

**Value of a Bundt Cake- \$14**  
**Value of a Helicopter Ride- \$6,000**  
**Value to a Donor...PRICELESS**

Jennifer N. Johnson, CFRE, Assistant Vice President  
Leah Nicoletti, M.S., Donor Relations Specialist  
Julie Barfield, Donor Relations Coordinator

**CookChildren's**<sup>SM</sup>

# Our Agenda

- Donor Relations at Cook Children's
- Metrics Background
- Metrics and Application

# Donor Relations at Cook Children's

Jennifer Johnson – AVP, Donor Relations



# Donor Relations at Cook Children's

Julie Barfield- Donor Relations Coordinator



# Donor Relations at Cook Children's

Leah Nicoletti- Donor Relations Specialist



# Donor Relations at Cook Children's

- Geraldine Williams – Director, Community Programs
  - Jennifer Poe – Community Programs Coordinator
  - Bailey Langdon – Special Events/Fundraising Coordinator

# Metrics Background

- *Measuring Up: Mindful Metrics to Prove Your Worth in Tough Times and Good Times*
- Lynne Wester
- 2009 ADRP International Conference
  - Define items to track
  - Assign a point value to each item
  - Assign a monetary value to each point
  - Let's do the math!

# Define Items to Track

- Spreadsheet of Donor Relations Touches
- All touches divided into 4 main categories (examples shown for each category from March 2011-March 2012)
  - **Mailings**
  - **Recognition Events**
  - **Stewardship Reports**
  - **Mega Stewardship**

# Assign a point value to items

## 2 Tiered Approach

### Tier 1 - Donors

- 5 points – Major Donors
- 4 points – Leadership Donors
- 3 points – Midlevel Donors
- 1 point – Annual Fund, Entry Level Donors, Third Party Event Donors

# Assign a point value to items

## 2 Tiered Approach

### Tier 2 - Action

- 5 points – Face to Face/ 1 on 1 Contact
- 4 points – Selective Audience, but not 1 on 1
- 3 points – Time Consuming and Personalized
- 1 point – All Donors or Mass Communications

# Monetary value per point

Using Lynne Wester's model, we use \$9.00 per point as the monetary value, since we raise \$18 million annually.

**\$9.00**

# Formula

- Multiply Tier 1 x Tier 2 for your point value

$$\text{Tier 1 x Tier 2} = \text{A}$$

- Multiply A by the number of touches

$$\text{A x touches} = \text{B}$$

- Multiply B by \$9.00 to get monetary value

$$\text{B x \$9.00} = \text{monetary value}$$

# Let's do the math!: Mailings



Birthday Cards:  
622 cards x 9 points  
x \$9.00 = **\$50,382**



Valentine's Day Cards:  
367 cards x 9 points x  
\$9.00 = **\$29,727**

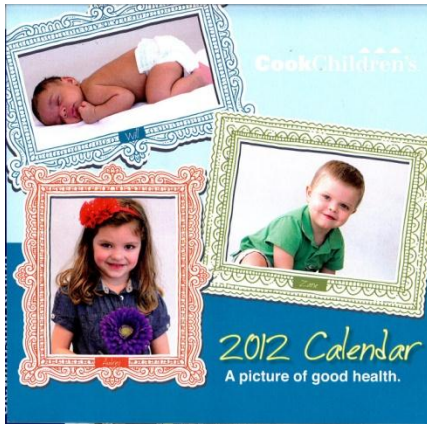


Mother's/Father's Day  
Cards:  
274 cards x 9 points x  
\$9.00 = **\$22,194**



Thanksgiving Cards:  
1,498 cards x 1  
point x \$9.00 =  
**\$13,482**

# Let's do the math!: Mailings



Calendar:  
481 mailed x 1 point  
x \$9.00 = **\$4,329**



First Time Donor:  
1,033 postcards x  
1 point x \$9.00 =  
**\$9,297**



Magazine:  
37,560 mailed x 1 point  
x \$9.00 = **\$338,040**

Newsletter:  
1,331 mailed  
x 20 points  
x \$9.00 =  
**\$239,580**



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# Let's do the math!: Mailings

**Mailings Total**

**\$662,031**

# Let's do the math!: Events



## Colonial Skybox:

927 invites x 9 points x \$9 = \$75,087

506 attendees x 15 points x \$9 = \$68,310

300 RSVPs x 15 points x \$9 = \$40,500

397 RSVPs x 3 points x \$9 = \$10,719

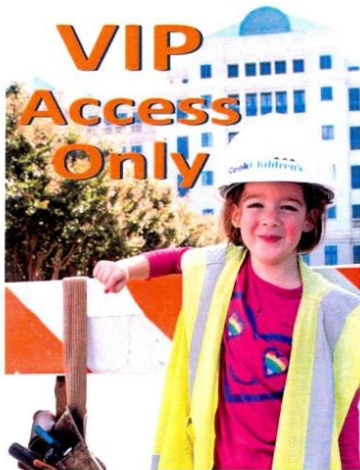
Colonial Skybox Grand Total:

**\$194,616**

# Let's do the math!: Events

## Bundt Cake Deliveries:

124 cakes x 25 points x \$9 = **\$27,900**



## Hard Hat Tours:

110 verbal invitations x 20 points x \$9 = \$19,800  
110 post card reminder x 12 points x \$9 = \$11,880  
114 attendees x 20 points x \$9 = \$20,520  
70 photo card follow up x 12 points x \$9 = \$7,560

Hard Hat Tour Grand Total:

**\$59,760**

# Let's do the math!: Events



## Ribbon Cutting:

236 invitations x 12 points x \$9 = \$25,488

150 attendees x 16 points x \$9 = \$21,600

Ribbon Cutting Grand Total:

**\$47,088**



## Dodson Specialty Clinics Dedication:

400 invitations x 12 points x \$9 = \$43,200

120 attendees x 16 points x \$9 = \$17,280

Dodson Specialty Clinics Dedication Grand Total:

**\$60,480**

# Let's do the math!: Events

## Leadership Donor Dinner:

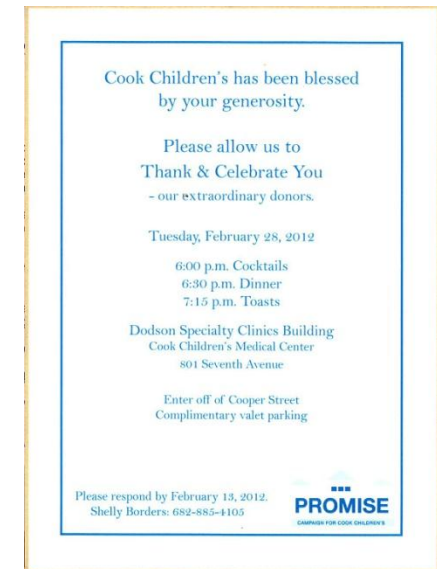
85 invitations x 15 points x \$9 = \$11,475

72 attendees x 25 points x \$9 = \$16,200

60 donor follow-up x 25 points x \$9 = \$13,500

Leadership Donor Dinner Grand Total:

**\$41,175**



# Let's do the math!: Events

**Events Total**

**\$431,019**

# Let's do the math!: Reports

Stewardship/Endowment Reports:  
50 reports x 16 points x \$9 =  
**\$7,200**

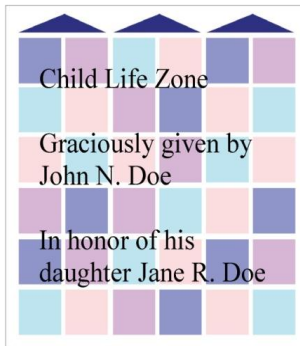


CEO Thank You Letters:  
118 letters x 16 points x \$9 =  
**\$16,992**



# Let's do the math!: Reports

## Naming Opportunity Proposals:



DONOR SIGN  
10'X10'

58 proposals x 16 points x \$9 = \$8,352

58 sign verbiage options x 20 points x \$9 = \$10,440

58 signage confirmations x 20 points x \$9 = \$10,440

Naming Opportunity Proposals Grand Total:

**\$29,232**

# Let's do the math!: Reports

**Reports Total**

**\$53,424**

# Let's do the math!: Mega Stewardship



**Helicopter Ride, Trustee Emeritus, Groundbreaking Ceremony**

# Let's do the math!: Mega Stewardship



**Valentine's Day Party, Thanksgiving and Christmas Parties,  
Summer Camp Attendance**

**Let's do the math!:  
Mega Stewardship**

**Mega Stewardship Total  
Priceless...because she is!**

# GRAND TOTAL

**\$ 1,146,474**

- This is just a sampling of 17 stewardship touches in 1 calendar year. Think of what our grand total would be if we tracked all 56 touches!
- What is your total?

# Value of Stewardship

**Questions?**

# Contact us

**Cook Children's  
Health Foundation  
801 Seventh Avenue  
Fort Worth, TX 76104  
682-885-4105**

**[www.cookchildrenspromise.org](http://www.cookchildrenspromise.org)  
[foundation@cookchildrens.org](mailto:foundation@cookchildrens.org)**

Lynne Wester's original  
presentation can be found at:  
**[www.donorrelationsguru.com](http://www.donorrelationsguru.com)**

**Jennifer Johnson**

**[jennifer.johnson@cookchildrens.org](mailto:jennifer.johnson@cookchildrens.org)**

**Leah Nicoletti**

**[leah.nicoletti@cookchildrens.org](mailto:leah.nicoletti@cookchildrens.org)**

**Julie Barfield**

**[julie.barfield@cookchildrens.org](mailto:julie.barfield@cookchildrens.org)**

**CookChildren's**<sup>SM</sup>