



KPIs at a Glance

An overview of Veritus KPIs at a Glance for relationship-focused mid-level and major gifts programs.

Major Gifts KPIs

01

Caseload

Each full time MGO should have a qualified caseload of 150 donors.

02

Overall Revenue

Total dollars raised, measured separately to show true bottom-line performance.

03

Track How Each Donor Performs Year-Over-Year

- Track each donor's value attrition/growth.
- Compare actual giving vs. individual goal.
- Watch for outliers.

04

Meaningful Connections (MCs)

Track how many meaningful connections you have with each donor. These can be meetings, calls, emails, texts, video calls, or other connections that move the relationship forward.

05

Working the Plan - Each Donor Should Have:

- Identified passions/interests.
- Communication preferences.
- Tier designation(A/B/C).
- Individual goals, cash flowed to the month or months you expect the funds.
- Personalized stewardship and ask touch points based on donor interests built into the DEP.
- Identify and create strategic plans for 3-5 donors with transformational giving potential.



KPIs at a Glance

Mid-Level KPIs

01

Caseload

Each MLO should have a caseload between 500-700 donors.

02

Overall Revenue

Total dollars raised, measured separately to show true bottom-line performance.

03

Track How Each Donor Performs Year-Over-Year

- Track each donor's value attrition/growth.
- Watch for outliers: ensure one large gift does not mask underperformance of other donors.

04

Meaningful Connections (MCs)

Track how many meaningful connections you have with each donor. These can be meetings, calls, emails, texts, video calls, or other connections that move the relationship forward.

05

Working the Plan - Each Donor Should Have:

- Identify passions/interests.
- Capture communication preferences.
- Tier designation (A/B/C).
- Relationally qualify donors.
- Personalized stewardship and ask touch points based on donor interests built into the DEP.

06

Keep, Lift, Move

- Keep: Retain donors and improve attrition
- Lift: Increase the revenue per donor
- Move: Accelerate the movement and number of relationally qualified mid-level donors that meet giving levels to the major gift program, tracking the number of donors and value of giving at the time of the move.