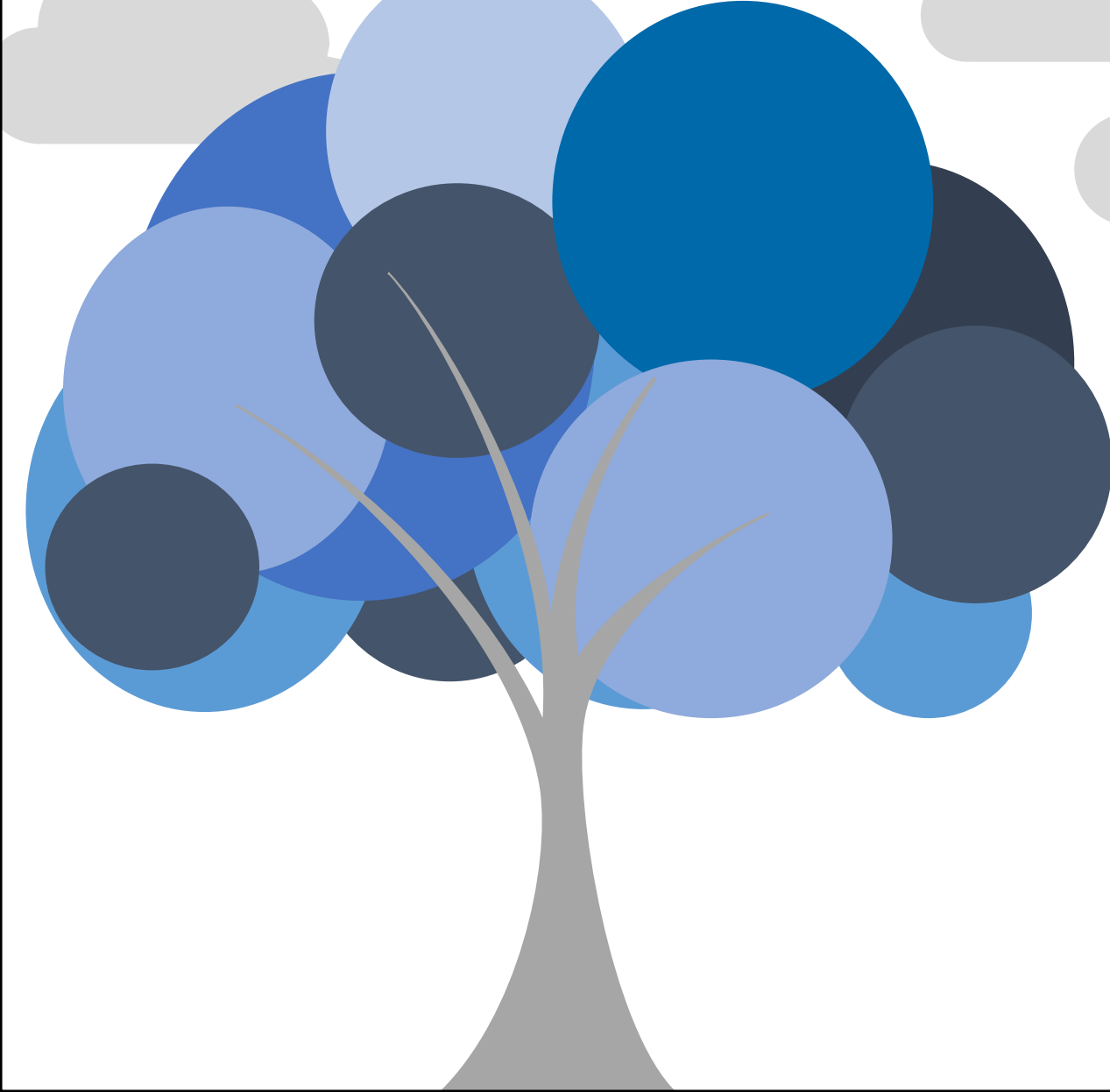


WHAT IS YOUR STAFF'S DONOR CAPACITY?



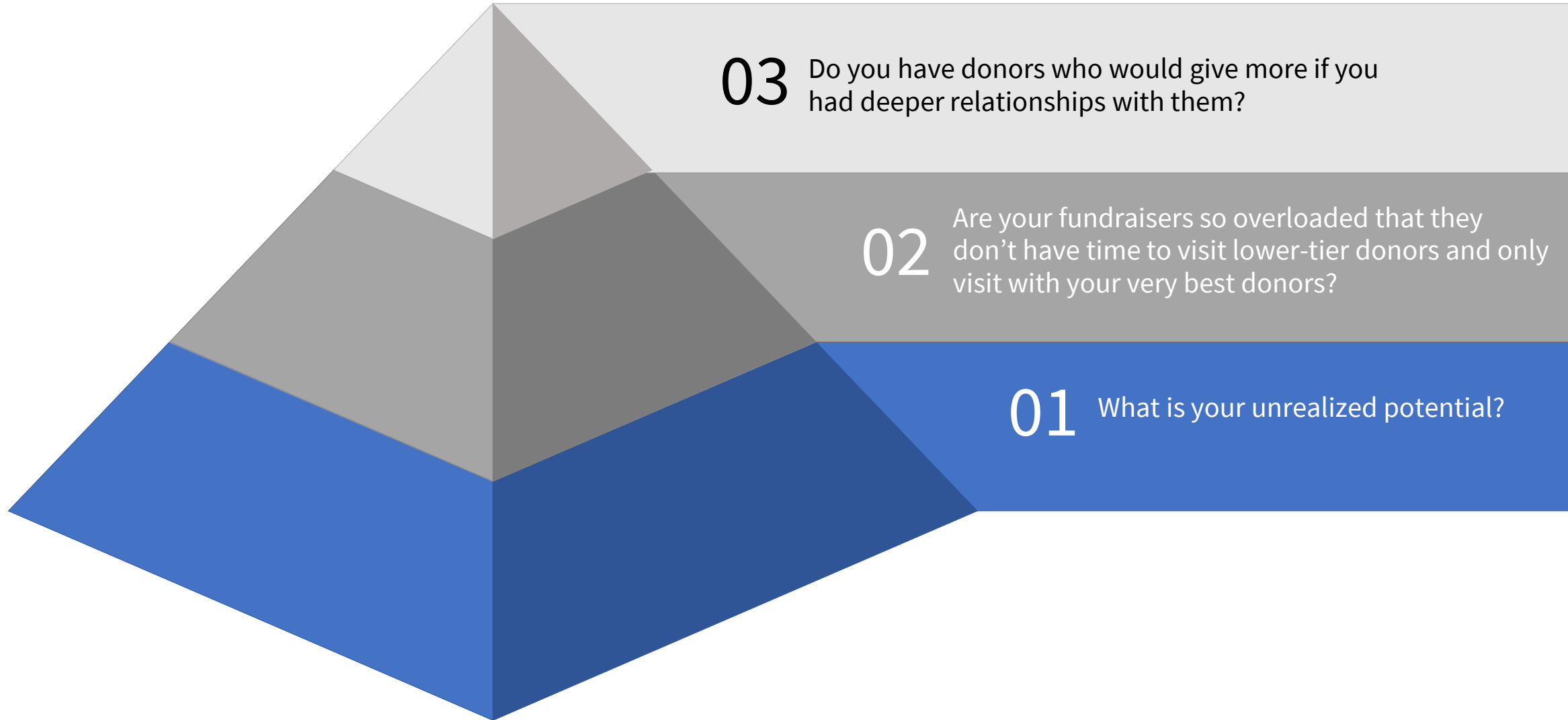
01

How many donors do you have at the annual and major gift level?

02

Do you have enough staff to steward your donors at a proactive level?

HOW MANY GIFTS ARE YOU LEAVING ON THE TABLE?



STAGING STAFF FOR SUCCESS

Do you have a plan to stage the hiring in order to be successful?



The very best organizations hire the right person at the right time.



They hire when additional staff is needed to move the organization to the next level.



They are proactive rather than reactive.



They plan for growth just as any successful for-profit company would to move forward.

FINANCIAL PRO-FORMA: ANNUAL GIFT OFFICER

Goals for each Gift Officer:

Goal 01

To move 10% of their donors up to Major Gift Donor status per year.

Goal 02

Replace the number of donors who have moved up to Major Gift Donor status with new Annual Gift Donors.

Goal 03

Increase the amount their donors give by 15% over the prior year.

ANNUAL GIFT OFFICER

\$ 40,000 Salary

\$ 25,000 Related expenses

\$ 100 Minimum annual gift to be considered an Annual Gift Donor

500 Number of donors each Annual Gift Officer "owns" (caseload)

\$ 175,000 Amount raised last year from caseload

15% Desired % increase from previous year

Year	\$ Increase	Avg Increase	Annual Goal	AGO Net	Total Gross	Total Net
2013	-	-	\$ 175,000	\$ 110,000	\$ 175,000	\$ 110,000
2014	\$ 26,250	\$ 52.50	\$ 201,250	\$ 136,250	\$ 201,250	\$ 136,250
2015	\$ 30,188	\$ 60.38	\$ 231,438	\$ 166,438	\$ 231,438	\$ 166,438
2016	\$ 34,716	\$ 69.43	\$ 266,153	\$ 201,153	\$ 266,153	\$ 201,153
2017	\$ 39,923	\$ 79.85	\$ 306,076	\$ 241,076	\$ 306,076	\$ 241,076
2018	\$ 45,911	\$ 91.82	\$ 351,988	\$ 286,988	\$ 351,988	\$ 286,988

 **\$200,000**

MAJOR GIFT OFFICER

- \$ **81,000** Salary
- \$ **25,000** Related expenses
- \$ **5,000** Minimum annual gift to be considered a Major Gift Donor
- 170** Donor caseload
- \$ **400,000** Dollar goal in first year
- 15%** Desired % increase from previous year

Year	\$ Increase	Avg Increase	Annual Goal	MGO Net
2014	-	-	\$ 400,000	\$ 294,000
2015	\$ -	\$ -	\$ 400,000	\$ 294,000
2016	\$ -	\$ -	\$ 400,000	\$ 294,000
2017	\$ 60,000	\$ 352.94	\$ 460,000	\$ 354,000
2018	\$ 69,000	\$ 405.88	\$ 529,000	\$ 423,000
2019	\$ 79,350	\$ 466.76	\$ 608,350	\$ 502,350

 **\$350,000**

THE NEW 80/20 RULE

	80% of total	85%	90%	95%
Study Average	5.6%	8.5%	13.7%	25.5%
Year				
2016	1.9%	3.2%	6.3%	15.0%
2015	1.5%	2.6%	5.4%	13.3%
2014	1.7%	2.8%	5.7%	13.9%
2013	2.0%	3.3%	6.5%	15.3%
2012	2.8%	4.7%	8.4%	17.9%
2011	1.0%	1.7%	3.7%	9.8%
2010	0.4%	0.7%	1.6%	5.4%
2009	0.7%	1.1%	2.2%	6.3%
2008	1.6%	2.4%	4.2%	10.7%
2007	1.6%	2.8%	5.4%	13.0%

**Actual Data*

What do your fundraising goals look like if you remove your top 50 donors?

What are you doing to engage the other 90-95%?

COMPARING CURRENT STAFF TO DESIRED STAFF

with 3,500 Donors

Gift Officers	Your current Staff	Your current staff (FTE)	Current donor capacity	Desired staff	Shortfall
Major Gifts	7	4.8	844	5.6	0.8
Annual Gifts	2	0.3	141	2.2	1.9
Other (FT, OC, & LP)	0	0	0	3.1	3.1
TOTAL	9	5.1	985	10.9	5.8

WHAT MUST BE DONE TO CHANGE THOSE STATISTICS?

01

Are there gifts being left on the table?

02

What would be the difference if you had a larger staff who spent more of their time in conversations with donors?

03

What if we focused more on increasing net income over ROI?

04

FTE in conversation with donors is the key to increasing dollars!

05

Ask yourself - why don't we make needed changes?

QUESTIONS TO BE ANSWERED

- Do you have a systematic approach?
 - Does each officer have a plan when they show up to work each morning?
 - Do you have a standard of high accountability?
- Do you have the right staff to excel?
- Do you have the right people to succeed?
- Does each person have a job description?
- Are your fundraisers out having conversations with donors or picking out napkins for the next special event?
- Do you have a pro-forma for growing staff?



WHERE DO YOU GO FROM HERE?

- You need a strategic plan for each officer
- You need a strategic plan for each donor over a dollar limit
- You need a system for daily guidance

QUESTIONS?

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