Appendix B: University Annual Goal Metrics

B.1 Definition of Annual Goal Metrics Urbana

University-Level Annual Goal Metrics:

B.1.1 New Business

New Business generally includes new outright gifts, documented major pledges, grant awards, irrevocable deferred, and revocable deferred commitments. New Business excludes contracts, major pledge payments, grant payments, life insurance premium payments, and estate distributions where the revocable commitment was previously documented. For commitments where fulfillment is highly variable, such as telemarketing pledges, new business includes the payment, but not the pledge.

B.1.2 Cash

Cash includes payments on outright gifts and private grants in a given year, as well as pledge payments, irrevocable deferred payments, and estate distributions. Cash flow excludes non-gift revenue, contract payments, and commitments such as pledges and grant awards that have not yet been paid.

B.1.3 Annual Giving Cash

Annual Giving cash includes outright and pledge payments under $25,000 from individuals and organizations, with certain exceptions. For a full list of exceptions, see the Development Processes and Procedures document here:

https://online.uif.uillinois.edu/InfoCenter/DevelopmentProcessandProcedures.pdf

B.1.4 Donors from $1K-$24,999K (#)

Donors from $1K-$24,999K (#) includes the total number of donors who have made gifts totaling between $1,000 and $24,999.99, where the gifts meet the criteria of Annual Giving (see above). This metric includes all household members who have any recognition credit.

B.1.5 Alumni Donors (#)

Alumni Donors (#) includes the total number of cash donors who have affiliated institution education records with a status of Graduated or Incomplete from the University in question.

**Note:**

Donors are further limited to those whose gifts meet the Annual Giving definition. This metric includes all household members who have any recognition credit.

**Confidential information must be stored in a secure environment and should not be redistributed electronically except to persons authorized to receive such content.**
B.1.6. Opportunities # ($25K+)

Opportunities # ($25K+) includes the total number opportunities with a status of Response Pending, Accepted, or Rejected made by a development officer as primary plan manager or secondary solicitor at the major gift ($25K+) level.

⚠️ Note:
Opportunities are counted in the year the ask was actually made, rather than the year it was accepted or revenue was received.

Unit-Level Goal Metrics:

B.1.7. New Business

New Business generally includes new outright gifts, documented major pledges, grant awards, irrevocable deferred, and revocable deferred commitments. New Business excludes contracts, major pledge payments, grant payments, life insurance premium payments, and estate distributions where the revocable commitment was previously documented. For commitments where fulfillment is highly variable, such as telemarketing pledges, new business includes the payment, but not the pledge.

B.1.8. Opportunities # ($25K+)

Opportunities # ($25K+) includes the total number opportunities with a status of Response Pending, Accepted, or Rejected made by a development officer as primary plan manager or secondary solicitor at the major gift ($25K+) level.

⚠️ Note:
Opportunities are counted in the year the ask was actually made, rather than the year it was accepted or revenue was received.

Individual-Officer-Level Goal Metrics:

B.1.9. New Business from Pipeline

New Business from Pipeline includes the total dollar value of commitments applied to opportunities made as primary plan manager or secondary solicitor with revenue associated with that opportunity.

⚠️ Note:
This metric is based on the date when revenue is booked. Opportunities may have been made and accepted in any fiscal year, but revenue committed to an Opportunity this year will count toward this year’s progress. If more than one revenue transaction is associated with an opportunity, all transactions are combined and assigned to the earliest gift date.

B.1.10.(FOR MAJOR GIFT OFFICERS) Opportunities # ($25K+)

(FOR MAJOR GIFT OFFICERS) Opportunities # ($25K+) includes the total number opportunities with a status of Response Pending, Accepted, or Rejected made by a development officer as primary plan manager or secondary solicitor at the major gift ($25K+) level.

⚠️ Note:
Opportunities are counted in the year the ask was actually made, rather than the year it was accepted or revenue was received.
B.11. (FOR SELECTED OTHER OFFICERS, CONSULT YOUR MANAGER) Opportunities # (Under $25K)

(FOR SELECTED OTHER OFFICERS, CONSULT YOUR MANAGER) Opportunities # (Under $25K) includes the total number opportunities with a status of Response Pending, Accepted, or Rejected made by a development officer as primary plan manager or secondary solicitor at annual giving (Under $25K) level.

**Note:**
Opportunities are counted in the year the ask was actually made, rather than the year it was accepted or revenue was received.

**Note:**
There are currently no individual visit goals for Urbana.

B.2. Definition of Annual Goal Metrics UIS

University-Level Annual Goal Metrics:

B.2.1. New Business

New Business generally includes new outright gifts, documented major pledges, grant awards, irrevocable deferred, and revocable deferred commitments. New Business excludes contracts, major pledge payments, grant payments, life insurance premium payments, and estate distributions where the revocable commitment was previously documented. For commitments where fulfillment is highly variable, such as telemarketing pledges, new business includes the payment, but not the pledge.

B.2.2. Cash

Cash includes payments on outright gifts and private grants in a given year, as well as pledge payments, irrevocable deferred payments, and estate distributions. Cash flow excludes non-gift revenue, contract payments, and commitments such as pledges and grant awards that have not yet been paid.

B.2.3. Annual Giving Cash

Annual Giving Cash includes outright and pledge payments under $25,000 from individuals and organizations, with certain exceptions. For a full list of exceptions, see the Development Processes and Procedures document here: https://online.uif.illinois.edu/InfoCenter/DevelopmentProcessandProcedures.pdf.

B.2.4. Donors from $1K-$24,999K (#)

Donors from $1K-$24,999K (#) includes the total number of donors who have made gifts totaling between $1,000 and $24,999.99, where the gifts meet the criteria of Annual Giving (see above). This metric includes all household members who have any recognition credit.

B.2.5. Alumni Donors (#)

Alumni Donors (#) includes the total number of cash donors who have affiliated institution education records with a status of Graduated or Incomplete from the University in question.

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1. Please note criteria for goal metrics occasionally get tweaked or refined by leadership. We will update the information reflecting changes, as needed and as appropriate. Please contact Diana Joyce with any specific questions.
**Note:**
Donors are further limited to those whose gifts meet the Annual Giving definition. This metric includes all household members who have any recognition credit.

### B.2.6. Opportunities # and $
Opportunities # and $ includes the total number or $ of opportunities with a status of Response Pending, Accepted, or Rejected made by a development officer as primary plan manager or secondary solicitor at the leadership annual giving (Under $25K) OR the major gift ($25K+) level.

**Note:**
Opportunities are counted in the year the ask was actually made, rather than the year it was accepted or revenue was received.

#### Individual-Officer-Level Goal Metrics:

### B.2.7. New Business from Pipeline
New Business from Pipeline includes the total dollar value of commitments applied to opportunities made as primary plan manager or secondary solicitor with revenue associated with that opportunity.

**Note:**
This metric is based on the date when revenue is booked. Opportunities may have been made and accepted in any fiscal year, but revenue committed to an Opportunity this year will count toward this year’s progress. If more than one revenue transaction is associated with an opportunity, all transactions are combined and assigned to the earliest gift date.

### B.2.8. Opportunities # and $
Opportunities # and $ includes the total number opportunities with a status of Response Pending, Accepted, or Rejected made by a development officer as primary plan manager or secondary solicitor at the leadership annual giving (Under $25K) OR major gift ($25K+) level.

**Note:**
Opportunities are counted in the year the ask was actually made, rather than the year it was accepted or revenue was received.

### B.2.9. Visits
Visits calculates the total number of substantive face-to-face Interactions on a Plan conducted by a gift officer, counted when a Contact Report has been filed with a Contact Method of Personal Visit or Campus Visit.

### B.3. UIC Office of the Vice Chancellor for Advancement FY19 Annual Goal Metric Definitions
#### University-Level and Unit-Level Annual Goal Metrics:

### B.3.1. New Business
New Business generally includes new outright gifts, documented major pledges, grant awards, irrevocable deferred, and revocable deferred commitments. New Business excludes contracts, major pledge payments, grant payments, life insurance premium payments, and estate distributions.
where the revocable commitment was previously documented. For commitments where fulfillment is highly variable, such as telemarketing pledges, new business includes the payment, but not the pledge.

B.3.2. Cash
Cash includes payments on outright gifts and private grants in a given year, as well as pledge payments, irrevocable deferred payments, and estate distributions. Cash flow excludes non-gift revenue, contract payments, and commitments such as pledges and grant awards that have not yet been paid.

B.3.3. Annual Giving
Annual Giving includes outright and pledge payments under $25,000 from individuals and organizations, with certain exceptions. For a full list of exceptions, see the Development Processes and Procedures document here: [https://online.uif.uillinois.edu/InfoCenter/DevelopmentProcessesandProcedures.pdf](https://online.uif.uillinois.edu/InfoCenter/DevelopmentProcessesandProcedures.pdf).

B.3.4. Donors from $1K-$24,999K (#)
Donors from $1K-$24,999K (#) includes the total number of donors who have made gifts totaling between $1,000 and $24,999.99, where the gifts meet the criteria of Annual Giving (see above). This metric includes all household members who have any recognition credit.

B.3.5. Alumni Donors (#)
Alumni Donors (#) includes the total number of cash donors who have affiliated institution education records with a status of Graduated or Incomplete from the University and/or Unit in question. This metric includes all household members who have any recognition credit.

B.3.6. MG Opportunities (#)
MG Opportunities (#) includes the total number opportunities with the actual ask date in the current fiscal year, with a status of Response Pending, Accepted, or Rejected made by a development officer as primary plan manager or secondary solicitor at the major gift ($25K+) level.

Note:
Opportunities made in previous fiscal years with revenue committed in current fiscal year are not counted in this metric.

Individual-Level Annual Goal Metrics:

B.3.7. New Business from Pipeline
New Business from Pipeline includes the total dollar value of commitments applied to opportunities made as primary plan manager or secondary solicitor with revenue associated with that opportunity.

Note:
This metric is based on the date when revenue is booked. Opportunities may have been made and accepted in any fiscal year, but revenue committed to an Opportunity this year will count toward this year’s progress. If more than one revenue transaction is associated with an opportunity, all transactions are combined and assigned to the earliest gift date.
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**B.3.8. MG Opportunities (#)**

MG Opportunities (#) includes the total number opportunities with the actual ask date in the current fiscal year, with a status of Response Pending, Accepted, or Rejected made by a development officer as primary plan manager or secondary solicitor at the leadership annual giving (Under $25K) or major gift ($25K+) level.

**Note:**

Opportunities made in previous fiscal years with revenue committed in current fiscal year are not counted in this metric.

**Note:**

UIC counts all opportunities regardless of level, in individual metrics, using the above definition. Major gift fundraising staff are allowed a maximum of 5 opportunities below $25K.

**B.3.9. Total Major Gift + Stewardship Plans Under Management (#)**

Total Major Gift + Stewardship Plans Under Management (#) includes:

- **Plan Management (Major Gift)**
  Calculates the total number of Plans, with a Plan Type of Major Gift, for which the gift officer is the Primary Plan Manager or Secondary Solicitor (includes CFR for UIC). AND

- **Plan Management (Stewardship)**
  Calculates the total number of Plans, with a Plan Type of MG-Donor Stewardship or Stewardship and Donor Relations, for which the gift officer is the Primary Plan Manager.

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**Administrative Detail**

- **Governing Body:** Executive Operations Team  
  **Term:** Ongoing  
  **Review Schedule:** Annual

- **Direct Questions to:** UIF Policies

- **Effective:** Blackbaud Go-Live, November 2015

- **Status:** Approved  
  **Approved:** July 15, 2015