

A close-up photograph of a pencil lying diagonally across a sheet of graph paper. A ruler is also visible, running parallel to the pencil. The background is slightly blurred, showing the grid lines of the paper and the texture of the pencil's body.

MEASURING UP:

**PROVING YOUR WORTH IN TOUGH
TIMES AND GOOD TIMES**

Lynne M. Wester

Metrics- The 5W's and an H



- What are they?
- Why are they useful?
- Who uses them?
- When are they best implemented?
- Where do they apply?
- How do I implement them in my office?



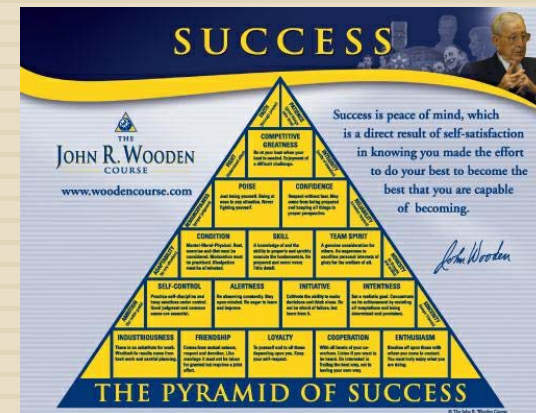
Metrics- What are they?

- A tool for measuring performance
- Buzzword?
- Three Parts of Effective Metrics
 - ▣ Establishing critical processes/ donor requirements
 - ▣ Developing measures
 - ▣ Establishing targets which the results can be scored against



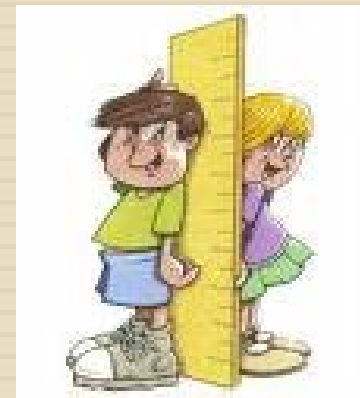
Metrics- Why are they useful?

- Justify your existence
- Helps during reviews
- Tangible results of your work
- Allows for justification of extra staff
- Leadership/ Administration LOVE them!



Metrics- Who uses Them?

- Leadership/Administration
- Development Officers
- Advancement Services
- Almost comprehensive across organizations



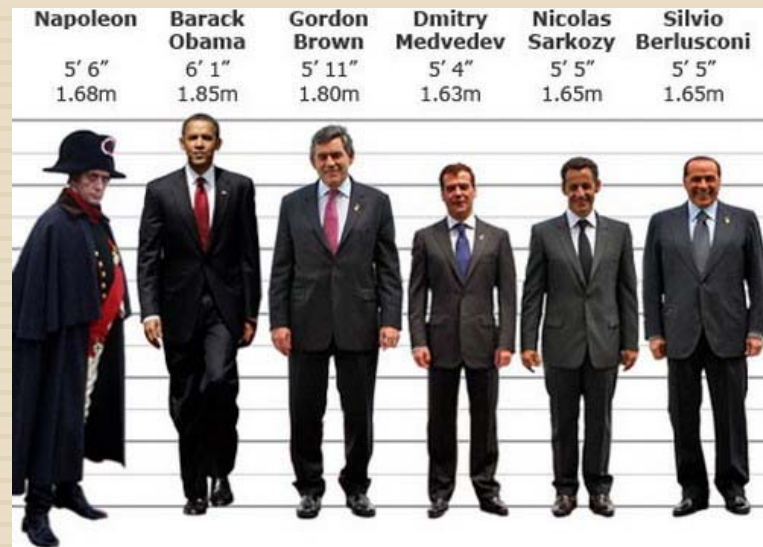
Metrics- When are they best Implemented?

- Performance Review Time
- Strategic Planning
- Leadership Planning
- My opinion- EVERY DAY!



Metrics- Where do they apply?

- Every Day
- Every Contact
- Every Strategic Effort
- Every Time



Metrics- How do I apply them in my Office?

- Strategically
- In Tandem with Leadership
- In stages, using smart tactics and...
- At your comfort level!



Metrics and Donor Relations

- Challenges
 - ▣ Subjective
 - ▣ Math... 😊
- Opportunities
 - ▣ Staff
 - ▣ Budget
 - ▣ Impact

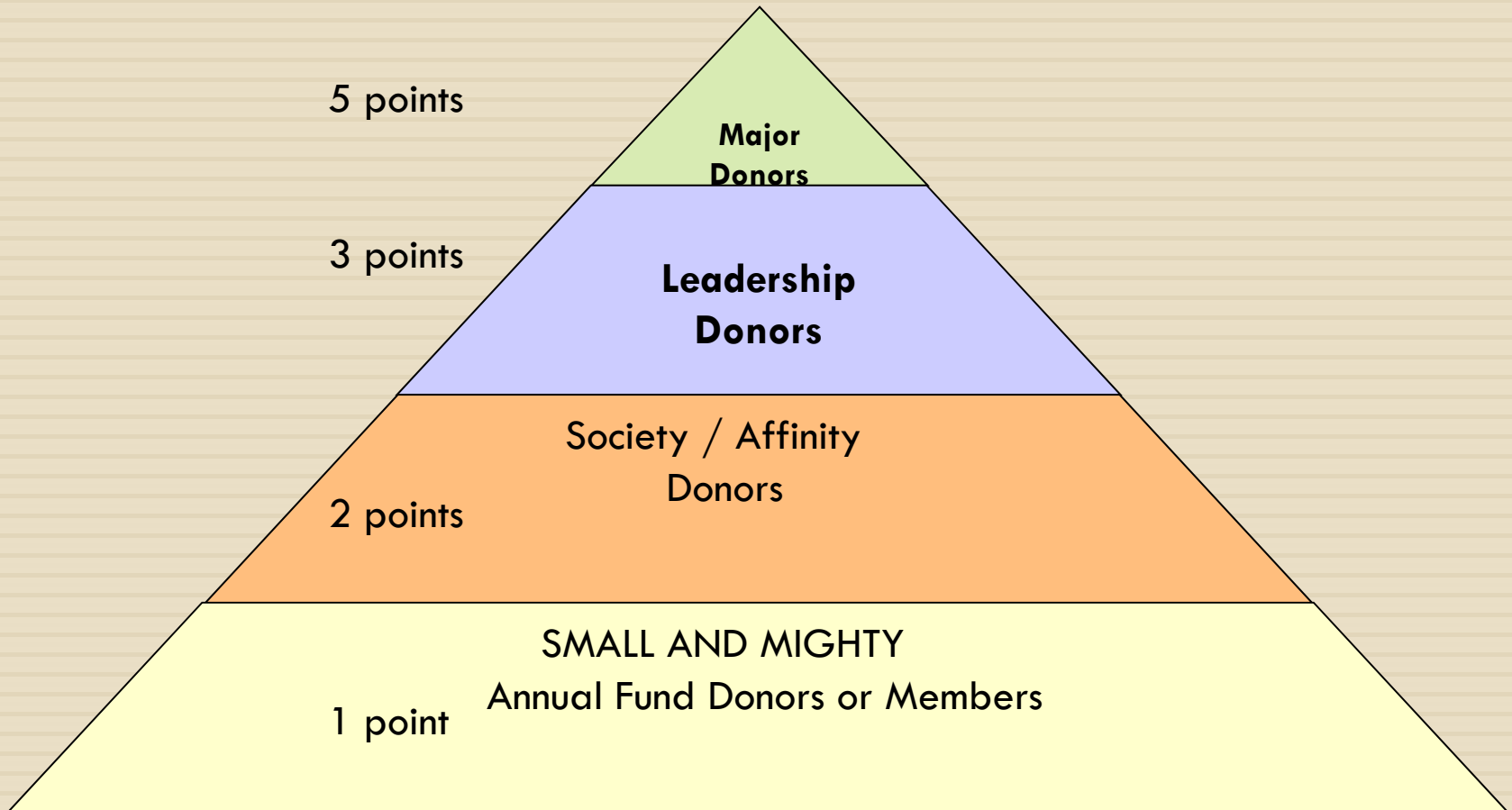


The Plan

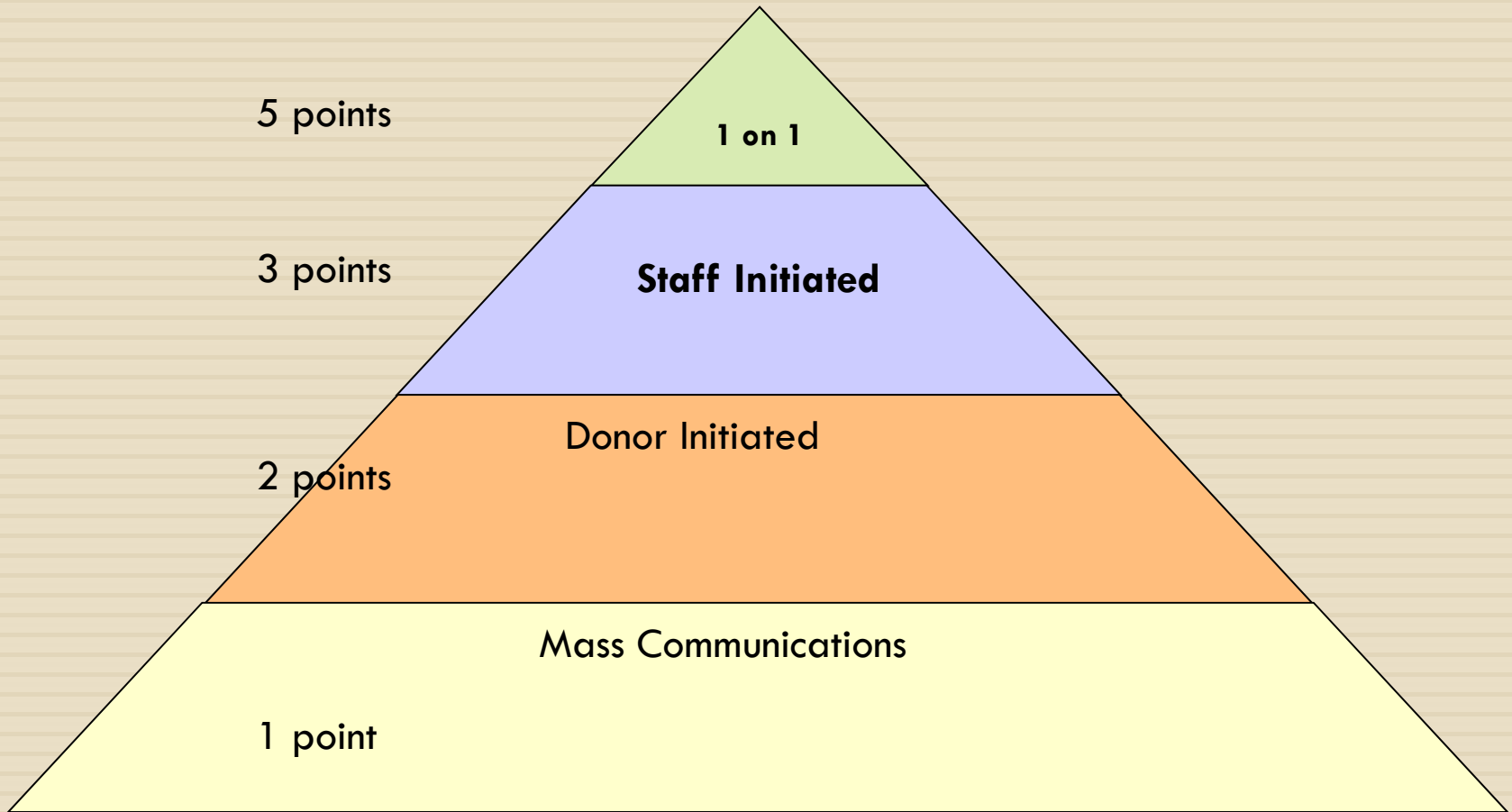


- Tiered Approach
 - Just like Development Officers
 - Allows for Prioritization
- Opportunities
 - Staff
 - Budget
 - Impact

The Tiered Approach- Step 1

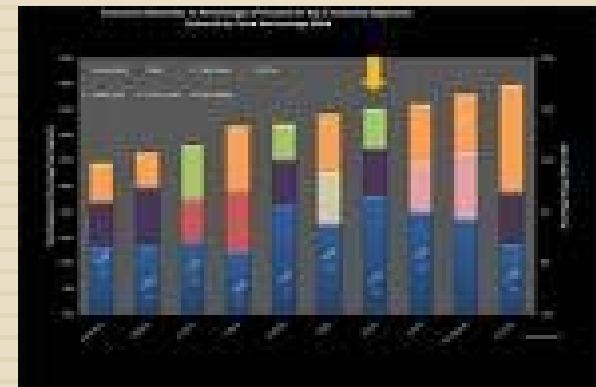


The Tiered Approach- Step 2



Items to Track

- Acknowledgments
- One on one Communications
- Reports
- Events
- Digital Communications



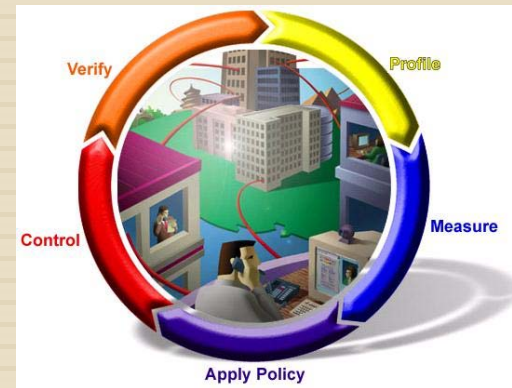
Tracking Methods

- Simple Tick Sheets
- Excel Spreadsheets
- Monthly Totals
- Online Forms
- Survey Feedback



Items to Track

- One on one Communications
 - Emails
 - Phone calls
 - Praise



Items to Track

- Reports
 - Survey Response rate and satisfaction
 - How you handle feedback
 - State of the Endowment Pieces
 - Quality Enhancements



Items to Track

- Events
 - Invitations
 - RSVPs and phone calls for info
 - Conversations at event
 - Repeat guests
 - Follow up- Photo sends, articles, etc.



Items to Track

- Digital Communications
 - Stewardship Videos
 - Emails to and from Donors
 - Information Acquisition and Updates
 - Online Student Bio Forms
 - Website



Let's Do The Math!!- Examples

- **Donor Bill of Rights-** (donor)1 point x (type)1 point x 20,000 gifts = 20,000 points total
- **\$1M Donor Event-**
 - Invite (donor) 5points x (type) 3 points x 250 invites = 3750 points
 - Follow Up (donor) 5 points x (type) 5 points x 45 follow up photos sent = 1125 points
- **Stewardship Video-** (donor)1 point x (type)1 point x 1500 emails= 1500 points
- **Gift Agreement Drafting-** \$2 million dollar endowed chair x 15%= \$300,000 credited to you!
- **PS=** You can have EXCEL do ALL the Math for you!!

So.... If Every Point = \$5

- **Donor Bill of Rights-** 20,000 points total x \$5 = \$100,000
- **\$1M Donor Event-** 3750 points + 1125 points x \$5 = \$24,375
- **Stewardship Video-** 1500 points x \$5 = \$7,500
- **Gift Agreement Drafting-** \$300,000

- **Total- \$431,875!!!**
- PS= You can have EXCEL do
- ALL the Math for you!!

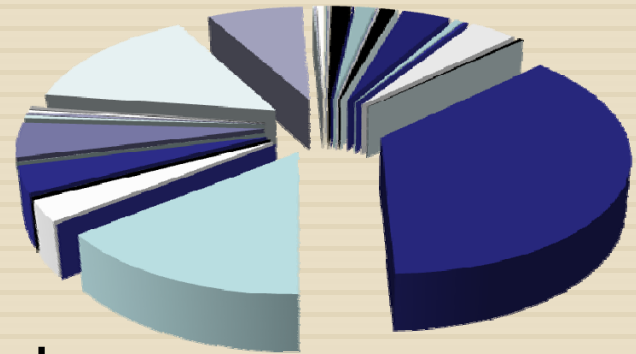


No One at My Organization...

- Will Go for this!
- What are my options??
 - ▣ Hours
 - ▣ Stats
 - ▣ Cool tool
 - ▣ Decide on a commonality

Reporting- Measurable Results

- Comprehensive Contacts
- Point Values Year to Year
- Donor feedback
- Percentage of Total Dollars Raised
- Leadership Prefers Charts and Graphs and Comparisons



Tips and Tricks



- Start Small
- Set aside Time at Weekly or Monthly Intervals
- Make it a Personal Priority
- Get Buy In and Feedback from Leadership
- Be Strategic!

Questions? Comments?



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Thank you!!