



Smart organizations measure more than dollars raised to evaluate their major gift programs. There are a number of leading indicators which will help you and your board know you are on the right track to raise major gifts.

Sample Metrics Chart

You can use this chart on a monthly or annual basis. Select a high and low goal for each category and compare with last year's actual numbers.

	A	B	C	D	E	F	G	H	I	J
	Total Dollars Solicited <i>(How much you are asking for)</i>	Total Dollars Raised* <i>(Received)</i>	Number of Asks <i>(Gifts Requested)</i>	Number of Gifts Received	Retention Rate	Acquisition <i>(new donors)</i>	Meaningful Visits	Phone Calls <i>(Leaving Messages Count)</i>	Gift Size <i>(Average minus outliers)</i>	Stewardship Efforts
Last Year <i>(Actual)</i>										
Low Goal										
High Goal										
This Year										

*Dollars raised is not always the best indicator of whether your major gift program is working, and yet it is the most common metric used by boards to evaluate major gift programs and development staff members. Although it's not the best indicator, it's still an important one to include.

Major gift success is, in large part, about **consistency**. Small actions, every week add up to big success.

- ✓ 1 phone call per day = 250 phone calls to donors each year
- ✓ 2 visits per month = 24 visit per year
- ✓ 2 hours per week = 100 hours spent on major gifts every year

Why Each Metric Matters

Columns A and B

Compare columns A and B with one another. This looks at how much you asked for versus how much you raised. If you asked for a total of \$100,000 in major gifts (doesn't matter whether it is from one donor or from 10) and you received \$100,000, then you are being too conservative. You are not asking enough people or for enough money. You are playing it safe and only asking those you are sure will give. On the other hand, if you ask for \$100,000 and only receive \$10,000, you are being too aggressive, and asking too soon and for too much.

Columns C and D

Compare columns C and D with one another. If you're asking for 10 gifts, and receive all 10, you know you are playing it safe. If you ask for 10 and only receive 1, you are being too aggressive.

It's important to look at ask amounts (columns A and B) as well as number of asks (columns C and D) because alone, neither gives you the complete picture.

Column E

Retention rate tells you how many donors you are keeping year over year. For right now, look at donor retention for major donors only. That figure should be significantly higher than the donor retention rate of your overall fundraising program.

Column F

Acquisition tells you if you are adding new major donors to your donor pool each year.

Column G

Meaningful visits measures when you have an appointment with someone and sit down to discuss their interests, hopes and dreams. It's not about when you bump into them at the grocery store, or even have a brief conversation at your gala.

Column H

Phone calls are well worth tracking, too. It's important to continually be in touch with donors, whether it's to schedule a visit, invite them for a tour or to volunteer, provide an update, check-in, or simply say "thank you".

Column I

Gift size – it's essential to know if overall major gifts are going up or down. Is the average gift (minus outliers) going up? Don't let an unusually large gift skew the numbers. You may want to look at median and mode as well.

Column J

It's also important to measure your stewardship efforts – how and how often you thank your donors, as well as let them know how their money was used. This is a leading indicator of future gifts, because if you're not thanking your donors and they don't know how their gift was used, it's unlikely they'll make future gifts. Count all meaningful and personal stewardship efforts – actions like a thank you call from a board member, a handwritten note from the executive director, and taking a donor to lunch to let them know the impact their gift made.



When it comes to metrics, it's important not to measure "vanity" metrics, such as friends and followers. It doesn't matter if you have a million friends and followers if they never take action or give.

Other Indicators of Success

It's also a good idea measure less tangible, but equally important indicators of success. Survey and interview your donors with questions and statements, like those shown in the following sample survey:

1 = Not at all 2 = Some 3 = Neutral/content 4 = Happy 5 = Thrilled/Absolutely!

<i>I care passionately about the work of XYZ charity.</i>	1	2	3	4	5
<i>How satisfied do you feel as a donor?</i>	1	2	3	4	5
<i>How engaged do you feel?</i>	1	2	3	4	5
<i>I trust the executive team to use my donation as intended.</i>	1	2	3	4	5
<i>I trust the executive team to be open and transparent.</i>	1	2	3	4	5
<i>Organization XYZ's mission is something I care passionately about.</i>	1	2	3	4	5