

Sample Metrics by Function

The sample metrics listed below offer a starting place for a conversation about performance metrics. This is not a complete list and there may be metrics listed that are not relevant for a particular organization. For more information, please contact Carrie Dahlquist at carrie.dahlquist@campbell.company.com.

Frontline Fundraising Officer

(Principal, Major, Planned, Corporate, Foundation, Leadership Annual Gifts)

Dollars Raised or Solicitations/Proposals Booked (\$)

Solicitations Asked/Proposals Submitted (#)

Visits Made (#): may not be relevant for officers (e.g. some foundation officers) who do not use visits as a strategy for moving relationships forward

Note: The objective in managed relationships is to move a constituent through the philanthropic lifecycle toward their gift. While visits do not capture the full complement of ways that constituents are moved, they are important “touchpoints” and easy to track. It is important to establish goal for both inputs (visits) and outputs (dollars raised) to ensure a balanced approach.

May also consider:

- Solicitations/Proposals Booked (#, % yield)
- Solicitations Asked/Proposals Submitted (\$)
- Assists (#, \$): especially useful for planned giving officers, who may be less focused on face-to-face visit and more focused on supporting MGOs; also useful in large organizations where prospects may have multiple interests and therefore may interact with multiple fundraisers
- Qualification Visits/ Discovery Calls (#) - especially if a goal of the organization is to expand the prospect pool
- Dormant prospects (e.g. 90 days without contact or action) as % of assigned prospects

Annual Giving/Membership (by Giving/Membership Level if applicable)

Dollars Raised (\$)

Donors (#)

Average Gift (\$)

Percent Participation (%)

May also consider:

- Upgraded (#,%)
- Renewed (#,%)
- Reactivated (#,%)
- Acquired (#,%)
- Appeal (# of appeals, # of constituents solicited)
- Return on Investment by appeal (\$ raised, cost of appeal)
- Qualification Visits/ Discovery Calls (#) - especially if a goal of the organization is to expand the prospect pool
- Prospect Transfers (#): This represents metrics for incentivizing upward cultivation and transferring prospects to major gift officers

Prospect Research

Prospects Identified (#)

Profiles (#)

Prospects Rated (#)

May also consider:

- Average turn-around of requests (# of days)
- Average person-hours
- Prospects rated as% of prospects assigned
- Prospects with profiles as% of prospects assigned
- *Note: the first two metrics above will likely necessitate tracking outside the database*

Prospect Management

Prospects in Pipeline (% by stage)

Prospects Assigned (as % of constituency)

Prospects by Rating - Assigned vs. Unassigned

May also consider:

- Dormant prospects (e.g. 90 days without contact or action) as % of assigned prospects

Donor Relations/Stewardship

Acknowledgements (#)

Average turn-around of acknowledgements (# of days)

Stewardship Reports (#)

Communications

Communications (# of communications, # of constituents reached)

Communications by Type- including social media (# of communications, # of constituents reached)

May also consider

- Coordinated/Collapsed communications (# of communications, # of constituents contacted)
- Email click-throughs (#, % yield)
- Unique visitors to development/advancement section of website
- Unique visitors to development/advancement section of intranet site (if applicable)
- Turnaround time on communications requests?
- Return on Investment by communication vehicle

Special Events

Events (# of events, # of attendees per event)

Events by Type (# of events, # of attendees per event)

Dollars Raised (if fundraising event)

May also consider

- Return on Investment by event

Gift Processing/Data Entry

Gift Transactions processed (#-by processing agents)

Gift Transactions processed (#-with lockbox, if applicable)

Batches processed ((#-by processing agents)

Bio data entries (# records added; # records updated)

Correcting entries (#, # by type (e.g. gift, bio, etc.))

Average turn-around of receipts/acknowledgements (# of days)

May also consider

- Gift Transactions by Type (#)
- Gift Transactions by Purpose (#)
- Gift Transactions by Amount (#)
- Pledge Write-Offs, Write-Down, Cancellations (#)
- *Note: the first three items above are especially useful if certain gift processors focus on more complicated transactions, which take longer to process*