

## **GENERAL SESSION 2: Establishing Meaningful Measures of Success for Donor Relations and Stewardship**

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#### **Session Description:**

Metrics is a hot topic within all fundraising fields, and there have been frequent calls for measurement strategies for donor relations and stewardship. To date, however, few organizations are legitimately underway with a metrics program specific to donor relations and stewardship. There is a substantial debate about what should be measured and how, with many arguing it is harder to identify specific donor responses as outcomes of the donor relations strategy.

In an effort to better understand the process of designing a meaningful measurement program, participants will consider the prerequisites to any metrics program, explore the types of measurement systems available, and forecast possible impediments and solutions. Participants will have the opportunity to consider and debate the differences in analyzing internal metrics, such as volume and type of activities performed by staff, versus external metrics, such as donor preference or behavior outcomes as a result of donor relations activity. A worksheet and reference article providing definitions and examples will be provided. Here are just a few of the questions to be discussed during the session:

- Why is data needed? Is there sufficient clarity about the goals of donor relations and stewardship?
- What will be measured? What is the potential for change based on insight gained from the metrics?
- Who will record, report and analyze the data? Are the systems for data gathering and reporting in place?
- When will meaningful data be available? Is the program meant to be ongoing and is it sustainable?

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Anne Manner-McLarty is managing editor of the Journal of Donor Relations & Stewardship and lead consultant for Heurista, a consulting firm focused on donor relations strategy and donor recognition program planning. Anne has been an active member of ADRP since 2005, having served on the ADRP board 2012-2014. She is a frequent webinar and session presenter for ADRP and other professional organizations.

**Knowledge Domains:** Current and Prospective Donor Research, Leadership and Management, Ethics and Accountability

**Keywords:** Metrics, Donor Retention, Measuring Success, Strategy, Data