



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## Metrics:

*Tools for Measuring Success in Donor Relations*



**Meghan Davison**

Senior Vice President  
CCS Fundraising



**Elizabeth Hormann**

Vice President  
CCS Fundraising



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

# Metrics: Tools for Measuring Success in Donor Relations

Meghan Davison  
Elizabeth Hormann  
*CCS Fundraising*



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## About CCS Fundraising

Fundraising Consulting and Management Services	Serve More than 500 Nonprofit Organizations Each Year	400+ Permanent Professional Fundraising Staff
Directly Managing \$15B in Campaign Goals	 Celebrating 75 Years of Service	More than a Dozen Offices Located Across the Globe
Dedicated Departments in Analytics, Prospect Research, Custom Learning, Strategic Planning, Marketing and Communications, and More	90% Business from Repeat Clients and Referrals	Experienced in supporting Donor Relations teams in pursuit of sustainable growth and execution

Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



## Relevant Experience



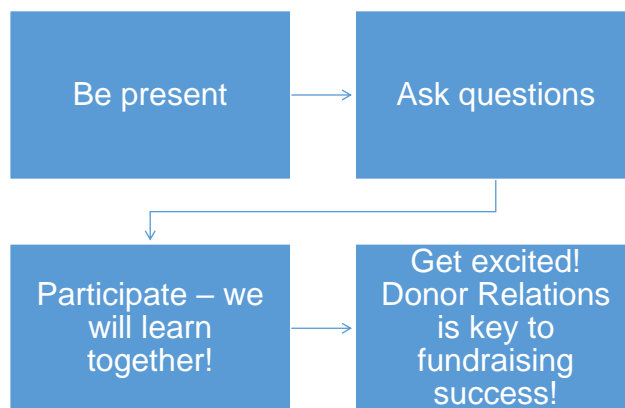
Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## Ground Rules



Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## Today's Agenda

1. Role of Donor Relations

2. Philanthropic Landscape

3. Introduction to Metrics

4. Interactive Discussion

5. Role of Stewardship

6. Questions / Comments

Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



# Role of Donor Relations



Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising

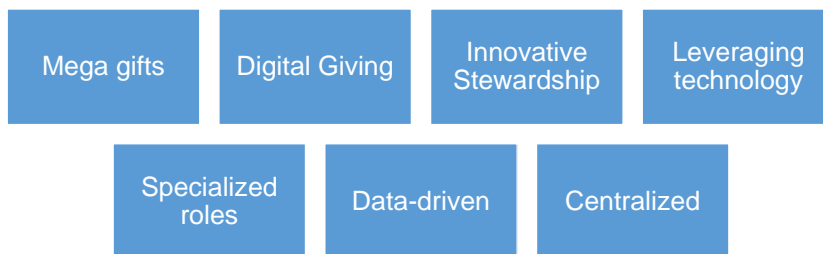




ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## Philanthropic Landscape



Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## Introduction to Metrics

**For the team, metrics drive activity and strategy, and will help:**

- Set Goals
- Assess Progress
- Build Accountability
- Identify New Opportunities
- Gain a Better Understanding of our Donors
- Determine Which Techniques Work Best

**For managers and leadership, metrics are a management tool, and will help:**

- Clarify and focus thinking; sets expectations
- Establish a framework for predictive planning and action
- Become the basis for performance evaluation
- Provide content for effective dialogue
- Empower team and drive their activity
- Provide a way to evaluate resources and prioritize activity
- Provide process control which enables outcome control
- Help inform future planning

Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## Introduction to Metrics

Before getting started – define your values and questions:

Values: *we believe our work is...*

- [Ambitious]
- [Engaging]
- [Transformational]

Questions: *to ensure our work embodies our values...*

- Are we on target to meet goals?
- Are all gifts acknowledged timely and accurately?
- Are we working efficiently with donors at all levels?
- Are we engaging leaders effectively?
- Are we engaging our colleagues across teams effectively?
- Are we focused on stewarding top prospects?
- Are our messages clear, inspirational, and consistent?

Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



## Introduction to Metrics

How might we define key performance indicators (information to answer questions)?

Drivers (factors that contribute to success)

- Time from gift to acknowledgement
- # of acknowledgements
- # of impact reports + time to execute
- # of stewardship plans + time to develop

Gauges (measures of efficacy)

- Donor retention rate
- Donor upgrade rate
- % of major gift donors with stewardship plans
- Donor satisfaction survey

Retroactive (progress using historical data)

- YOY volume and statistics

Outcomes (progress towards goal)

- \$ raised
- Culture of philanthropy

Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## Introduction to Metrics

How do you track metrics? What are the tools used?

- CRM
- Encourage and support self-tracking
  - Project management software
- Dashboards

Sample metrics to start with:

- Date of gift
- Date of acknowledgement
- # of gifts
- # of acknowledgements
- Retention rate
- Upgrade rate
- # of stewardship plans

Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## Interactive Discussion

What metrics do you currently track?

What tools do you find most helpful?

What are some common pitfalls?

Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising

# Case Study: Donor Relations Assessment



	DONOR RELATIONS						STRATEGY	CAPACITY BUILDING			OTHER
	Ack.	Reporting	Recognition	Engagement	Stewardship	Giving Societies	Strategy	Learning + Development	Capacity	Efficacy	Other
Goals / Tactics											
Outputs											
KPIs (short term)											
KPIs (long term)											
Outcomes											
Impact											

Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## Introduction to Metrics

### Individual goals help:

- Focus work
- Develop strategies
- Track progress
- Achieve success

### Team goals help:

- Encourage collaboration
- Share responsibility
- Track Progress
- Achieve success



Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising





ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## Interactive Discussion

What does this data mean?

# Gifts	# Ack Sent	# Newsletters Sent	Time Between Gift & Ack.	# Donor Engagement Events	Donor Renewal Rate	Donor Upgrade Rate
21,134	18,344	63,747	4 days	12	41%	11%

Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## Interactive Discussion

What does this data mean?

# Major Donors & Prospects Identified	% in Discovery	% in Cultivation	% in Solicitation	% in Stewardship	# Stewardship Plans in Place	# of Giving Societies
1,000	10%	20%	40%	30%	99	9

Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

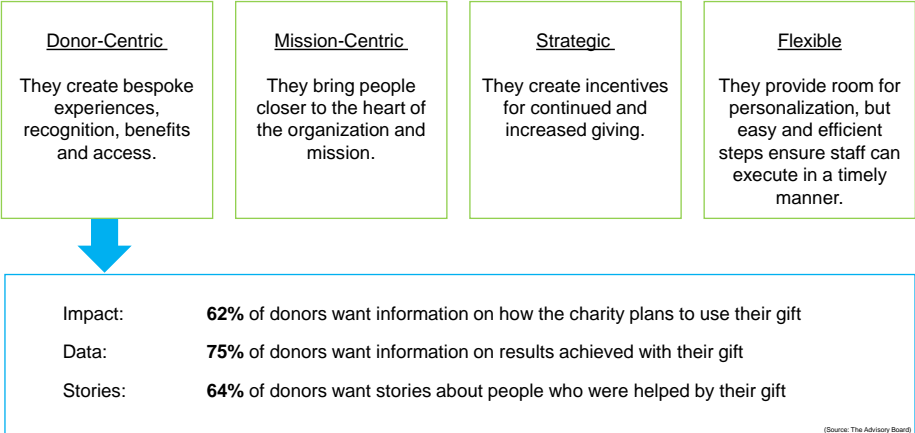
## Introduction to Metrics:

### Implementing Metrics: Keys to Success

- Begin by tracking the metrics that can be measured easily and add others at future date
- Reference (create) data entry guidelines
- Create realistic goals using projections based on historical data
- Establish interim benchmarks (e.g. quarterly, monthly, etc.) to make the objectives achievable and monitor progress on a regular basis
- Invest in training to support the increased level of tracking and data entry (as necessary)
- Phase-in metrics over time (12 to 24 months+) acknowledging a change in process takes time and there will be lessons learned and adjustments made

Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising

# Role of Stewardship



Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising

# Case Study: Stewardship



Stewardship is a key aspect of principal gift strategy, as many principal gifts are preceded by smaller gifts and/or may be followed by even larger gifts.



Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

## Questions / Comments

Metrics: Tools for Measuring Success in Donor Relations | CCS Fundraising



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS