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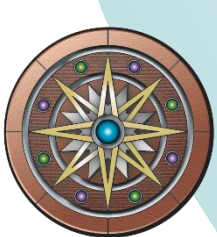
BUILDING
RELATIONSHIPS
FOR GOOD

Measures of Success for Donor Relations and Stewardship

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Journal of
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Journal of Donor Relations & Stewardship

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Developing Evidence-based Practice within Donor Relations and Stewardship

By Anne Manner-McLarty

The evidence-based practice model has been applied in a number of fields, including health sciences, human resources, management and governmental policymaking. Evidence-based practice is characterized by the synthesis of knowledge coming from an expert practitioner; the values and preferences of the constituent, in this case the donor; and evidence provided by research from the field of practice. This article explores the translation of this model for the purposes of donor relations and stewardship practice, considers current impediments to realizing a model of this sort, and provides an overview of applicable research methods that could be used to build a library of research evidence appropriate to donor relations and stewardship. The author calls for an iterative design process for donor relations and stewardship programs and the open sharing of research findings as an ethical obligation of the nonprofit industry.

This article points to the need for sufficient relevant research to advance donor relations and stewardship as an evidence-based practice. This research should focus on the efficacy of donor recognition and stewardship strategies in motivating donor support and the efficiency with which those strategies are carried out. Evidence-based practice within donor relations and stewardship would use research to inform the design of the programs organizations use to attract, motivate and retain donors.

Content:

- Evidence-based practice in terms of donor relations and stewardship
- Factors impeding the development of evidence-based practice
- The importance of sharing of evidence within the nonprofit sector
- Creating a framework for evidence-based practice
- Research and evaluation terminology and methods
- The role of program evaluation in an iterative design process

Glossary:

- Evidence-based Practice: Combining best evidence found in relevant research that has been conducted using sound methodology with the practical expertise of the professional and the values, expectations, concerns and preferences of the donor or group of donors. (Derived from the common definition of evidence-based medicine accredited to Sackett, et al used in clinical healthcare fields)
- Iteration: Repetition of a practice or innovation as a means of obtaining successively closer approximations to the solution of a specific problem. Refinement of an idea by trial, evaluation and revision.

Anne Manner-McLarty is the managing editor of the *Journal of Donor Relations & Stewardship*. In 2011 she founded Heurista, a leading resource for consulting specific to donor relations and stewardship, with particular expertise in donor recognition program design and implementation. She is a long-standing member of the Association of Donor Relations Professionals and served on the ADRP board from 2012 to 2014.

The *Journal of Donor Relations & Stewardship*, known simply as the Journal, is a serial publication specific to issues of donor relations and stewardship for fundraising organizations. It explores the role of stewardship practice within the larger perspective of nonprofit operations. The content is set apart from other offerings now available to the field in that it is focused on theory over day-to-day practice and encourages self-reflection and professional debate.

Book 2: Measurement will be available early 2017. Contributing authors include Kay Coughlin, Julia Emlen, Roberta O'Iara, Anne Manner-McLarty, Mark Koenig and David Palmer. Please visit www.journaldrs.com to pre-register for your copy.



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Journal of Donor Relations & Stewardship



Donor Relations and Stewardship Metrics Program Planning

1. What tasks are accomplished under the heading “donor relations and stewardship” at your organization?
2. What are the objectives of this work and how do these objectives align with department, division and institutional goals?
3. How can success toward donor relations and stewardship objectives be measured?

What might be measured?	Possible method	Internal	External	Output	Input

4. Are there any similar processes for metrics already in place at your organization?

What is measured?	Method used	Database Used	Reporting Model

5. What impediments are likely? What are possible solutions?
6. What timeframe is anticipated for the project?
 - Vision-setting
 - Create data gathering, record keeping, analysis and reporting systems
 - Early data, analysis and reporting
 - Ongoing data, analysis and reporting
 - Change, if warranted
 - Reiteration
7. Who authorizes this work? Who are the stakeholders in this process? To whom will the findings be reported?
8. What are opportunities and limits for taking action relative to the findings?

Orientation

Internal <•> External

Output <•> Outcome

Definitions

- **Measurement**- the size, length, or amount of something, as established by measuring
- **Metrics**- an repeatable method of measuring to inform decision-making; may require the scaling of intangibles
- **Analysis**- a detailed examination of data as a basis for discussion or interpretation
- **Actionable**- the opportunity for change based on evidence provided by analysis

Prerequisite Questions

- Why is data needed?
- What will be measured?
- Is scaling required? What format is best?
- Who will record, report and analyze the data?
- When will meaningful data be available?
- How will the metrics program be structured so that it is cost-effective and repeatable?
- Are we willing and able to take action?

Impediments

- Lack of clarity about the objectives of donor relations and stewardship
- Insufficient data resulting from either inconsistent or nascent data-gathering
- Lack of organizational commitment to sustain the metrics program development process
- Unreasonable expectation about time commitment required to develop a program
- Wavering commitment to change based on insight gained from the metrics

Is change an option?

Action is taken

- To improve
- To correct
- To prevent
- To change internal opinion/behavior
- To change external opinion/behavior

Implications

- True of all donors
- True of all of our donors
- True of all donors like this
- True of this donor

Data-Driven Culture Types

Type	Characteristics
Culture of Champions	There is support from the organization's leadership and motivational members of the staff that embrace being data driven
Culture of Testing	There is a belief that measurable improvements can be made through iteration and testing throughout the organization
Culture of Change	There is a natural curiosity to try new things and take calculated risks to adapt to changing conditions in the nonprofit sector
Culture of Sharing	There is a willingness to share data and collaborate to achieve better results and a disdain for creating or maintaining data silos
Culture of Growth	There is a focus on continuous improvement where success is measurable and visible across all levels of the organization
Culture of Agile	There is empowerment of people to interact and collaborate that allows them to adapt and respond to a changing environment
Culture of Data	There is a high value placed on data and it is a fundamental driving force to support and validate decisions at the nonprofit

Steve McLaughlin, *Data Driven Nonprofits*

Research Types

Gathering Objective Donor Data

- Census
- Mapping
- Poll
- Datagraphic Survey

Research Types

Gathering Donor Opinion

- Opinion Survey
- Anecdote
- Interview
- Focus Group

Research Types

Donor Attitude Testing

- Aided Recall
- Unaided Recall
- Perception Mapping

Research Types

Measuring Donor Behavior

- Direct Engagement
- Indirect Engagement
- Proxy Behaviors

Research Types

Predicting Donor Behavior

- Predictive Scoring
- Predictive Models
- Profile
- Avatar
- Journey Mapping

Research Types

Product and Service Testing

- Variable Testing
- Maximum Scoring Difference

Research Types

Evaluation of Programs, Products, or Services

- Program Evaluation
- Project Evaluation
- Formative Evaluation
- Summative Evaluation

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