

Sample Gift Planning Dashboard

Deferred Gift Production

	This Period	2020 YTD	2019	2018
1	New irrevocable deferred gifts			
2	Market value of new irrevocable deferred gifts			
3	New revocable deferred gifts			
4	Market value of new revocable deferred gifts			
5	Number of new non-cash outright gifts			
6	Market value of new non-cash outright gifts			
7	Market value of distributions from matured deferred gifts			

Contact Report

	This Period	2020 YTD	2019	2018
8	Number of face to face/video visits with donors/prospects			
9	Number of substantive contacts with donors/prospects			
10	Number of face to face/video visits with professional advisors			
11	Number of substantive contacts with professional advisors			
12	Number of Proposals for blended or deferred gifts			
13	Dollar value of proposals for blended or deferred gifts			

Key Stats

	2020	2019	2018	
14	Stick Rate (Retention Rate) for Legacy Donors			
15	Known/Unknown Rate for Matured Gifts			
16	Number of Members of Legacy Society			
17	Value of Legacy Society Commitments			
18	% of Board Members with Legacy Gifts			

Opportunity

	This Period	2020 YTD	2019	2018
19	Number of Tier I prospects in data system			
20	Number of Tier II prospects in data system			
21	Number of responses to marketing campaigns			
22	Number of attendees at events			

See the presenter's notes for definitions of the fields.
 Add charts/graphic showing three year trends for key fields.
 Add any additional key fields appropriate for your institution.

- 1 These gifts include charitable gift annuities, charitable remainder trusts, and charitable lead trusts.
- 2 Use the current market value of gifts on date of completion.
- 3 These gifts include revocable deferred gifts such as bequests, bequest substitutes in trusts, beneficiary designations of life insurance and IRAs.
- 4 Use donor-reported values, or where there is not a donor-reported value use the 5-year matured gift average.
- 5 Non-cash gifts include publicly traded stock, privately traded stock, real estate, life insurance policies, and tangible personal property.
- 6 Use values reported on 990.
- 7 Use values reported on 990.
- 8 Face to face/video meetings are intentional, face to

face meeting with a donor/prospect for discovery, cultivation or stewardship that advances the donor relationship; not a casual encounter at an event or group meeting.

9 Substantive contacts are intentional, meaningful call, e-mail, or text with a donor/prospect for discovery, cultivation, solicitation, or stewardship that advances the donor relationship. These do not include mail or e-mail communications sent to all donors or to a segment of donors.

10 Face to face/video visits are intentional meeting with an advisor in which the advisor shares information about a donor to the organization and asks questions related to the creation or completion of a gift, or in which the nonprofit shares information with the advisor about the organization and encourages the advisor to visit or call if they have questions that would help them serve their clients more effectively.

11 Substantive contacts are an intentional call, email, or text with an advisor in which the advisor shares information about a donor to the organization and asks questions related to the creation or completion of a gift, or in which the nonprofit share information with the advisor about the organization and encourages the advisor to visit or call if they have questions that would help them serve their clients more effectively.

12 This is a count of proposals for blended and deferred gifts.

13 This is the dollar value of proposals for blended and deferred gifts.

14 The stick rate/retention rate is calculated by determining the percentage of legacy society members in the prior year who died who left a gift to Children's.

15 The known to unknown rate is calculated by determining the percentage of all new deferred gift donors in the prior year who

died and left a gift to Children's who were a member of the legacy society (known).

16 Count of confirmed members of legacy society who have notified the nonprofit- preferably in writing - they have left a deferred gift to Children's

17 Market value of legacy society commitments; use donor reported values, and where none is offered use 5-year deferred gift average.

18 This is generally the percentage of current nonprofit governing board members who have confirmed they have put a deferred gift in place.

19 Tier I prospects are those who are ready for the planned gift conversation and have been marked in the data system.

20 Tier II prospects are those who are being moved to readiness to have a planned gift conversation and have been marked in the data system.

21 Number of responses to marketing campaigns for the period and year to date.

22 Number of attendees at events for the period and year to date.