

STANDARDS OF PERFORMANCE



Performance Goals for Major Gift and Planned Giving Officers

For professionals who truly aspire to great success in major and planned gifts, it is essential to design and implement a plan and strategy of action that enables you to:

- identify qualified prospects
- make the initial contact
- follow-up as necessary
- secure the gift
- revise it as appropriate to provide stewardship and, if possible, increase the giving.

This process assures the proper nurturing of a donor and puts in place an effective prospect-donor cycle.

You need to develop sources to help you identify and qualify appropriate prospects. This will enable you to maintain an active roster of qualified men and women to work with. The emphasis needs to be on relationship building. This can most effectively be done through the *Moves Management*® system. *Moves Management*® is the name most often used by Development and Advancement offices for a structured donor and prospect relationship building program.

DISCOVERY ... NETWORKING ... CULTIVATION ... RELATIONSHIP BUILDING

In this section of the **SOP**, we provide a standard to enable you to secure and maintain a sufficient number of prospects to produce desired results. This includes seminars you conduct, referrals you expect, and new proposals you intend to make.

SOPs have been established for the number of seminars, prospects discovered, visits made, gifts implemented, and dollar values. These measures are related to the number of years a staff person (counselor) has been working in his or her job and the level of experience. The **SOPs** are listed below. (TBE stands for "To Be Established")

Important: The **SOPs** are for those who are full time in major and planned gifts. If you are not full time, decrease the numbers in appropriate ratio to the amount of time you do owe this area.

SOP CRITERIA					
<u>Prospects Identified</u>	<u>Inadequate</u>	<u>Limited</u>	<u>Effective</u>	<u>Impressive</u>	<u>Excellent</u>
First Year Counselor	<40	40-65	65-100	100-130	130+
Second Year Counselor	<65	65-80	80-100	100-130	130+
Third Year Counselor	<50	50-75	75-100	100-125	125+
Fourth Year Counselor	<50	50-75	75-100	100-125	125+
Fifth Year Counselor and beyond	<50	50-75	75-100	100-115	115+
<u>Visits with Prospects and(Center of Influence)</u>	<u>Inadequate</u>	<u>Limited</u>	<u>Effective</u>	<u>Impressive</u>	<u>Excellent</u>
First Year Counselor	<25	35	40	50	60+
Second Year Counselor	<25	35	40	50	60+
Third Year Counselor	<25	40	50	60	75+
Fourth Year Counselor	<25	40	50	60	75+
Fifth Year Counselor and beyond	<25	50	60	75	85+

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<u>Stewardship Visits</u>	<u>Inadequate</u>	<u>Limited</u>	<u>Effective</u>	<u>Impressive</u>	<u>Excellent</u>
First Year Counselor	<10	10-20	20-25	25-30	30+
Second Year Counselor	<10	10-20	20-25	25-30	30+
Third Year Counselor	<10	10-20	20-25	25-30	30+
Fourth Year Counselor	<5	5-10	10-15	15-20	20+
Fifth Year Counselor and beyond	<5	5-10	10-15	15-20	20+

<u>Seminars</u>	<u>Inadequate</u>	<u>Limited</u>	<u>Effective</u>	<u>Impressive</u>	<u>Excellent</u>
First Year Counselor	<2	3	4	5	6
Second Year Counselor	<2	3	4	5	6
Third Year Counselor	<2	4	5	6	7
Fourth Year Counselor	<2	4	5	6	7
Fifth Year Counselor and beyond	TBE	TBE	TBE	TBE	TBE

INSTRUMENTS ... OUTCOMES ... PRODUCTION

SOP CRITERIA					
<u>Number of Gifts</u>	<u>Inadequate</u>	<u>Limited</u>	<u>Effective</u>	<u>Impressive</u>	<u>Excellent</u>
First Year Counselor	<2	2-3	4-5	6-7	8+
Second Year Counselor	<3	3-4	5-7	8	9+
Third Year Counselor	<4	4-5	6-8	9	10+
Fourth Year Counselor	<5	5-6	7-9	10	11+
Fifth Year Counselor and beyond	<6	6-7	8-10	11	12+

<u>Dollar Values</u>	<u>Inadequate</u>	<u>Limited</u>	<u>Effective</u>	<u>Impressive</u>	<u>Excellent</u>
First Year Counselor	<.2	.2-.4	.4-1	1-1.75	1.75+
Second Year Counselor	<.4	.4-.6	.6-1.5	1.5-2	2+
Third Year Counselor	<1	1-1.4	1-2	2-3	3+
Fourth Year Counselor	<1.2	1.2-1.75	1.75-2.5	2.5-3.5	3.5+
Fifth Year Counselor and beyond	<1.5	1.5-2	2-3	3-4	4+

These **Standards Of Performance (SOP)** have been reviewed by a Panel of the *Board of Visitors* of The Institute for Charitable Giving. They have been approved as being acceptable goals to assure a successful program. Obviously, every institution and its constituencies are different and the goals should be designed to fit your specific circumstance. Every situation presents its own set of conditions, obstacles, and opportunities. The important factor is that you establish agreed-upon monthly and annual goals, and that they are measured and evaluated on a regular basis.

Your *Standards of Performance* for a Twelve Month Period

Month	Number of Calls Per Week		Asks Made or Proposals Delivered for the Month		Number of Gifts Secured for the Month		Dollars Secured During the Month	
	*	Actual	*	Actual	*	Actual	*	Actual
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								

Indicates your objective—the number you and your supervisor agree on. Don't over-reach. Be realistic. But aim high enough to make you stand on tip toes. Use the *Standards of Performance* as a guide.

Because the months are numbered rather than specific—you can begin the tracking any time during the year.

It is important that you establish objectives for each month, and that the results are reviewed with your supervisor as close as possible following the end of the period.