response Pending Ask changes status to Accepted. Expected Duration: 24+ months.	Unengaged Plan <ul style="list-style-type: none"> No Plan associated with Accepted Ask for more than 365 days 	<ul style="list-style-type: none"> Add Stewardship Plan Updated Existing Plan Remove from Portfolio



Michigan's New Metrics - Stages and Standards

 Fundraiser Performance Standards			
	Chief Development Officer*	Fundraiser	LAG Officer
Yearly Minimum Acceptable Standard			
Discovery Visits	5	15	50
Visits on a plan	50	85	50
Portfolio Engagement	75%		
Accepted Asks OR Dollars Raised	5 or 10X your unit's minimum Major Gift amount	10 or 10X your unit's minimum Major Gift amount	10 or 10X your unit's minimum LAG gift amount
Open or Rejected Opportunities <small>Includes Team roles</small>	10	15	10
Stewardship Visits <small>May also count for "Visits on a Plan"</small>	10	8	N/A
Recommended Maximum Portfolio Size:	60 households	80 households	120 households
+Additional Success Measures Data shows that Michigan's top fundraisers meet or exceed the following targets. Use these measures to help guide your success.			
Disqualification <small>Constituents tagged "Not a Major Gift Prospect"</small>	2	5	20
Strategy Session <small>Hosted or Attended</small>	10	5	N/A
Plans with a Planned or Pending Step <small>Step must have a date in the future</small>	75%		
Planned Gift Opportunities <small>Response Pending, Accepted or Rejected</small>	1	2	N/A

*Additional Responsibilities: Progress toward SCCU Campaign goal, Overall team engagement score

Motivating Factors on Metrics

Leadership Changes

- A Vice President preparing to launch his first VCU campaign + new senior fundraising leadership
- New WFAA Development Leadership Structure as of January 2024

Accountability & Data Usability

- VCU launches a metrics system that holds fundraisers accountable to ambitious fundraising goals.
- WFAA creates the Decision Support team and moves Prospect Development to join the Development team

Campaign Readiness

- Ensure that fundraisers are pushing the upper limits of what is feasible for the life cycle of the upcoming campaign.
- WFAA Metrics Attainment Review helping to suggest changes to credit structure, aiming to maximize the fundraisers we have before increasing headcount

Measuring Wisconsin's Metrics

	Metric Priority					
% Goal Attainment	1	2	3	4	5	6
0% (No Activity)	0	0	0	0	0	0
1-9% of Goal	5	4	3	2	1	0.125
10-19% of Goal	8	6	4.5	3	1.75	0.25
20-29% of Goal	11	8	6	4	2.5	0.5
30-39% of Goal	14	10	7.5	5	3.25	0.75
40-49% of Goal	17	12	9	6	4	1
50-59% of Goal	20	14	10.5	7	4.75	1.25
60-69% of Goal	23	16	12			
70-79% of Goal	26	18	13.5			
80-89% of Goal	29	20	15			
90-99% of Goal	32	22	16.5			
100-109% of Goal	35	24	18			
110-119% of Goal	38	26	19.5			
120-129% of Goal	41	28	21			
130-139% of Goal	44	30	22.5			
140-149% of Goal	47	32	24			
150-159% of Goal	50	34	25.5			
160-169% of Goal	53	36	27			
170-179% of Goal	56	38	28.5			
180-189% of Goal	59	40	30			
190-199% of Goal	62	42	31.5			
200%+ of Goal	65	44	33			

The Scorecard

Score Card	Number of Major Commitments	Number of Solicitations	Dollars Raised	Number of Qualifications	Visits	TOTALS
200% or more of Goal	91	50	36	13	10	200
175-199% of Goal	80	47	34	12	9	182
150-174% of Goal	71	40	29	11	8	159
125-149% of Goal	62	34	25	10	7	138
101-124% of Goal	53	28	20	9	6	116
100% (Achieve Goal)	44	25	18	8	5	100
75-99% of Goal	36	22	16	7	4	85
50-74% of Goal	27	16	11	5	3	62
25-49% of Goal	18	9	7	2	2	38
1-24% of Goal	10	3	2	1	1	17
0% (No Activity)	0	0	0	0	0	0

Adjusting What and How We Measure

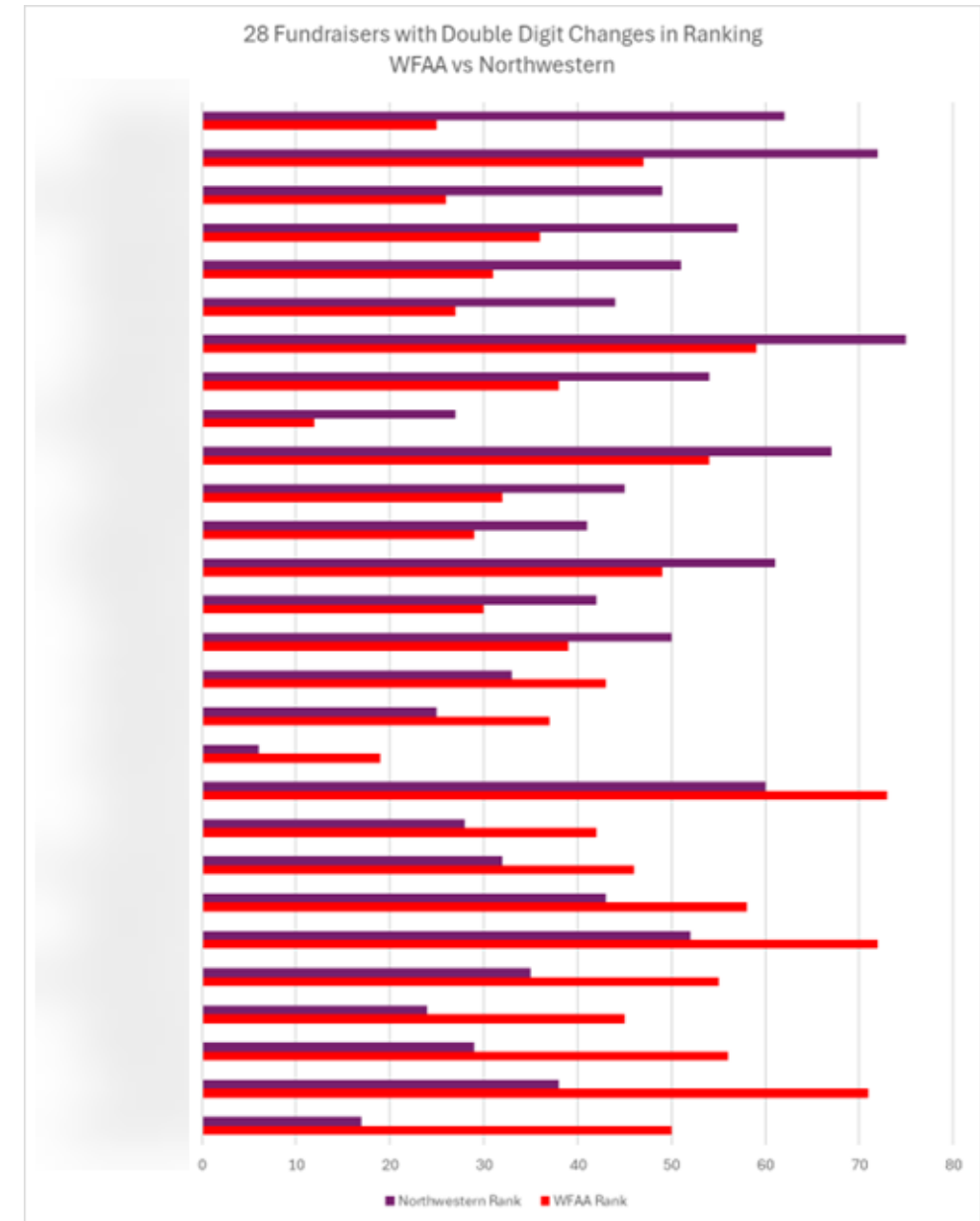
Average Performance 2020 - 2024											
Excludes First and Last Year / 100% Appointment Only / Excludes											
DoD Role Group	Metric	Average DoD Count (4 Years)	Average 4-Year Goal	% Met Goal	Average	Median	Max Value	Min Value	Yes Met Goal Count	No Met Goal Count	
02-VP Dev (Yes)	17-Unique Prospects Engaged	2.8	55	45%	62	49	116	18	5	6	
08-AVP Dev (Yes)	09-New Major Gift Donor	3.5	3	36%	3	2	14	-	5	9	
08-AVP Dev (Yes)	10-\$50K+ Commitments	3.5	9	57%	10	9	25	2	8	6	
08-AVP Dev (Yes)	11-\$100K+ Commitments	3.5	9	43%	8	8	19	-	6	8	
08-AVP Dev (Yes)	12-\$50K+ Solicitations	3.5	12	57%	16	13	31	8	8	6	
08-AVP Dev (Yes)	13-\$100K+ Solicitations	3.5	12	29%	8	8	19	-	4	10	
08-AVP Dev (Yes)	14-\$5M+ Solicitations	3.5	1	64%	1	1	4	-	9	5	
08-AVP Dev (Yes)	15-Opportunity Owner Commitments	3.5	9	50%	12	9	33	2	7	7	
08-AVP Dev (Yes)	16-Opportunity Owner Dollars	3.5	3,500,000	50%	5,457,468	4,198,495	20,290,000	110,000	7	7	
08-AVP Dev (Yes)	17-Unique Prospects Engaged	3.5	55	79%	90	67	196	42	11	3	
12-Senior DoD (Yes)	09-New Major Gift Donor	5.8	3	74%	5	4	16	-	17	6	
12-Senior DoD (Yes)	10-\$50K+ Commitments	5.8	12	57%	14	16	33	4	13	10	
12-Senior DoD (Yes)	11-\$100K+ Commitments	5.8	12	22%	9	8	21	2	5	18	
12-Senior DoD (Yes)	12-\$50K+ Solicitations	5.8	17	65%	21	25	48	8	15	8	
12-Senior DoD (Yes)	13-\$100K+ Solicitations	5.8	17	13%	9	8	21	2	3	20	
12-Senior DoD (Yes)	14-\$5M+ Solicitations	5.8	1	39%	1	-	4	-	9	14	
12-Senior DoD (Yes)	15-Opportunity Owner Commitments	5.8	12	70%	17	19	39	5	16	7	
12-Senior DoD (Yes)	16-Opportunity Owner Dollars	5.8	2,750,000	52%	6,841,760	3,331,364	44,569,060	449,718	12	11	
12-Senior DoD (Yes)	17-Unique Prospects Engaged	5.8	62	100%	128	126	222	62	23	0	
13-Senior DoD (No)	09-New Major Gift Donor	15.5	3	73%	4	4	13	-	45	17	
13-Senior DoD (No)	10-\$50K+ Commitments	15.5	16	10%	8	8	19	1	6	56	
13-Senior DoD (No)	11-\$100K+ Commitments	15.5	16	0%	5	5	13	1	0	62	
13-Senior DoD (No)	12-\$50K+ Solicitations	15.5	22	15%	14	13	45	3	9	53	
13-Senior DoD (No)	13-\$100K+ Solicitations	15.5	22	0%	5	5	13	1	0	62	
13-Senior DoD (No)	14-\$5M+ Solicitations	15.5	1	37%	1	-	3	-	23	39	
13-Senior DoD (No)	15-Opportunity Owner Commitments	15.5	16	16%	10	9	20	2	10	52	
13-Senior DoD (No)	16-Opportunity Owner Dollars	15.5	3,000,000	29%	3,308,994	1,672,310	25,760,088	150,000	18	44	
13-Senior DoD (No)	17-Unique Prospects Engaged	15.5	76	84%	168	133	497	34	52	10	
16-DoD (No)	09-New Major Gift Donor	19.0	3	71%	4	4	17	-	54	22	
16-DoD (No)	10-\$50K+ Commitments	19.0	10	36%	9	8	43	1	27	49	
16-DoD (No)	11-\$100K+ Commitments	19.0	10	12%	5	6	17	-	9	67	
16-DoD (No)	12-\$50K+ Solicitations	19.0	20	21%	14	14	58	1	16	60	
16-DoD (No)	13-\$100K+ Solicitations	19.0	20	0%	5	6	17	-	0	76	
16-DoD (No)	14-\$5M+ Solicitations	19.0	1	16%	0	-	2	-	12	64	



Trying on Peer Models

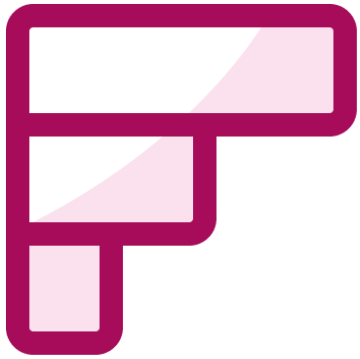


- 51 fundraisers had a single digit change in ranking.
- 28 had a 10+ change in ranking.



Measurement

culture +/- motivation +/- measurement = success?



As you think about your organization, which of these feels like the most important metrics detail?

Essentials to Getting Buy-In

- Partnership with Leadership
- Persistence
- Flexibility
- Managers

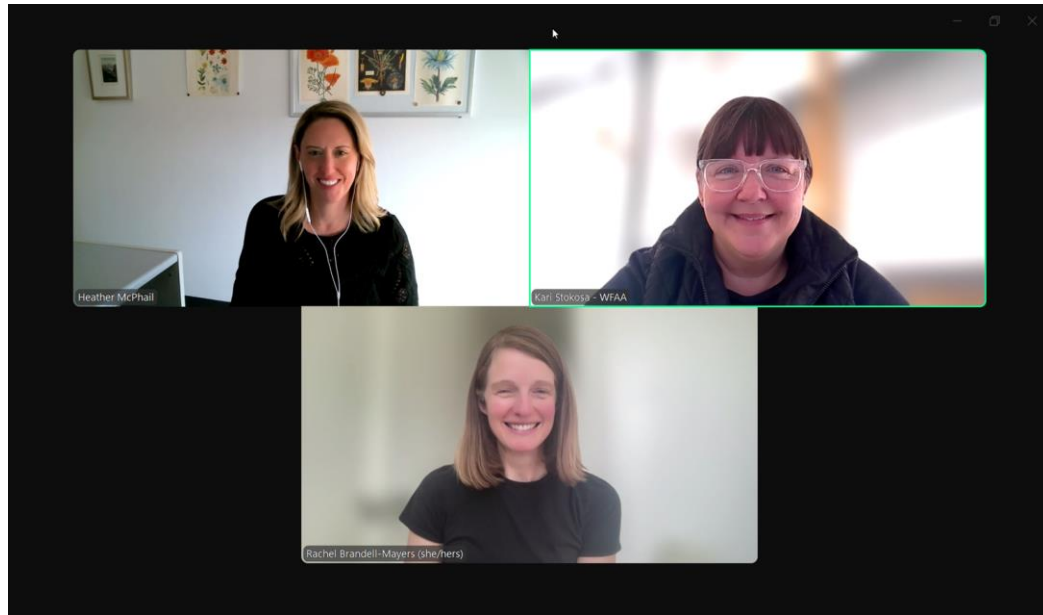


Wrap-Up

Metrics will never do what we want them to when they are the be all and end all of fundraiser performance. They are an important part of a package.

- Organizational Culture and History
- Motivations
- Measurements
- Getting Buy-In = Moving at the Speed of Trust
- Build Relationships - Don't be Strangers!

Questions and How to Find Us



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Thank you to Tim Fortescue at [40Watt Coaching](#) for your advice and guidance on our presentation

THANK YOU!

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