


Measuring Departmental Effectiveness

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Discussion

1. Why measure planned giving?
 2. How to measure planned giving?
 3. Summary
- 



Why measure planned giving?

- ▶ “To attempt a quantitative assessment of the performance of a planned giving officer is, as far as I'm concerned, a fool's errand.”
 - ▶ Anonymous retired vice president for development at a large national charity



Why measure planned giving?


- ▶ “In God we trust; all others bring data.”
 - ▶ W Edwards Deming



National Association of Charitable Gift Planners

- ▶ **Task Force on Metrics for Planned Gift Fundraising**

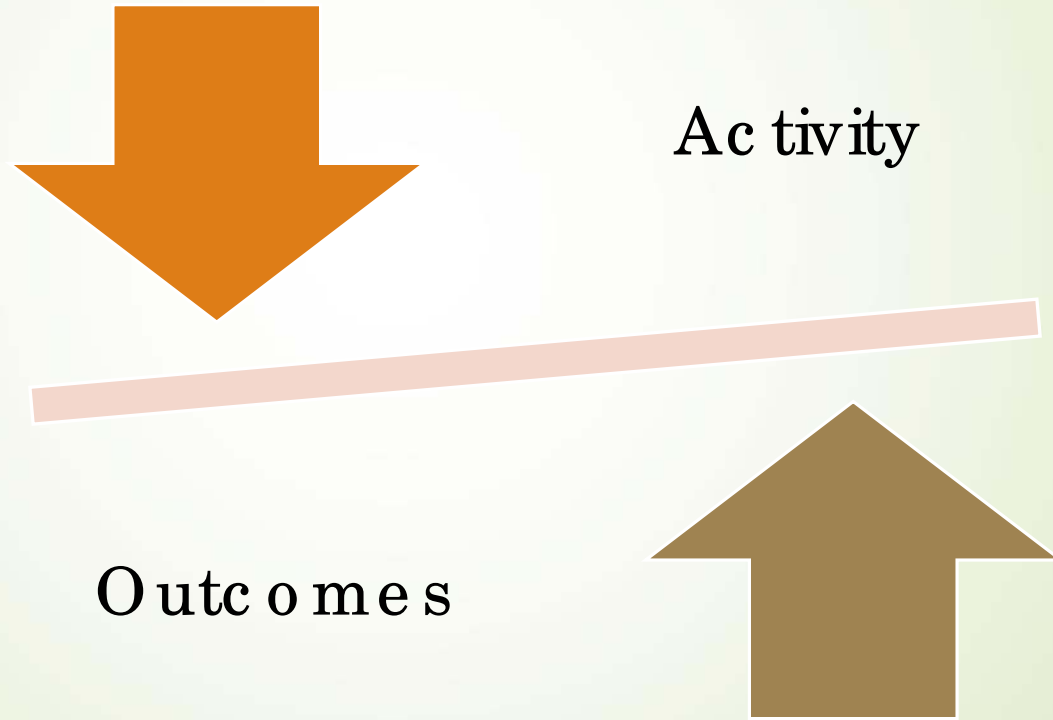
- ▶ “The goal of the Metrics Task Force is to establish a clear understanding of the value that gift planning—and planned gifts—brings to the overall fundraising enterprise. The objective, in particular, is to suggest methods whereby quantitative and qualitative measures can be defined and understood by both those within and outside the fundraising community.”



A planned giving program brings value because:

- ▶ Planned gifts are usually larger than annual gifts.
- ▶ A productive planned gift pipeline helps organizations weather economic downturns.
- ▶ A personalized gift planning experience can strengthen a donor's commitment to the organization and increase future giving.
- ▶ Since most wealth in America is held in noncash assets, planned giving allows donors to make more significant gifts using noncash assets.
- ▶ For fundraisers, gift planning offers the opportunity to move beyond transactional "asks" to more long-term relationships.

Align planned giving activity
with planned giving outcomes



Guidelines for Reporting and Counting Charitable Gifts



Outright



Irrevocable



Revocable



Accounting vs Counting

Accounting	Counting
Valuation	Crediting
Governmental agencies	Do not based
GAAP	Internal policies



Importance of Counting Guidelines

1. Allow counting of **ALL** gifts
2. Ability to report **CLEARLY** results of fundraising activities
3. Establish a method of **COMPARABILITY** among nonprofits
4. Acknowledge the perspective of the **DONOR**

Who cares about planned giving activity and outcomes?



Planned
Giving
Officer



Planned
Giving Staff



Philanthropy
Staff



Leadership



Planned Giving Reports

	Individual PGO	Planned Giving Staff	Philanthropy staff	Leadership
Metric s	X		X	
Pipeline Reports	X	X		X
Documented Gifts	X	X	X	
Department Goals		X		X
Campaign Report		X	X	X
ROI				X
Expectancy Report				X

Metric s R e p o r t

Metrics - As of June 30, 2019

Front Line Fundraisers Metrics		Qualifications Completed				ITS Filed				Asks Completed			Pipeline		Gifts Closed				Stewardship Calls		
Team Member	Stage	This Month	YTD ¹	6 mo Goal	12 mo Goal ¹	This Month	YTD ¹	Goal ¹	YTD Close %	This Month	YTD ¹	Goal ¹	Active Pipeline ³	Proposal Value	This Month	YTD ¹	Goal ¹	Stretch Goal	This Month	YTD ¹	Goal ¹
	2	3	30	42	84	0	1	10	180.00%	1	7	7	\$6,000,500	\$4,695,770	\$2,500	\$504,650	\$1,250,000	\$1,250,000	100%	0%	100%
	1				30	1	1	5	200.00%				\$526,002	\$219,000	\$0	\$277,177	\$400,000	\$750,000	100%	0%	100%
	3				36	1	2	25	116.00%				\$28,813,500	\$7,448,500	\$1,001,675	\$4,443,508	\$3,000,000	\$5,000,000	100%	0%	100%
	2				60	0	1	12	141.67%				\$378,000	\$2,378,000	\$100,050	\$1,033,897	\$1,750,000	\$3,000,000	N/A	0%	100%
	2				84	3	2	20	120.00%				\$5,498,502	\$4,821,500	\$101,700			\$3,000,000	100%	0%	100%
	2				84	13	4	6	733.33%				\$3,344,000	\$1,496,500	\$100,429			\$3,500,000	100%	0%	100%
	2				84	1	1	6	200.00%				N/A	\$3,333,500	\$214,200			\$1,500,000	100%	100%	100%
	2				120				%						\$106,295			\$7,000,000			
	2				84				%						\$62,600			\$1,500,000			
	2				60				%						\$110,020			\$3,000,000			
	3	7	66	18	36				%	0	13	12			\$50,000			\$2,500,000			
	2	12	60	42	84				%	0	1	5			\$201,143			\$1,500,000			
	1	8	27	30	90				%	0	1	5			\$7,300	\$46,000	\$2,500,000	\$3,500,000			
	3	0	0	12	24				%	0	11	12			\$22,350	\$25,341,243	\$5,000,000	\$10,000,000			
	3	0	11	18	36				%	0	15	15			\$0	\$34,158,502	\$3,000,000	\$5,000,000			
	2	12	53		66				%	1	18	16			\$311,200	\$10,311,758	\$7,500,000	\$9,500,000			
	1	6	95	60	120	2	15	10	150.00%	1	9	7	\$11,225,001	\$1,597,000	\$12,109	\$800,675	\$750,000	\$1,000,000	100%	95%	100%
	2	3	48	42	84	2	19	6	316.67%	0	14	12	\$977,001	\$1,407,000	\$5,620	\$1,511,430	\$750,000	\$1,500,000	100%	97%	100%
	2	3	38	42	84	0	2	20	10.00%	0	3	12	\$5,875,000	\$3,120,000	\$100,315	\$258,756	\$1,250,000	\$2,000,000	100%	90%	100%
	2	1	23	33	66	3	23	12	191.67%	0	11	5	\$2,000,000	\$13,495,500	\$321,600	\$19,981,194	\$9,000,000	\$11,000,000	100%	98%	100%
	1	3	41	18	36	0	9	3	300.00%	0	4	4	\$1,240,000	\$462,500	\$1,000	\$7,624,525	\$940,000	\$8,000,000	N/A	95%	100%
Totals		121	1,188	663	1,812	59	459	361		298	155	155	\$171,974,955	\$131,474,214	\$2,857,106	\$168,611,914	\$48,340,000	\$87,500,000			
Unique Results²		132	1,016			44	390			11	155		\$100,761,444	\$1,783,591	\$63,763,258	#REF!					

How many prospects did you visit and qualify?

How many prospects are you planning to ask for a gift?

How many asks did you complete?

What is the \$ value of the gifts you're managing?

What gifts have you completed this month and YTD?

Did you complete all your thank you calls?

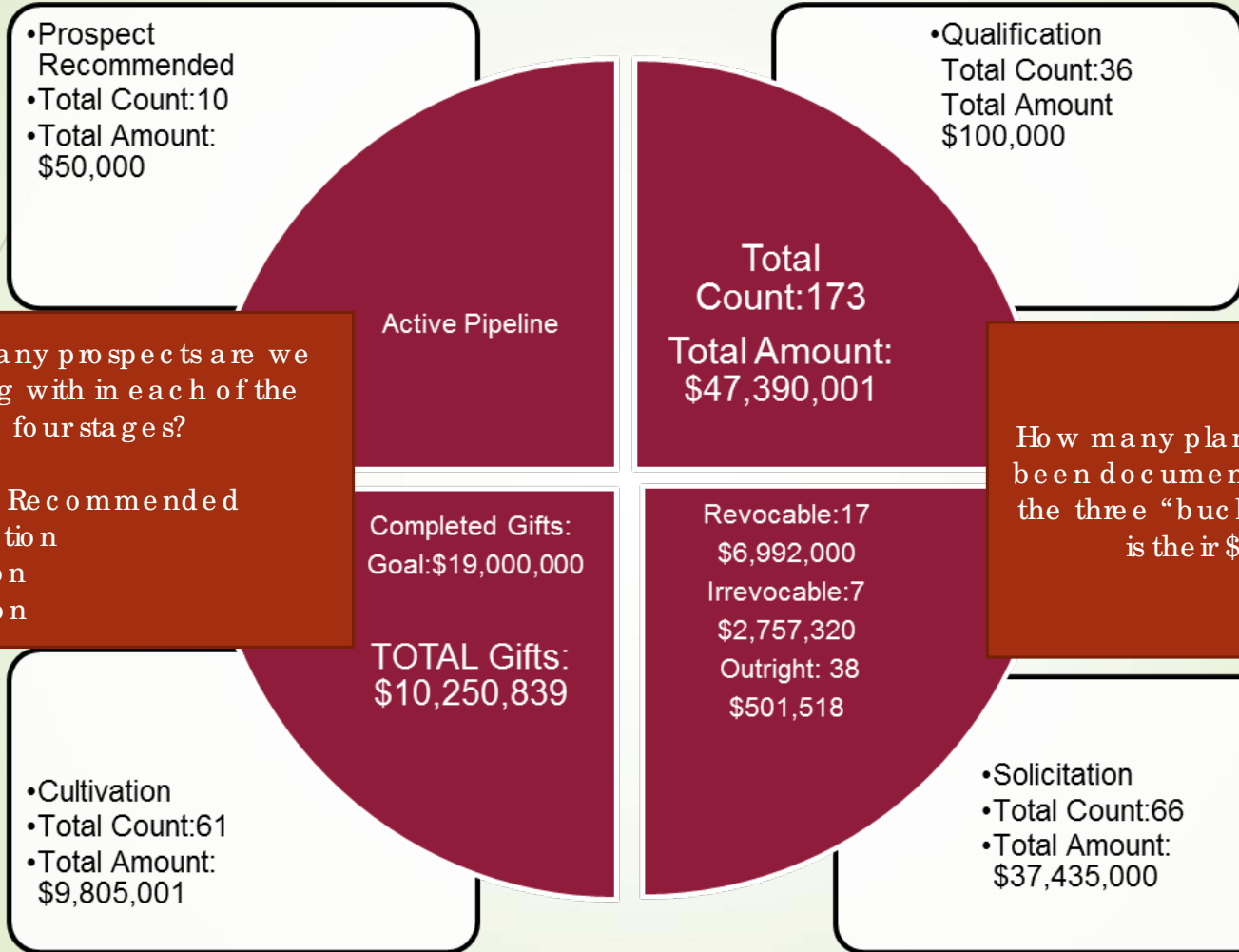
¹September 2018 - August 2019

²To encourage and support integration efforts, multiple FLFs may work on a qualification or gift with each FLF receiving full credit. The Unique Results totals represent the actual number of prospects qualified, ITS forms filed and the total gifts closed.

³Active Pipeline includes prospects and donors in a team member's portfolio where the prospect classification is one of Cultivation or Solicitation.

Planned Giving Pipeline

as of June 30, 2019



How many prospects are we working with in each of the four stages?

Prospect Recommended
Qualification
Cultivation
Solicitation

How many planned gifts have been documented in each of the three “buckets” and what is their \$ value?

Documented Gifts

Planned Giving - Completed Gifts as of 6/30/19

Irrevocable Total: **\$2,757,320.94**

Constituent ID	Name	Gift ID	Gift Vehicle	Gift Revocable?	Gift Date	Fund Specific Attributes	Fund Type	Gift Amount	Solicitor List
2088193		711473	Planned Gift	Irrevocable	5/17/2019	Hospital Expansion	MC--Childrens Hos	\$2,007,320.94	Blaum, Ronald; Payne, Jillian; Zahid, Josh
2045157		716430	Planned Gift	Irrevocable	5/17/2019	Research Discoveries	MC--Ston	\$100,000.00	Miller, Matthew; Day, Lauren; Nafie, John; Mekelburg, Ernest; Blaum, Ronald

Revocable Total: **\$6,992,000.00**

Constituent ID	Name	Gift ID	Gift Vehicle	Gift Revocable?	Gift Date	Fund Specific Attributes	Fund Type	Gift Amount	Solicitor List
45051		708363	Revocable	Revocable					Mekelburg, Ernest
8711703		708191	Revocable	Revocable					Mekelburg, Ernest; Haynal, Julian; Powell, Juliana

Outright Total: **\$501,518.54**

Constituent ID	Name	Gift ID	Gift Vehicle	Gift Revocable?	Gift Date	Fund Specific Attributes	Fund Type	Gift Amount	Solicitor List
8713290		714696	Pledge	Outright	5/31/2019	Scholarships	Univ.--SD	\$7,500.00	Powell, Juliana; Blaum, Ronald
8706757		714109	Cash	Outright	6/14/2019	Hospital Expansion	MC--Other	\$1,000.00	Herrmann, Krystal; Blaum, Ronald

Total: \$10,250,839.48

Identifies the type of gift, the date of the gift, use of the gift, the gift amount and who worked with the donor on the gift.

Details of the gifts in each of the 3 buckets

Planned Giving Department Goals

Loma Linda University Health Planned Giving Goals

	Description	Goal	Actual	Notes
1	<p><i>Produce marketing materials to raise awareness of planned giving across all LLUH entities:</i></p> <p>1) Ads featuring planned giving donors-Scope 2) Ads in other LLUH publications 3) Target mailing pieces a) wills and trusts b) Email survey 4) eNewsletters 5) Donor stories 6) Social Media posts</p>	<p>4 4 1 1 4 4 3</p>	<p>3 5 1 1 2 2 0</p>	
2	<p><i>Qualify, cultivate and solicit prospects as part of the overall Vision 2020 front line fundraiser goals.</i></p> <p>1) Qualifications 2) Intent to Solicits Submitted</p>	120		Todd
3	<p><i>Operate a portfolio management system which integrates planned giving, prospect development and front line fundraisers:</i></p> <p>1) Conduct integrated PD-PG-FLF Strategy Sessions</p>	189	185	Avera
5	<p><i>Conduct planned giving training and awareness sessions for interested individuals:</i></p> <p>1) Philanthropy staff (# of hours) 2) LLUH Faculty/Staff (# of sessions) 3) Allied professionals (# of contacts)</p>	<p>4 4 10</p>	<p>9 1 1</p>	Philan with Continuing Ed Taskforce
6	<p><i>Invite qualified prospects to join the Heritage Society and raise awareness of the benefits of belonging to the society:</i></p> <p>1) New Heritage Society members</p>	20	13	
7	<p><i>Close new and document existing planned current and future gifts with emphasis on promoting blended gifts from LLUH donors.</i></p>	\$18,000,000	\$32,255,719	Todd - \$7,000,000 Ron - \$7,000,000 PGO - \$4,000,000

Departmental goals focus on these areas:

1. Marketing
2. Donor contacts
3. Assisting FLFs
4. Training opportunities
5. Legacy Society members
6. Dollar goals

Campaign Report



June 30, 2019

#1 Vision 2020 Campaign Progress by Priority

Education and Research Priorities	Outright	Pledges Paid	Pledge Balance	Deferred Gifts Irrevocable	Deferred Gifts Revocable	Total	Working Goal	% of Goal
Scholarships	\$22,439,970	\$2,929,444	\$1,195,643	\$6,214,094	\$23,619,718	\$56,398,878	\$20,000,000	281.99%
Research Discoveries	\$20,706,531	\$2,979,821	\$1,453,784	\$1,036,035	\$6,777,556	\$33,703,732	\$15,000,000	224.69%
Faculty Development	\$2,610,314	\$6,750	\$1,125,050	\$1,875	\$4,790	\$11,788,989	\$10,000,000	117.89%
New Educational Approaches	\$4,934,964	\$1,125,050	\$3,677,375	\$5,000	\$1,902	\$9,837,300	\$15,000,000	65.58%
Education Unrestricted	\$7,189,023	\$195,526	\$10,605	\$12,241	\$4,623	\$13,252,752		
Research Building	\$452,293	\$38,850	\$4,350	\$0	\$0	\$495,493	\$50,000,000	0.99%
San Bernardino Campus	\$108,355	\$10,040,000	\$0	\$0	\$0	\$10,148,355	\$10,000,000	101.48%
Subtotal	\$58,441,464	\$17,943,111	\$17,943,111	\$7,250,170	\$24,517,241	\$110,559,999	\$120,000,000	113.02%
Clinical Care Priorities								
Hospital Expansion	\$30,565,208	\$75,231,875	\$0	\$0	\$0	\$105,797,083	\$205,000,000	95.75%
International/ Heart Institute	\$90,890	\$300,111	\$0	\$0	\$0	\$391,001	\$10,000,000	10.93%
Proton Treatment Center	\$1,227,001	\$3,563,775	\$0	\$0	\$0	\$4,790,776	\$10,000,000	63.37%
Subtotal	\$31,883,099	\$79,095,761	\$0	\$0	\$0	\$110,978,867	\$225,000,000	90.54%
Wholeness	\$1,622,893	\$1,042,526	\$0	\$0	\$0	\$2,665,419	\$15,000,000	19.53%
Vision 2020 Unrestricted	\$2,162,633	\$195,526	\$0	\$0	\$0	\$2,358,159	\$15,000,000	15.72%
Subtotal	\$3,785,526	\$1,238,052	\$0	\$0	\$0	\$5,023,578	\$15,000,000	33.49%
Vision 2020 Priorities	\$94,110,088	\$98,276,939	\$17,943,111	\$7,250,170	\$24,517,241	\$166,137,749	\$360,000,000	97.27%
Additional Vision 2020 Priorities								
Indio Outpatient Pavilion	\$627,857	\$1,594,375	\$0	\$0	\$0	\$2,222,232	\$6,000,000	88.63%
Total - Vision 2020 Priorities	\$94,737,945	\$99,871,314	\$17,943,111	\$7,250,170	\$24,517,241	\$168,360,000	\$366,000,000	97.13%
Below the Line								
Other - University	\$21,418,417	\$1,883,947	\$843,334	\$1,258,769	\$1,834,287	\$27,238,754		
Other - Hospitals	\$15,991,489	\$2,174,093	\$103,950	\$208,000	\$2,250,000	\$20,727,533		
Other - LLUH	\$1,009,145	\$29,778	\$122	\$0	\$0	\$1,039,045		
Total - Below the Line	\$38,419,052	\$4,087,819	\$947,406	\$1,466,769	\$4,084,287	\$49,005,333		
GRAND TOTAL	\$132,529,140	\$102,364,777	\$85,751,866	\$16,538,449	\$61,982,925	\$404,485,113	\$360,000,000	
Planned Outright Gifts	\$25,727,927				\$78,521,374			
Total Outright and Deferred Planned Gifts for Vision 2020					\$104,249,301			

What has planned giving contributed to the overall campaign totals in each of the 3 buckets?

Total column is sum of Gifts, Pledges, and Deferred Gifts since January 1, 2013

Expectancy Report

Expected Maturities by Type and Year



Return on Investment (ROI)


Planned Giving - 2018-2019 ROI Report Template

Planned Giving - Due	This Month-December 2018	YTD	YTD Target	Comments
Reporting Items				
LOCAL (Planned Giving Team)				
1. # of Qualifications			50	Waiting for metrics report
2. # of ITS forms filed				Waiting for metrics report
3. Planned Giving Pipeline (# and \$ amount of planned giving prospects in Qualification, Cultivation and Solicitation)			7M	\$19M goal X 3
Internal (Advancement Team)				
1. Marketing materials produced				
2. PD-PG-FLF Strategy Sessions	0	90	96	
3. Planned Giving training sessions (Philanthropy staff: # of hours, LLUH Faculty/Staff: # of sessions, Allied professionals: # of contacts)	0	Philanthropy staff: 4 hours LLUH Faculty/Staff: 0 sessions Allied Professionals: 1 contacts		
4. New Heritage Society members	1	10	12	
Leadership				
1. Planned Gifts Documented	\$10,801,761.00	\$28,851,693.00		
2. ROI - (Planned Gifts documented/Dollars spent)	215:1	113:1		
Under/Over Budget	\$5,398	\$72,893.00		

The ROI report has 3 sections for different areas: Local, Internal and Leadership.

The bottom line for leadership:

“If you give planned giving \$1, we will put \$113 in the pipeline.”



The ROI for \$1 of expenditure for various fundraising activities:

➤ Bequests	\$56.83
➤ Major Gifts	\$33.33
➤ General Donations	\$19.11
➤ Community Fundraising	\$11.15
➤ Direct Mail	\$ 3.66
➤ Events	\$ 3.43



Summary

- Set goals and expectations
- Establish tools that measure activity and outcomes
- Share information regularly and consistently



Questions

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