

Officer Benchmarks

Frequently Asked Questions

What are Gift Officer Benchmarks?

The Officer Benchmarks dashboard allows Reeher users for the first time to access Reeher Community benchmark data directly in the Reeher Platform. Found in a new "Officer Benchmarks" tab in the Major Giving Layer, The Officer Benchmarks dashboard makes available key Reeher Community benchmarks that our research shows to be most predictive to determine long term gift officer success.

The Officer Benchmarks are designed to give you real-time evaluations of officer portfolios compared to the rest of the Reeher Community based on officer roles or peer groups. This is a new and innovative way to see how your team compares in nine different areas with data that is only available through Reeher.

Unlike our Officer Goals data found in the Console layer, this new dashboard is predictive, rather than an evaluation of current performance. While the Officer Goals dashboard

reflects activity in the current fiscal year, the metrics in the new Officer Benchmarks dashboard are calculated over a rolling 12-month window. This ensures that each time the Officer Benchmarks dashboard is viewed, it provides a snapshot that levels out seasonal effects in contacts, visits, and solicitations.

Officer Benchmarks			Officer Role Group	A/I Roles •	Q. Search	٥
Benchmarks:	EVI Efficiency	% Contacted	First Time Visits	% Proposals Granted	% Proposals Granted >= \$50,000	
Reeher Community	Top Quartile: 84	Top Quartile: 72%	Top Quartile: 61	Top Quartile: 14.29%	Top Quartile: 5.13%	- 1
(All Roles)	Median: 72	Median: 51%	Median: 28	Median: 7.5%	Median: 2.63%	- 1





Which Benchmarks are Found in the Dashboard?

We have chosen benchmarks that our research has shown to be most predictive to determine long term gift officer success. These are:

- Expected Value Index (EVI) Efficiency: EVI Efficiency is calculated as the percentage of a portfolio that has an EVI of 95 or higher. Higher EVI Efficiency means that a portfolio is well suited for discovery as well as optimized for value of potential donations.
- 2. **Percent** contacted: This value is calculated as the percentage of households in this portfolio that has had at least one contact from the currently assigned gift officer in the last 12 months. Prior contacts by other officers are not counted, nor are contacts from other staff.
- 3. **First Time Visits:** Reeher's statistics on officer success show a strong correlation between first-time visits and dollars raised. This value is calculated as the percentage of households in this portfolio that has had a first-time visit from the currently assigned gift officer in the last 12 months. Visits from other officers are excluded.
- 4. **Percent of Proposals Granted:** This value is calculated as the percentage of households in this portfolio that have had at least one proposal granted that involved the currently assigned gift officer and was granted within the last 12 months.
- 5. Percent of Proposals Granted Equal to or Greater Than \$50,000: This value is calculated as the percentage of households in this portfolio that have had at least one proposal granted with a final value of over \$50,000 that involved the currently assigned gift officer and was granted within the last 12 months. It will always be a subset of the "% Proposals Granted"
- 6. **Portfolio Size:** The portfolio sizes shown here are householded. Reeher generally recommends a portfolio size of between 120-150 prospects to ensure that enough prospects can be contacted and visited effectively. We understand that opinions vary, but we have found these suggestions to be generally indicative of officer success among our community members.
- 7. **Percent Visited:** This value is calculated as the percentage of households in this portfolio that has had at least one visit from the currently assigned gift



officer in the last 12 months. Prior visits by other officers are not counted, nor are visits from other officers.

- 8. **Percent of Proposals Asked:** This value is calculated as the percentage of households in this portfolio that have had at least one proposal ask that involved the currently assigned gift officer made within the last 12 months.
- 9. Percent of Proposals Asked Equal or Greater Than \$50,000: This value is calculated as the percentage of households in this portfolio that have had at least one proposal ask with an ask amount over \$50,000 that involved the currently assigned gift officer made within the last 12 months. It will always represent a subset of the "% Proposals Asked" column.

The Dashboard will display five benchmarks at a time. You can change which benchmarks you want to display by clicking on the blue gear near the search box in the upper right-hand corner.

		Change Columns
		Please select a minumum and maximum of 5 benchmark categories. You have 0 remaining.
		✓ % Proposals Granted
		✓ % Proposals Granted >= \$\$0.000
Q Search	*	✓ First Time Visits
Scaren	~	✓ % Contacted
		✓ EVI Efficiency
		% Proposals Asked
		□ % Proposals Asked >= \$50.000
		Portfolio Size
		C % Visited
		Cancel Submit



How do I Interpret the Benchmarks?

Each benchmark result has the word "Details" displayed next to it in blue font. You can access the benchmark definitions by simply clicking on "Details".



How Were the Benchmarks Calculated?

Using the recent responses users gave when asked to identify their role in the platform, we have calculated benchmarks for each officer role against the whole Reeher Community.



This has given us unprecedented insight into gift officer success based on similar roles among 110+ http://www.stthomas.edu/dfc/aboutus/higher education institutions.

The dashboard will also give you the opportunity to benchmark your institution's peer groups against one another (as configured in Officer Goals) or against officers in similar roles within the Reeher Community.

What is the Group Entitled "Unknown" Role?

When working in the Officer Benchmarks dashboard, you will likely see a group called "Unknown Role." Typically, these are officers who are listed in your data file as officers, but who are not assigned a user license for Reeher. Please work with a gift officer manager or prospect manager at your institution to assign these individuals to the appropriate role to get the most from your benchmark data.



How Can I Change My Gift Officer Role?

Gift Officer roles can be edited by clicking on the pencil icon next to the role that the officer is currently assigned (some may be in the unknown role group). After clicking on the pencil icon, choose the officer you would like to change and select from the drop-down box of available roles.

•	Unknown Role			
	Edit Roles - Unknown Role			
	82 Gift Officers			
	Timothy Johnson		Bryon Haas	
	Ann Costello		Stephanie Nienaber	1
	Delores Slater		Jayne Harrison	1
	Tracy Machan		Terry Hurst	1
	Sagi Roberts		Nikki Wharton	1
	Peter Riggs		Nicholas Knolle	1
dit Roles - Unknov	wn Role	Ň	Robert Suker	1
mothy Johnson				÷.
Unknown Role Unknown Role Executive Gift Officer Head of Fundraising Other VP Or Director Gift Officer Manager Corporate/Foundation Major Gift Officer Planned Giving Office Principal Gift Officer	Manager n Gift Officer r	Cance	Save	Done



How Does an Institution Turn on Officer Benchmarks?

System Administrators or those with certain rights to the control panel can turn on the Officer Benchmarks. Follow these steps:

- 1. Open Control Panel
- 2. Expand Manage Users
- 3. Click Profiles
- You must have a profile set up for any group of users that gets Officer Benchmarks. This may mean creating a new profile and assigning users to it. (see: <u>https://platform.reeher.com/ihelp/display/Help/Profiles</u>)
- 5. Select the profile that should have access to the Officer Benchmarks ("Edit Profile) on the right
- 6. In the dialog that appears, look under Major Giving Dashboard
- 7. Tick the box for Officer Benchmarks

М	lajor Giving Dashboard	
	Select additional officers this user can view	
	All Officers, Proposals, and Contacts	•
	Activities Management	1
	Officer Performance	1
	Prospect Assignments	1
	Proposals	•
	Contacts	1
	Officer Benchmarks	1

How Does an Institution Control Who Has Access to the Officer Benchmark Tab?

Access to the Officer Benchmark tab is a user-based permission that can be set in "Manage Users" in the control panel. Certain rights to the control panel may apply.

