What We Measure Improves

Going Beyond the Numbers

New Metrics

for Measuring Fundraising Success

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Anne Arundel Community College

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President, Brakeley Briscoe Inc..

CASE VII  San Francisco, CA  December 8, 2008
Where do you want to go?
## Where The Giving Comes from

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<th>Corporations</th>
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<td>19%</td>
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<td>21%</td>
<td>43%</td>
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Voluntary Support
As a Percentage of Expenditures

All Higher Education

2-Year

Only represents survey respondents.
Growth in Contributions

Two-Year

Higher Education
Presentation Outline

- Influences & challenges in choosing to implement a metrics system
- Management
- Case study analysis
- Building a Philanthropic Culture
Presentation Outline

- Influences & Challenges in Choosing an Evaluation System
  - Why have one?
  - Economy and Giving
  - Traditional vs. Non Traditional

- Management
- Case Study Analysis
- Building a Philanthropic Culture
Influences and Challenges in Choosing a Measurement System

- Why have one?
  - Validate program with administration?
  - Reward top-level employees?
  - Remove/replace poor performance?
  - Focus on what is important?
Dialogue

What Are You Measuring Now and Why?
Influences and Challenges in Choosing a Measurement System

- Exploring metrics that factor into traditional fundraising evaluation
  - Dollars raised
  - Visits
  - Contacts
  - Proposals
  - Other?
Influences and Challenges in Choosing a Measurement System

- Traditional Components
  - Contacts
  - Proposals
  - Dollars Raised
  - Miscellaneous (priorities)
Influences and Challenges in Choosing a Measurement System

- Contacts
  - Face-to-Face
  - Phone
  - Other (email; events)

- Proposals
  - More/less important than dollars?
  - How many?
  - How can we guarantee quality?
Influences and Challenges in Choosing a Measurement System

- Outcomes: Dollars Raised
  - Cash versus deferred gifts
  - Restricted versus unrestricted
  - Gift purposes

- Input and Throughput Measurements
  - Budget management
  - Hit rate (successful funded proposals)
  - Marketing
  - Staff relationships
  - Stewardship
Presentation Outline

- Influences & Challenges in Choosing a Measurement System

Case Studies
- Kelley School of Business
- Oregon State Foundation
- Anne Arundel Community College

- Management
- Case Study Analysis
- Building a Philanthropic Culture
Case Studies

Sources

- The Kelley School of Business
  - Metrics at Indiana University Kelley School of Business. A point-based system of measurement.

- The Oregon State Foundation
  - Quantitative measurements used to focus fundraising activity and increase productivity at Oregon state. Went from no performance metrics to implementation in one year.

- Anne Arundel Community College
  - Using other colleges’ systems and incorporating issues important to Community Colleges
Case Studies

The Kelley School of Business

- Components
  - Contacts
  - Dollar Goals (if we do the first three; money comes)
  - Proposals (asking via writing)
  - Administration

- 100 point system (80+ bonus eligible)
  - Contacts: 30 points (100 face to face visits)
  - Proposals: 25 points (15+ greater than $100K)
  - Administration 20 points (hit rate, budget, stewardship)
  - Dollar Goals: 25 points
Case Studies

- Oregon State University Foundation
  - Measure
    - Dollars raised in new major gifts ($25K)
    - Number of new major gifts
    - Proposals Opened
    - Portfolio composition, prospect rating
    - Face-to-face visits
    - Travel (5-7 days month/ 3-5 visits day)
  - Why they did it?
    - Focuses effort
    - Get results – if you do it; you will get results!
Case Studies

- Oregon State University Foundation
  - Scaled by Job Type
    - Assistant Director/Director
      - $1-2 million ($1-2.5 million)
      - 6-24 new major gifts (12-16 new major gifts)
      - 20-60 open proposals (20-40 open proposals)
      - 75-125 prospects rated $25K-$1M (50-100/$5M)
      - 160-200 visits (120-160 visits)
      - 20% administrative (25%)
AACC Implementation Diagram

Wrote Plan
- Wrote Development Plan
- Staff wrote plans & estimated metrics

Tested
- Tested metrics with consultant
- Discussed with board/volunteers

Implemented
- Finalized metrics
- Created “map” in donor software
- REPORT!!!!
AACC: Moves Management

- Moves Management – going beyond the $ Identification
  Qualification
  Cultivation
  Solicitation
  Stewardship

*Our consultant’s question: How can we move from transactional fundraising to transformational fundraising?*
Case Studies – AACC Metrics

- Dollars Raised
  - Direct Mail; Phone/Email; Face-to-Face; Events
- Proposals
  - Total Number; Number funded
- Cultivation
  - Events, Advisory Boards
- Stewardship Acts
  - Thank yous, Personal Visits, Invitations
- Engaged Committees/Volunteers
- Engaged Leadership
  - President, Foundation Board Members
- Budget management/cost savings
AACC Benefits – First 18 months

- Engaged volunteers
- Engaged leaders (including faculty)
- Increased (doubled) faculty-staff giving
- Philanthropic culture emerging
- Staff clear on goals and objectives
- BALANCE!
- Discussions of future campaign...moving towards transformational fundraising.
AACC Metrics Results

- 89 lapsed donors were recovered in 2008
- 182 donors increased their giving over last year
- 392 donors gave to the AACC Foundation for the FIRST Time!
- 120,000 copies of the Community of Alumni and Friends Magazine were distributed
- 35,000 friends of the college received the first annual “Foundations” Newsletter
- 10,000 + invitations were sent for various campus events
- 800 donors and friends of the college visited campus in 2008 for department tours, receptions, 007 Gala, business breakfasts, and Job Corps lunches.
- 87 volunteers were engaged in fundraising activities
- 295 scholarship notifications were sent to scholarship sponsors including thank you letters student awards and fund balances
- FY 2008 year-to-date fundraising is up 125% compared to FY07
- Over $500,000 was awarded to 315 scholarship students
Presentation Outline

- Influences & Challenges in Choosing a Measurement System

**Management**
- Using Technology
- Budget
- Call Report

- Case Study Analysis
- Building a Philanthropic Culture
Management: Budget & Reporting

- Ongoing management issues – so important
- Call Reports
- Budget Administration
- Decisions about resource allocation (people & $$)
Presentation Outline

- Influences & Challenges in Choosing a Measurement System
- Management

- Case Study Analysis
  - How challenges were addressed
- Building a Philanthropic Culture
Dialogue

What Sorts of Obstacles Will You Encounter in Introducing or Modifying Your Metrics Program?
Case Study Analysis – How Challenges were Addressed

- Potential Roadblocks
  - Staff reaction to any system
  - Time to maintain/govern the system
  - Administrative Support
  - Economy!
Case Study Analysis – How Challenges were Addressed

- What should we be doing as development professionals?
  - Raising Money? If so, what kind?
  - “Friendraising” - Alumni
  - Planning events?
  - Grant Writing & Reporting?
  - Tending scholarships?
  - Scheduling President/Leadership Volunteers

Whatever it is that you need to do most – measure and report it!
Case Study Analysis – How Challenges were Addressed

- What is most effective?
  - Travel and face-to-face visits
  - Phone calls
  - Email
  - Mailed correspondence?
  - Managed telefunds?
  - Plan events?

You don’t have time NOT to measure!
Case Study Analysis – How Challenges were Addressed

- Obstacles
- What is in our way?
  - Time
  - Managerial/supervisory
  - “Other” assigned duties
  - Staff limitations?
  - Budget restrictions?
  - Plan President/Dean visits/travel
Don’t take our word for it...

“I’m not afraid of development anymore, because it isn’t all about dollars.”

“Honestly, I was wasting a lot of time before metrics.”

“WOW – we are really doing a LOT!”

“(sheepish), I need to step up....”
Presentation Outline

- Influences & Challenges in Choosing an Measurement System
- Management
- Case Study Analysis

**Building a Philanthropic Culture**
- “Winning the Skills Race” – our CASE
- Benefits of Metrics on Culture
Building a Philanthropic Culture with Metrics

- Richer reporting
- Educate about the process of philanthropy
- Justify budget
- Justify new staff – Keep staff
- New College priorities emerge = NEW OPPORTUNITIES FOR DONORS
Building a Philanthropic Culture with Metrics

- Transactional vs. Transformational Fundraising
- Economy
  - Tell your story
  - Cultivate, cultivate, cultivate
  - Steward, steward, steward

“We are what we do repeatedly. Excellence, then, is not an act, but a habit.”
~ Aristotle
Not one of the good-to-great companies focused obsessively on growth (dollars).

...culture of discipline. When you have disciplined people, you don't need hierarchy. When you have disciplined thought, you don't need bureaucracy.

--Jim Collins Good to Great
Acknowledgements

- Giving USA Foundation/Giving USA 2008
- College Board, “Winning the Skills Race”
- Brakeley Briscoe: Marianne Briscoe, Shauna Chabot, Lucy Hughes
Questions? Comments?

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2007 charitable giving
Total = $306.39 billion ($ in billions)

- Individuals: $229.03 (74.8%)
- Corporations: $15.69 (5.1%)
- Foundations: $38.52 (12.6%)
- Bequests: $23.15 (7.6%)

Source: Giving USA Foundation™ / Giving USA 2008
Types of recipients of contributions, 2007
Total = $306.39 billion ($ in billions)

- Religion: $102.32 (33.4%)
- Education: $43.32 (14.1%)
- Human Services: $29.64 (9.7%)
- Health: $23.15 (7.6%)
- Public-Society Benefit: $22.65 (7.4%)
- Arts, Culture, and Humanities: $13.67 (4.5%)
- International Affairs: $13.22 (4.3%)
- Environment and Animals: $6.96 (2.3%)
- Foundations: $27.73 (9.1%)
- Unallocated giving: $23.67 (7.7%)

Source: Giving USA Foundation™ / Giving USA 2008
Total giving, 1967–2007

$ in billions

- Inflation-adjusted dollars
- Current dollars


Source: Giving USA Foundation™ / Giving USA 2008
Giving to Higher Education During Recessions, Stock Market Declines, and Tax Acts

- ERRA 1981
- TRA 1986
- 9/11
Sample Report – Month Summary

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BRAELEY BRISCOE
FUNDRAISING & MANAGEMENT CONSULTANTS
## Sample Report – Detail

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