

# **UNTANGLING METRICS!**

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# QUESTIONS WE WANT TO ANSWER TODAY

- **Is there a “gold standard” of metrics?**
- **Do you evaluate primarily on metrics or do you include other behaviors?**
- **How does your organization encourage “team play”?**
- **How can you dialogue better about metrics?**

# WHAT DO YOU THINK ARE THE MOST POPULAR METRICS?

WITH THANKS TO BENTZ WHALEY FLESSNER

# **BREAKING DOWN THE TOP THREE: DOLLARS**

- **Just lead? Lead + team?**
- **Made ask or facilitated ask? (e.g. board member asks)**
- **How count multi-year pledges, LOIs, deferred gifts**
- **Valuing bequests**
- **36-month rolling average**

# **BREAKING DOWN THE TOP THREE: VISITS**

- **Moves vs. touches**
- **Facilitated (e.g. ED makes visit)**
- **Secondary role (mentor, mentee, staffing volunteer)**
- **Unique visit vs. seeing the same donor**
- **Content and context of visit text (contact reports!)**
- **Outlining next steps makes a visit meaningful**

# BREAKING DOWN THE TOP THREE: ASKS

- Just lead? Lead + team?
- Made ask or facilitated ask?
- Value of declines
- Bequest asks
- Delta between ask amount and gift amount

# METRICS SHOULD BE PERSONALIZED FOR YOUR ORGANIZATION & INDIVIDUAL STAFF

- Tenure
- Area of prospecting
- Maturity of organization
- Experience of fundraiser
- Supported by data
- Consensus of fundraiser and leadership\*

## WHAT IS THE 'GOLD STANDARD'?\* 'SWEET SPOT'?\*\*

- Median number in portfolio: 125
- 60% of development officers do 100/calls per year
- 40 asks

\*Bentz Whaley Flessner study

- 125 visits
- 21 asks
- 13 funded

\*\*Eduventures



## **BEST PRACTICES? (BENTZ WHALEY FLESSNER)**

- **There should be an average of 12-15 visits per month**
- **Development officers should visit approximately 50% of portfolio annually**
- **1/3 of a DO portfolio should be in the solicitation stage**
- **Full time major gift officer should raise \$1M annually (average)**

# **CORE COMPETENCIES & CORE VALUES**

HOW DO YOU ASSESS THESE?

# METRICS SHIFT! 2005 VS 2014

(BENTZ WHALEY FLESSNER)

2005 (in order of popularity)	2014 (in order of popularity)
Total dollars raised	Total dollars raised
# of face-to-face visits	# of face-to-face visits
# of contacts	# of asks
# of asks	# of gifts closed
# of gifts closed	# of stewardship calls
# of discovery calls made	# of prospects identified
# of new prospects identified	# of discovery calls made
# of stewardship calls	# of cold calls made
	# of moves

# OBSTACLES THAT PREVENT SUCCESS

- Spending too much time on other stuff
- Dismissing ROI (assess during a pilot period)
- Hello, can you say “administration”?
- INEFFECTIVE professional development &/or mentor
- Lack of organizational systems
- Inability to grasp the power of special gift fundraising
- Ignoring your organization’s “middle”
- Punitive culture leads to “gaming the system”
- Too much paperwork to assess metrics
- Excuses as assigned (let’s name ‘em!)

# **DIALOGUE:** PROS, CONS & QUESTIONS ABOUT BEST PRACTICES

**THANK YOU**

Taking the time to untangle metrics gives you  
objective measurements to build fundraising skillsets

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