

Examples of Progress with Our Clients

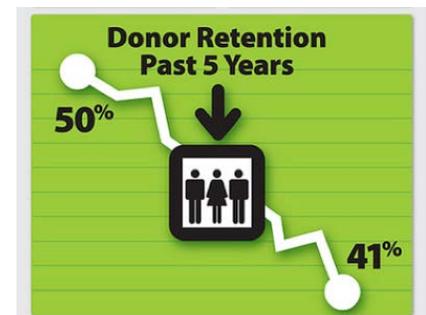
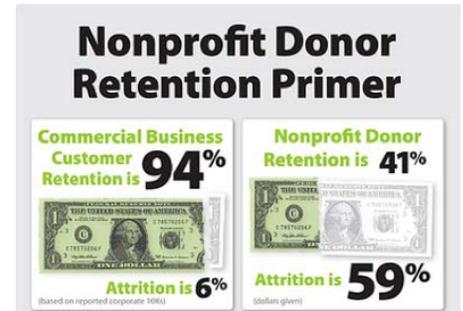
Veritus Group has worked with non-profit organizations for many years, designing and helping to manage major gift programs with hundreds of Major Gift Officers. We have seen substantial progress with most of them, especially in the area of value retention.

When we evaluate a non-profit's major gift performance, we focus on two things: **value retention** (dollar value retained year over year from the **same** donors) and **donor retention** (number of donors who continue their giving year after year).

Over a ten-year period of tracking donor behavior, the value retention of most non-profits in the United States, Canada and Europe is in the 30-60% range, and donor retention is often worse. In fact, a study by Bloomerang (images to the right) found that the average donor retention is 41% and has been dropping over the past five years.

This is a serious problem that has three root causes: (1) No real structure implemented for a major gift program (2) Poor treatment of donors from the thank you and gift acknowledgement process all the way through cultivation and stewardship, and (3) Not telling the donor that their gift made a difference.

The examples below highlight some of the work we've done with different organizations. Through implementing a structure, ongoing management and coaching, major gift officers retain 85-93% of the value from donors who are on their caseload and are properly managed, as evidenced by increased donations per year. This is a substantial increase in performance compared to overall trends in the nonprofit sector.



Example 1 – Social Services

Veritus started a major gifts program with a large international social service organization, developing caseloads and criteria for existing MGOs and hiring new MGOs. The program grew to 35 MGOs that is now producing \$41.5 million a year.

| Social Services Org Results | | |
|-----------------------------|--------------|--------|
| | Income | Change |
| Year 1 | \$23,275,000 | |
| Year 2 | \$27,546,215 | +18% |
| Year 3 | \$31,736,962 | +15% |
| Year 4 | \$36,281,988 | +14% |

| Veterans' Services Org Results | | |
|--------------------------------|-------------|--------|
| | Income | Change |
| Year 1 | \$1,428,676 | |
| Year 2 | \$1,620,103 | +13% |
| Year 3 | \$1,864,383 | +15% |
| Year 4 | \$1,904,613 | +2% |

Example 2– Veterans' Services

Veritus developed a major gifts program for a national veteran's services group. We identified donors, created caseloads and managed five MGOs.

Examples of Progress with Our Clients, continued

Example 3 – Faith Based Organization

Veritus began managing an Executive Director with a smaller pool of donors. By applying principles of qualification then cultivation, along with focused asks with specific amounts, the ED raised significantly more money with a caseload of only 63 donors.

| Faith-based Org Results | | |
|-------------------------|-------------|--------|
| | Income | Change |
| Year 1 | \$305,650 | |
| Year 2 | \$1,269,095 | +315% |
| Year 3 | \$1,905,871 | +50% |

| Human Services Org Results | | |
|----------------------------|-----------|--------|
| | Income | Change |
| Year 1 | \$303,839 | |
| Year 2 | \$581,189 | +91% |
| Year 3 | \$940,287 | +62% |

Example 4 – Human Services

Veritus worked with a talented MGO to reduce her caseload to include qualified donors. She then tiered them and developed specific asks targeted to donor interests. The MGO was able to upgrade 50% of the caseload, as well as bringing in two 6-figure gifts.

Example 5 – Food Equity

Veritus managed a fundraising team of seven MGOs and a midlevel representative. Our analysis led to a departmental reorganization where we clarified roles and responsibilities. We then qualified caseloads, created plans and helped the staff manage donors. The midlevel program was recommended and created by Veritus and is presently used as an industry best-practice model.

| Food Equity Org Results | | |
|-------------------------|-------------|--------|
| | Income | Change |
| Year 1 | \$7,212,095 | |
| Year 2 | \$8,793,231 | +22% |

| Domestic Violence Prev Org Results | | |
|------------------------------------|-----------|--------|
| | Income | Change |
| Year 1 | \$300,382 | |
| Year 2 | \$415,637 | +38% |

Example 6 – Domestic Violence Prevention Services

Veritus began a major gifts program six months into the fiscal year and saw immediate results in the final quarter of that year.

Example 7 – University

Veritus helped create a caseload pool by changing the focus from capacity ratings to giving history. By applying personal touches, the MGO saw quick growth. In addition to the \$747K noted here, the MGO secured an additional one-time gift of \$2.5 million.

| University MGO Results | | |
|------------------------|-----------|--------|
| | Income | Change |
| Year 1 | \$470,500 | |
| Year 2 | \$747,000 | +59% |

"It's a relief to be working with Veritus. I've found it nearly impossible to spend adequate individual time with each gift officer on my team. It's the key to greater gift production. The steady increase in our numbers says it all. Not only does this add another level of accountability, but it's a strong support system for each gift officer almost ensuring their success. We consider ourselves to be 'Veritus Scholars!'"

Cynthia Cashman, Chief Development Officer
College of Food, Agriculture & Natural Resource Sciences
University of Minnesota

We'd love to talk to you about how we can help you get these kinds of results. Please contact me.

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