

# Fundraising Metrics and Performance

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# Business (and Fundraising) Success Factors

## Economic Conditions

Can't be controlled  
Can be understood

## Leadership Effect

Character of leadership  
Resulting in an engaged workforce

## Business Model

Controllable factors  
Process, staffing, performance

# Business Model Levers



## Value of Constituency

Who are we seeing?

## Performance

How are we converting the value to gifts?



## Staffing

Are we right-sized and aligned?

# Business Model Levers

Metrics and Officer Activity



## Value of Constituency

Who are we seeing?

## Performance

How are we converting the value to gifts?



## Staffing

Are we right-sized and aligned?

# We give like we consume – *Informs Metrics Calibration*

Transaction type	Product Examples	Interaction method	Consumer need	Gift Equivalent
Small Dollar. Low Risk.	Books. Shoes. Consumables.	One-to-many. Online shopping.	Consistency. Predictability. Value. Satisfaction	Annual giving. Direct response.
4- and 5- figure purchase. Medium risk. Need for validation.	Mobile phones. Cars. Insurance.	One-to-one at point of transaction, one-to-many support.	Talk to a person to part with that much money. But, not looking for deep relationship yet.	Mid-level or Leadership Annual Giving
6-figure to low 7-figure. Only a few times per lifetime	Real Estate	One-to-one to learn customer interests. Align. Show examples. Help with transaction.	To be heard. To find a solution that meets their interests.	Major gifts
High 7-figure and above. Transformation motivated	Companies - mergers and Acquisitions. New ventures	Very deep access into company. Making a case for investment.	To determine if the investment will produce the desired effect and return.	Principal gifts

# Interaction Calibration

## Principal Giving

Signature programs  
Complex assets

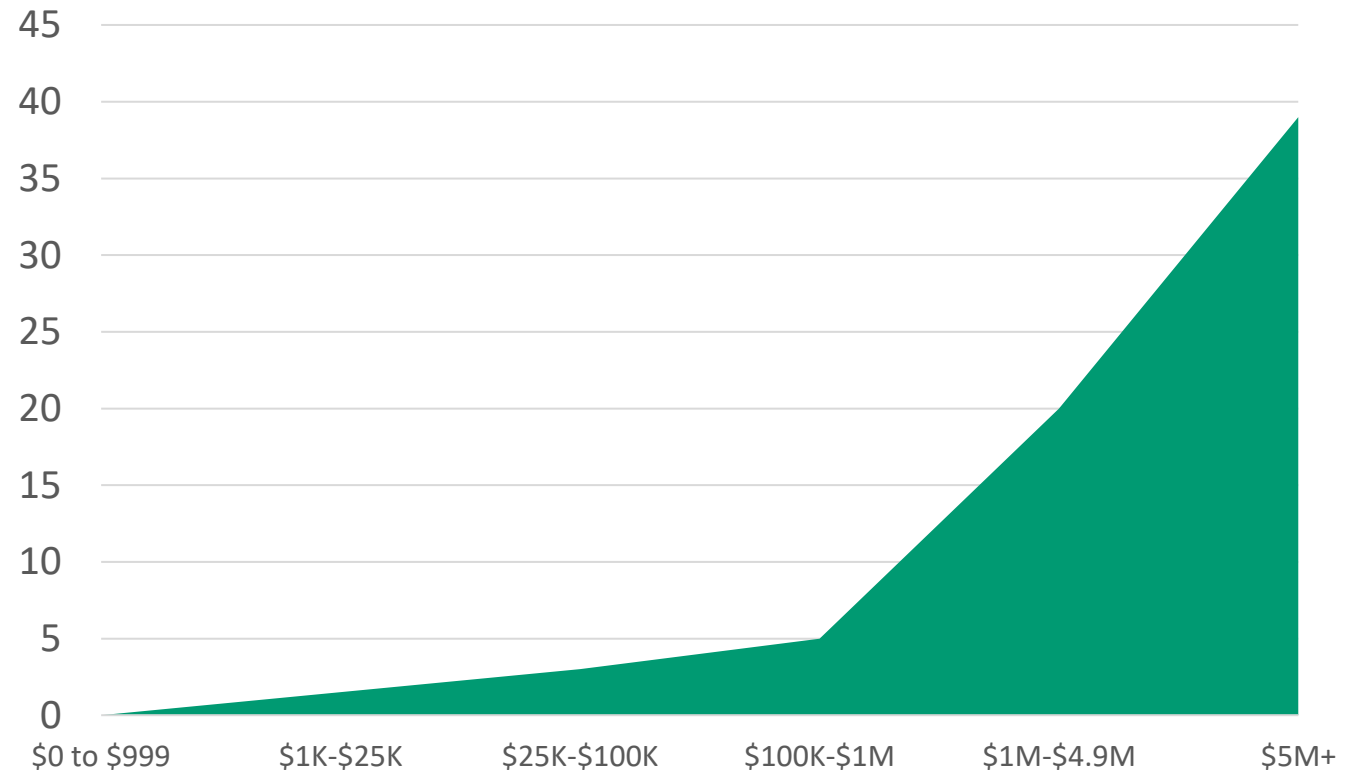
## Major Giving

Scalable processes  
Dynamic portfolios

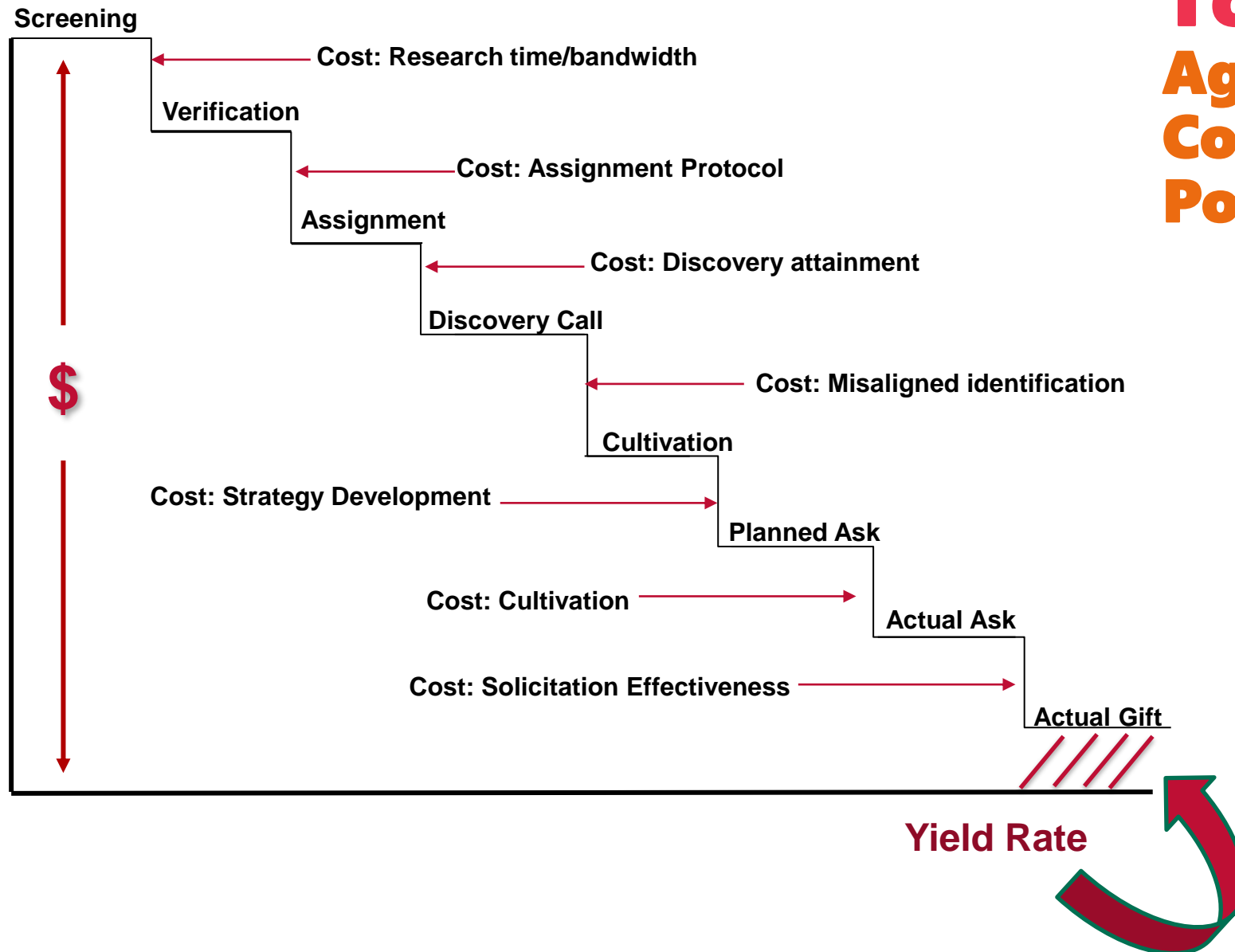
## Leadership Giving

Transactional rigor  
High volume

Estimated Visits by Gift Level



# Total Costs Against Constituency Potential

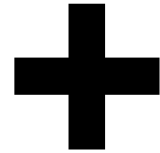




# Officer Success Study







## **Execution Metrics** **From a Study of** **Fundraisers**

7 Academic Institutions

Top 20% of performers compared to the other 80% of performers

Which activities drive production?

# Reach is more important than visit count



# Boldness in Asking: Ask to Capacity

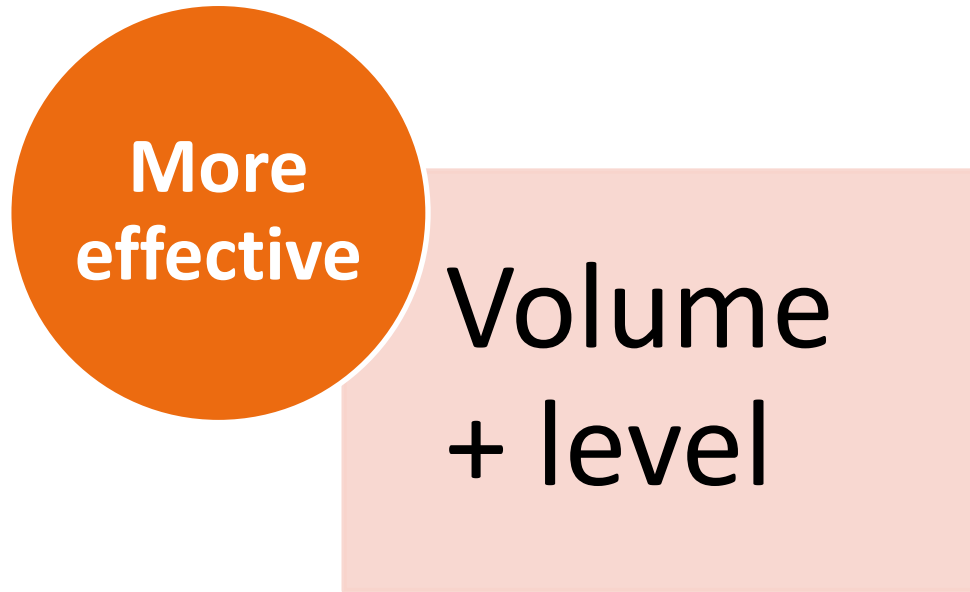
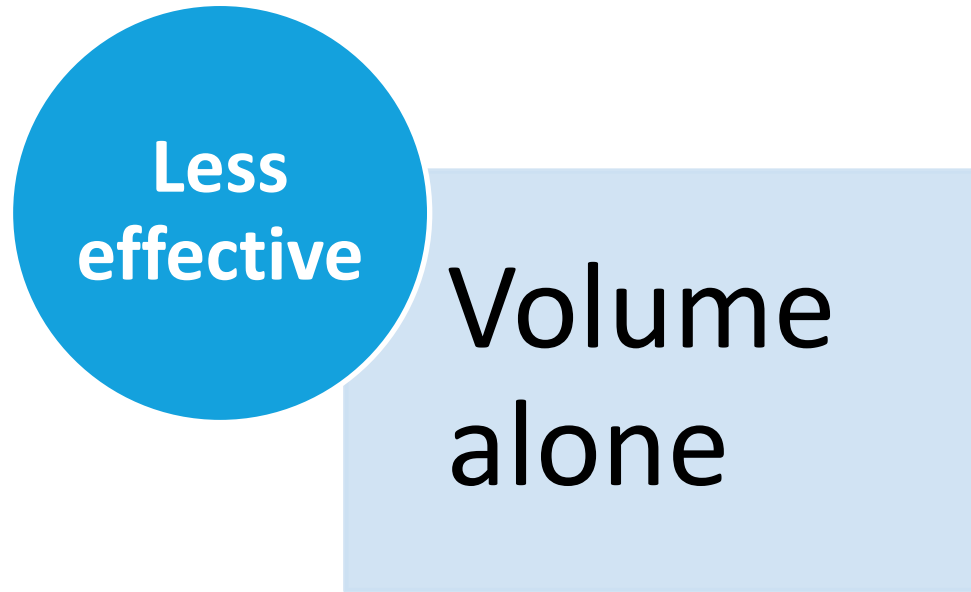
Less  
effective

What can  
we get?

More  
effective

What does  
it take to  
get?

# Ask Volume by Level



# Evidence of Measured Planning in Cultivation

**Less  
effective**

Short or long  
cultivation  
periods

**More  
effective**

10-12  
months

# Work with Supporting Team Members



*The top 20% of producers worked with prospect development **twice** as often as all other officers.*



# Stay with an Institution

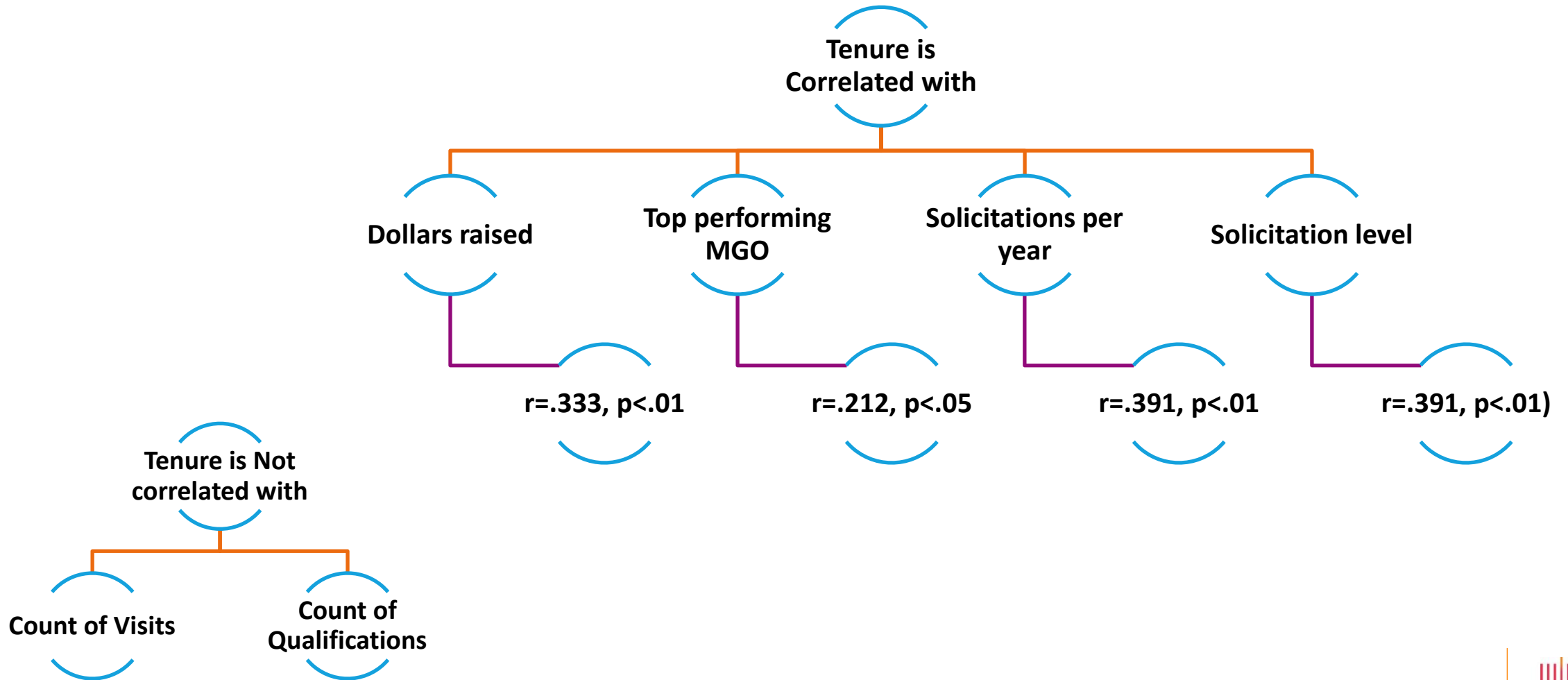
Less  
effective

New hires

More  
effective

Longer  
tenures with  
institution

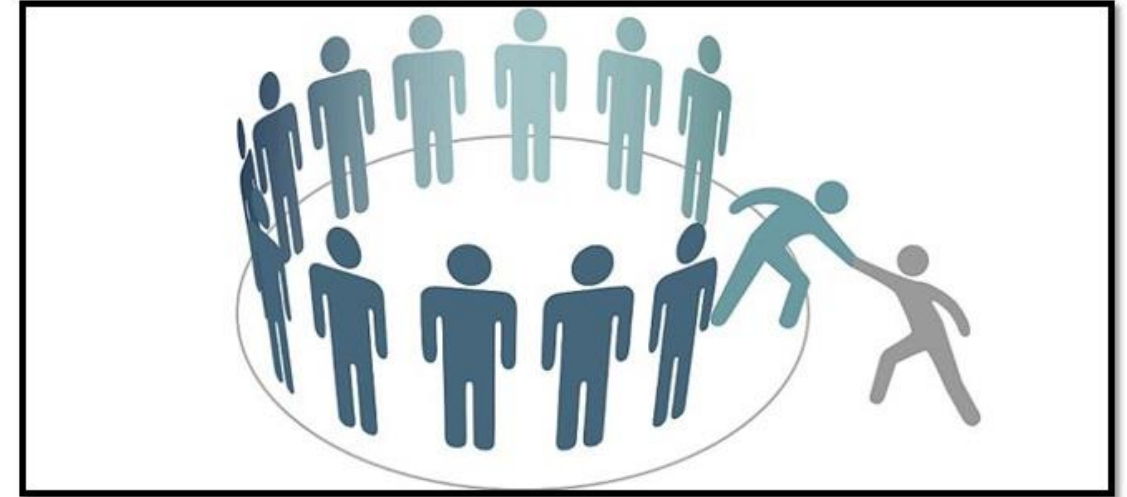
# Gap for New Fundraisers: Solicitation Effectiveness (when to ask and for how much)



## From a Related Study on Gift Officer Retention

### High performers who stay with an organization:

- Benefit from promotional tracks
- Set high standards for themselves and their leaders
- Thrive in solicitation-based metrics plans
- Stay with an organization longer
- Care about the mission



- Like to be measured
- Solicit more frequently.
- Set targets higher compared to capacity
- Are more willing to work with prospect development to keep portfolios tuned.

# Summary Markers of Fundraising Success

## Diversified program

- Top and bottom of the pyramid
- Model feeds the top
- Multi-channel

## Resourced Infrastructure

- Pipeline
- Data and technology
- Officer- and donor-servicing

## Authentic Leadership

- Passion for mission
- Driving a culture of philanthropy

## Engaged Staff

- Would give themselves
- Solicitation-focused in all activity

## Planning

- Organizational strategies well-articulated and followed

**Performance Management Intersects Many Key Areas**

# Discussion

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