

Officer Goals Management Capability

➤ Set officer goals and track progress from within the Reeher Platform

Many gift officers approach their workday with unclear or undefined goals to guide them. This can result in an unproductive overemphasis on one activity over another, such as spending too much time revisiting existing prospects and too little time seeking new sources of giving.

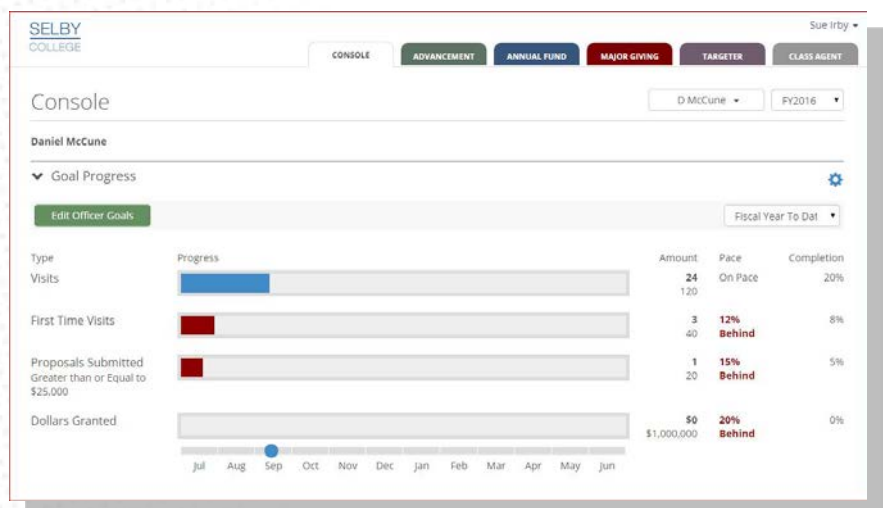
With the **Reeher Officer Goals Management** capability, you can easily set and track clear goals for your team — and keep those priorities front and center for your officers.

Presented on the new Officer Console, an intuitive graphical display of progress across multiple activities will be the first thing your officers see on the Reeher Platform. They will know at a glance whether they are on track or behind schedule for each activity, receiving useful guidance on how to spend their time. Different goals and activities can be customized for individual officers or officer peer groups, based on role and seniority level.

56% of gift officers don't raise enough money to cover their own costs, often due to an imbalance in time spent on various activities.

Source: Reeher Fundraising Maturity Model research, 2015.

- **Improve team productivity**
- **Enhance officer morale**
- **Quickly onboard new staff**
- **Optimize advancement team results**



The Officer Console makes it easy to set and track progress for your team. Each gift officer sees a snapshot of his or her goal progress by activity to help prioritize the workday, while having quick access within the Console to prospects, contact activity and proposals.

Set Goals across Multiple Activities

Effective goal setting for your officers is a balancing act. You need to find the proper mix of activities to ensure all bases are covered, but without overemphasizing any single task. It is also important to avoid having so many goals that your employees have difficulty focusing. That's why the Reeher Officer Goals Management capability allows you to select any of these activities for each officer:

- Visits
- First-time visits
- Proposals submitted (with option to specify dollar range)
- Dollars granted
- Contacts made
- Dollars submitted
- Proposals granted (with option to specify dollar range)

Suggested Annual Goals for Full-Time Officers

The next step involves establishing goals that motivate and challenge each officer while remaining realistic. Based on activity levels of the top 25% performing officers from across the Reeher Community, we suggest the following targets for the four most basic officer goals:

Number of visits: 120

First-time visits: 40

Proposals submitted: 20 at \$25,000 or more each

Dollars granted: \$1 million

These targets are used as the default values in the Officer Goals Management system to help you get started, but you can easily adjust them up or down as needed according to current productivity. You may also want to customize your goals based on the different types of officers at your institution. For example, it may make sense for principal gift officers to work toward a higher dollars-granted goal and a lower first-time visits goal, whereas you may want to encourage junior officers to pursue an elevated number of first-time visits.

Learn More Today

The Officer Goals Management capability is an integrated feature on the Reeher Platform, available at no cost to eligible subscribers. Contact us to learn more about how this feature can help you better manage your team and elevate the performance of your development office.

Call 651.789.1700, email info@reeher.com.

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