

GIFT ADMINISTRATION BENCHMARK STUDY: FROM INTAKE TO FINALIZATION

This information is for Benchmarking survey among 17 universities. The survey asked very specifically how many people spent how many hours each week with gift intake, batching, entry, and finalization. The summary results show:

- **Staffing:** Team sizes ranged from 8 to 1 gift processing staff, averaging 4.75 FTE (8.5% of total fundraising FTE count). However, the number of average hours spent per week was 133 (or the equivalent work of 3.325 FTEs), not the 190 hours *in toto* available from 4.75 FTEs. This suggests that many team members have other duties aside from gift processing.
- **Volume:** Respondents ranged from 78,681 to 5,125 total transactions, averaging 30,806. Shops averaged 6,486 transactions per FTE involved (i.e., 4.75 average FTEs divided by 30,806 average transactions). Note that the “FTE” here includes time from team members who sort and open the mail, receipt and acknowledge gifts, and reconcile results.
- **Balance of time:** Respondents indicated they spend 15% of their time on gift intake, 15% on batching activity, 44% of actual gift entry, and 26% on finalizing gift via receipting and reconciliation.
- **Efficiency:** Team members averaged 4.6 gifts per hour. The typical gift processing turnaround time (from intake to receipt mailing) is 2.85 days.
- **Policies:** Handling solicitor credit and DAFs varies a great deal, suggesting broad interpretations for protocols.

NINE OUT OF SEVENTEEN RESPONDENTS ARE IN A CAMPAIGN (53%)

	Is institution in a campaign?	Stage	Goal
School A	No	N/A	N/A
School B	No	Campaign ended 5/31/2011	N/A
School C	No	N/A	N/A
School D	No	N/A	N/A
School E	Yes	Silent	
School F	No	N/A	N/A
School G	Yes	Silent phase	\$100 million (tentative)
School H	Yes	Silent phase	
School I	Yes	Public phase	\$500 million
School J	No	N/A	N/A
School K	No	N/A	N/A
School L	Yes		\$375 million
School M	Yes	Public phase	\$100 million
School N	Yes	Public phase	\$750 million
School O	Yes	Public phase	\$1 billion
School P	Yes	Public phase	\$1 billion
School Q	No	N/A	N/A

STAFF RATIOS: 55.8 IN DEVELOPMENT AND 4.75 SPEND TIME WITH GIFT PROCESSING

	Size of Development (Fundraising) Staff	Staff Members Spending Some Time on Gift Processing	Total # of Hours Per Week Spent by Staff on These Aspects of Gift Processing			
			Intake	Batch	Entry	Finalization
School A	11	1	3	2	10	15
School B	23	6	14	18	22	42
School C	—	5	3	7.5	80	28
School D	52	7	25	30	102	100
School E	42	2	5	7	36	45
School F	37	3	2	5	30	11
School G	10.33	1	5	3	20	9.5
School H	20	3	27.5	19.5	40	28
School I	50	8	35	23	111	34
School J	160	5	15	45	30	12
School K	41	4	35	15	63	47
School L	36	4	5	30	85	40
School M	—	4	25	42	19	64
School N	50	7	50*	1	40–50	Different Dept.; 4 FTE; 10 PT
School O	118	5	31	28	105	21
School P	52	5	30	21	79	30
School Q	90	7	33.5	30	59	11

SYSTEM USE AFFECTED SOME RESPONSES

	Donor Database Used	Period of Time in Use	Planning a change in the next 24 mos?
School A	Raiser's Edge	6 years	No
School B	Banner 8.3	19 years	No
School C	Banner Advancement	4 years	No
School D	Banner Advancement	6 years	Under consideration
School E	Datatel Colleague	25+ years*	No
School F	Datatel Colleague Advancement	Datatel: 14 years Colleague Advancement: 11 mos.	No
School G	Banner Advancement	9 years	No
School H	RE7	9 years	No
School I	Sungard's Banner	4 years	No
School J	Raiser's Edge	3 years	Upgrade to Blackbaud CRM
School K	Raiser's Edge	3 years	No
School L	Banner	19 years	Possibly
School M	Banner	20 years	No
School N	Blackbaud Enterprise	17 months	No
School O	Advance 9.4	21 years	Yes; to AWA
School P	Millennium	16 years	Potentially
School Q	Banner	20+ years	No

*Converted from Datatel Benefactor in January 2010.

**GIFT TYPE AFFECTED TURNAROUND TIMES:
40% CHECKS/CASH; 19% CREDIT; 20% PLEDGES; 18%
PAYMENTS; 3% OTHER**

	Typical Annual Gift Volume, by Type				
	Cash/ Checks	Credit Card	Pledges	Pledge Payments	Other
School A	2,011	816	1,094	1,179	25
School B	2,851	2,947	5,442	4,921	—
School C	8,929	2,557	3,634	3,590	201
School D	12,145	4,632	806	4,282	2,924
School E	4,656	2,578	3,163	6,591	300
School F	6,000	1,525	5,215	4,125	—
School G	4,400	1,600	2,200	2,500	60
School H	3,282	1,213	1,565	1,042	315
School I	14,180	7,377	8,323	6,879	916
School J	26,000	8,500	7,000	9,000	900
School K	27,351	11,475	3,187	3,819	317
School L	11,917	6,900	3,020	—	1,795
School M	26,553	9,525	7,326	15,242	—
School N	22,005	10,950	40,357	5,369	—
School O	7,651	5,919	6,800	8,970	2,127
School P	16,854	11,165	2,775	5,698	582
School Q	14,699	8,178	4,015	5,467	417

TIMING IS CHALLENGING: OCT-DEC ACCOUNTS FOR 33% ON AVERAGE; 13.5% IN DECEMBER

What Percentage of your transactions are received per month?

	School A	School B	School C	School D	School E	School F	School G	School H	School I	School K	School L	School M	School N	School O	School P	School Q
Jan	3	13	5	7	4	9	9	6	5	10.2	11	7.8	9.7	5.4	15	4.79
Feb	3	8	5	7	8	9	9	9	5	9.11	5	6.8	6.08	7.81	3	4.58
Mar	10	11	5	9	9	9	11	11	8	7.12	9	11.2	9.7	9.37	3	8.95
Apr	10	10	6	10	9	8	8	10	12	9.71	12	10.4	11.4	10.93	3	8.21
May	15	16	7	8	10	8	7	6	10	9.43	12	9.1	11.7	7.25	3	8.57
Jun	3	3	3	7	4	7	4	6	13	11.32	10	6.8	1.2	9.4	20	11.79
Jul	3	2	2	8	3	6	2	6	2	3.45	8	6.4	3.4	3.33	10	2.86
Aug	3	3	3	5	3	7	4	6	3	8.08	3	6.9	3.6	2.89	5	2.91
Sep	5	7	7	7	11	8	9	7	3	7.59	6	7.8	7.3	5.12	4	5.84
Oct	10	12	9	10	14	9	14	11	7	8.54	6	7.8	13.4	12.26	4	7.11
Nov	15	8	10	8	12	10	12	12	12	6.7	8	7.9	12.7	11.45	10	12.26
Dec	20	7	14	14	13	10	11	10	20	8.75	10	11.2	9.7	14.8	20	22.12

WHILE PROCESSING TIMES VARIED, ABOUT 2.85 DAYS FROM INTAKE TO RECEIPT WAS TYPICAL

	Gift Processing Time			
	Initial Intake	Intake to Batch	Batch to Entry	Entry to Receipt
School A	30 minutes	30 minutes	45 minutes	30 minutes
School B	2 days	—	15 minutes/ 10 records	<2 days
School C	—	1-2 hours	1 hour	2-3 hours
School D	1/5 day	1/5 day	3/5 day	1 day
School E	1/2 day	1/2 day	1 day	1 - 2 days
School F	—	1 hour	4 days	2 days
School G	30 min	1.5 hours	4 hours	1.5 hours
School H	15 mins	10-15 mins	10 mins	1 day
School I	<1 day	<1 day	≤1 day	≤1 day
School J	1.6 hours	4 hours	4 hours	—
School K	90 minutes	≤30 minutes	15-30 minutes	1-2 days
School L	1 day	1 day	30 minutes– 1.5 hour	2 days
School M	—	—	—	—
School N	2 days slow season Up to 12 days peak	≤1 day	4 days	1–2 days
School O	1 hour	2 hours	1 hour	30 minutes
School P	1 day	2 hours	1.5 days	1 day
School Q	1 hour	1 hour	2–3 hours	≤1 day