

## Metrics in Major Gift Fundraising

### Why do you want to measure?

- Analysis of donor pool
- Staff performance and progress against a clear and measurable standard
- Routine and thoughtful feedback to staff with a focus on performance
- Compensation and possible bonuses for meeting targets
- Assessment of workload and productivity
- Prioritization of how time is spent
- Appropriateness of organizational expectations
- Fair and accurate reporting to CEO/Board of directors
- Organizational accountability for investment of fundraising resources

### What do you want measure?

- Number of major giving prospects (100 – 150, always shifting)
- Number of contacts with individual donors over a year (tied to “moves management” strategy or other donor progression plan )
- Aggregate number of total contacts for MG fundraiser (40 – 50 per month)
- Number of face-to-face meetings in a reporting period (15 – 30 per month)
- Number of proposals submitted, at what dollar amount, and anticipated date of close (2 – 5 per month using organizational criteria for what constitutes a major gift)
- Number of proposals closed, and at what dollar amount, in a reporting period
- Number of referrals to new donors generated through current prospects
- Number of meetings scheduled with donors for ED or CEO

### How should the goals be set?

- Should be consistent with and supportive of institutional mission, vision, values, and overall fundraising strategy
- Set by supervisor/ED/CEO in consultation with MG fundraiser
- Needs to fit other organizational responsibilities, which most of us have

### What are some concerns?

- Too much focus on acquiring quick closes and letting slide the long term relationship (which can lead to more gifts)
- Too much focus on the numbers and not enough on the quality of the interaction (what is the point in measuring mediocrity?)