

NC STATE UNIVERSITY

Metrics and Queue

What Are Gift Agreement Metrics at NC State

What is the gift agreement metrics?

- Measurements that aggregate key gift agreement indicators such as growth, workload, quality, complexity, scale and compliance that helps to strategize and plan. (Donor Services)
- How fast we approve gift agreements or the turnaround time because the DOs will complain. (Leadership)

Notes:

- Counting not only approved agreements, but also compliance in terms of approved agreements actually being signed
- Could also be used as quality control measurement for DOs - for example making sure agreements are actually being used as intended and not just as proposals

How do we track agreements?

- We use the gift agreement queue which there are currently three versions of: (1. What comes into the gift agreement request form (Smartsheets), (2. The Google Queue (Google spreadsheet) and 3. the PDF Version.

Who is the audience for the queue and metrics?

1. Smartsheets Queue - for Donor Services only, for review and input into Google Sheets
2. Google Sheets - for all reviewers and for Donor Services to track gift agreements
3. PDF Queue - for development staff to track gift agreements during the approval process
4. Metrics - for leadership to make strategic decisions

What Do We Want to Measure?

1. The rate of approval
 - a. E.g. % of agreements signed/approved within 30, 60, 90, 120, 180 days of submission
 - b. Median and average approval times for each complexity level
2. The number of agreements received per unit/college
3. # of touch points
4. # of unsigned agreements
5. # type of gift agreement
6. # of holds
7. # of preliminary language requests
8. # of not approved
9. # of agreement per relationship officers
10. # of agreements per phase (where they are)
11. # of returns
12. # New money vs old money agreements
13. # returns due to DS mistakes
14. Days in the queue
15. \$ amount in the gift agreement
16. # agreements approved, vs fully executed
17. Complexity Rating
18. Amendment Reason (tied to form field about why an agreement needs to be amended - error, unable to be administered, ect.)

How We Will Measure?

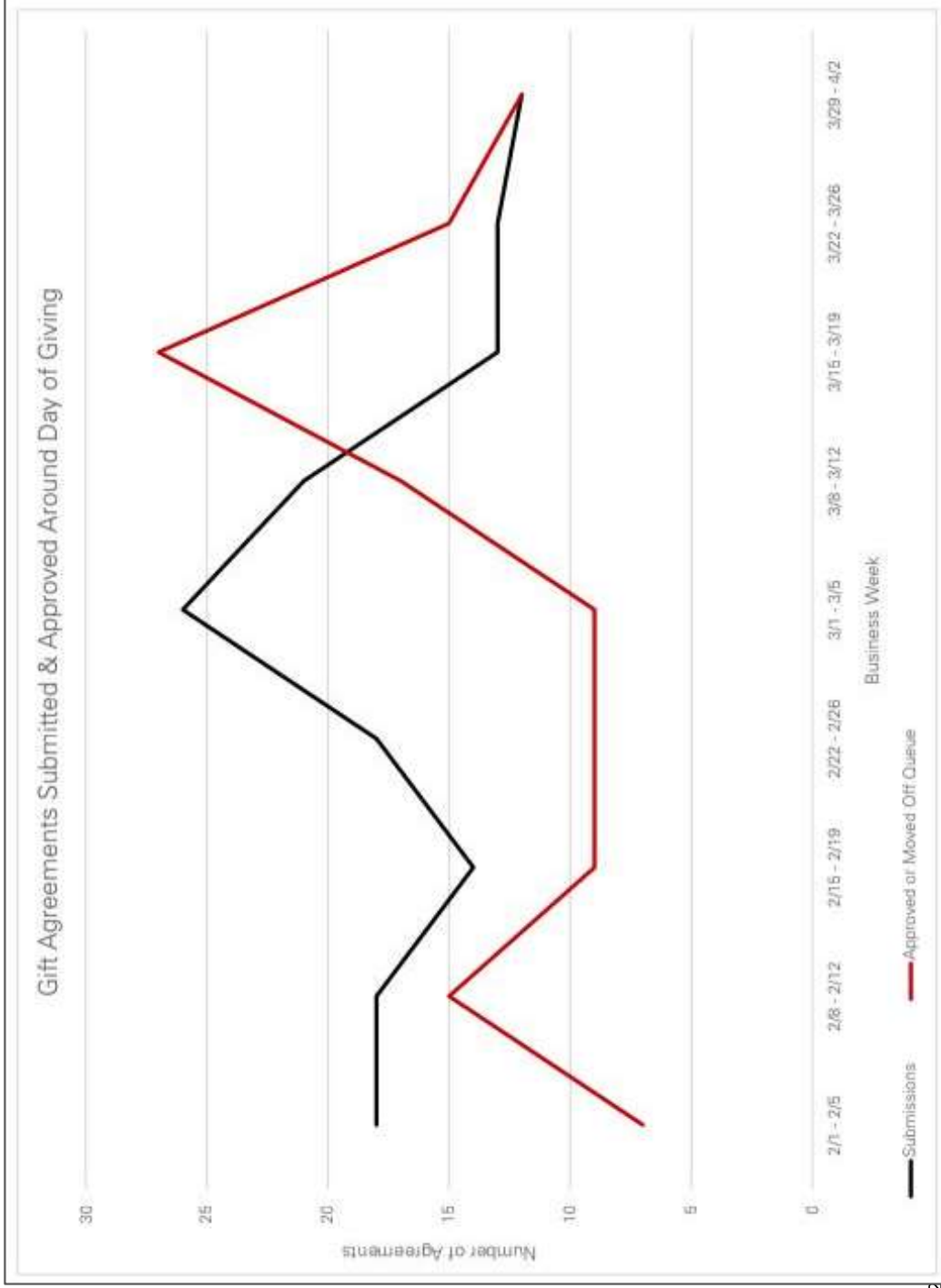
1. The rate of approval (**DocuSign metrics with DS manipulation**)
 - a. E.g. % of agreements signed/approved within 30, 60, 90, 120, 180 pages of submission
 - b. Median and average approval times for each complexity level
2. The number of agreements received per unit/college (**DocuSign metric - form field**)
3. # of touch points (**New DocuSign mechanism?**)
4. # of unsigned agreements (**DocuSign metrics with DS manipulation**)
5. # type of gift agreement (**DocuSign metric - form field**)
6. # of holds (**DocuSign metric - queue section**)
7. # of preliminary language requests (**DocuSign metric - form field**)
8. # of not approved (**DocuSign metric - queue section**)
9. # of agreement per relationship officers (**DocuSign metric - form field**)
10. # of agreements per phase (where they are) (**DocuSign metric - queue section**)
11. # of returns (**New DocuSign mechanism?**)
12. # New money vs old money agreements (**DocuSign metric - form field**)
13. # returns due to DS mistakes (**DocuSign metrics with DS manipulation**)
14. Days in the queue (**DocuSign metric - queue section**)
15. \$ amount in the gift agreement (**DocuSign metric - form field**)
16. # agreements approved, vs fully executed (**DocuSign metrics with DS manipulation**)
17. Complexity Rating (**Donor Services assigns upon submission**)

Complexity Rating

- Donor Services could review complexity factors as agreements come in, triage them to the appropriate complexity rating (Basic, Intermediate or Complex) which would send a notification to the form submitter with a link to an article with definitions/conditions for each complexity level.

Basic Gift Agreement	Intermediate	Advanced (Complex)
<ul style="list-style-type: none"> • Standard language. • Limited preferences. • Templated gift agreements. • Clear documentation. • All information included with request. 	<ul style="list-style-type: none"> • Three preferences. • Missing documentation. • Missing information not included with the request. • More than two reviewing offices. • Basic creation of new language. • Relationship officers might have misinterpreted the donor's request (requiring a few emails back and forth between Donor Services, the relationship officer and the donor). 	<ul style="list-style-type: none"> • More than three preferences. • Missing documentation. • Missing information not included with the request. • More than two reviewing offices. • Preference for language that is illegal, on awardable or impractical to administer. • Request for change of templated language. • Non-standardized gift agreement template. • Relationship officers might have misinterpreted the donor's request (requiring many back and forth between Donor Services, the relationship officer and the donor). • Donor wants references to policies and laws explaining why we cannot place certain language within a gift agreement. • Lots of back and forth communication.

Sample Format of Gift Agreement Metric



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Other Inclusions in DO Dashboard

- Graph showing queue submissions/approvals week to week for the fiscal year to illustrate spikes around major events like Day of Giving, FY and CY end.
- Donor Service Development Metrics:
 - Last Week # of Approved Submissions
 - Last Week # of New Submissions Added
 - Week to Date # of Approved Submissions
 - Week to Date # of New Submissions Added
 - How Many Agreements in Each Stage / Substage (all substage options within each stage are listed in [marketing guide](#) but only a selection of them will be available for the audience of this queue)
 - Stage 1 - Gift Agreement Approval via Donor Services
 - Newly submitted
 - Approved by DS
 - On hold
 - Not approved
 - Canceled
 - Stage 2 - Legacy Page Approval
 - Waiting for Initial Legacy Page Information
 - Legacy Page in Progress with DS
 - Legacy Page Draft In Review with DO
 - In Review with Donor
 - Stage 3 - Gift Agreement Approval with DO & Donor
 - In Review with DO
 - In Review with Donor
 - Approved by DO
 - Approved by Donor
 - Stage 4 - Signature Process
 - Donor Wet Signed, Waiting on Agreement to Route for Internal Signatures
 - Routed for Signature