FUNDRAISERS’ GUIDE TO KPIs:
how to make your fundraising program more effective

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International Fundraising Festival
Few words about me

• 13 years of professional fundraising experience (Fundraising Director at Greenpeace CZ and VIA Foundation)

• Since April 2015 Executive Director at Piána na ulici

• Co-founder of Coalition for Easy Giving  
  www.snadnedarcovstvi.cz

•  
  www.darujme.cz and www.techsoup.cz

• Fundraising volunteer (Nesehnutí, Hnutí DUHA, Green Party)

• Spreadsheets and graphs lover
...last year we launched **State of the Canadian Web Nation Report** and one particular finding keeps on coming up again and again. Of the more than 500 charities we polled, **only 18.99% report that they pay very close attention and are getting quite sophisticated using KPIs, benchmarks, and other goals to measure performance.** That means that roughly 80% of us aren’t. That is not a good thing.

_Holly Wagg, [www.charityinfo.ca](http://www.charityinfo.ca)_

Measuring performance against goals and tracking KPIs occur in **80% of companies.**

[www.smartkpis.com](http://www.smartkpis.com)
Today’s agenda

• Key Performance Indicators: what it is and how it can help you
• How to design your own set of KPIs and what to do with it afterwards
• Examples of fundraising and engagement metrics and tools you can use
• KPIs are quantifiable measurements of an organization’s health or success.

• A proper set of KPIs gives you data to evaluate your major successes & failures and get the real picture of your fundraising program.

• When using KPIs your decisions are based more on facts than feelings.
Why you should try it?

• True understanding of the fundraising process is generally low, so take a microscope and have a look on what’s going on with your donors

• Historical data helps you better predict future

• If you want to grow your fundraising program you should test and then invest where return is high

• Your donors, EDs, Boards want to know you’re effective  🌟
### CWRF: Becoming Data Informed: What Does It look like?

<table>
<thead>
<tr>
<th>Crawl</th>
<th>Walk</th>
<th>Run</th>
<th>Fly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lacks consistent data collection</td>
<td>Data collection consistent but not shared</td>
<td>Data from multiple sources</td>
<td>Org Wide KPIs</td>
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<tr>
<td>No reporting or synthesis</td>
<td>Data not linked to results, could be wrong data</td>
<td>System and structure for data collection</td>
<td>Organizational Dashboard with different views, sharing</td>
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<tr>
<td>Decisions based on gut</td>
<td>Rarely makes decisions to improve</td>
<td>Discussed at staff meetings, decisions made using it</td>
<td>Data visualization, real-time reporting, formal reflection process</td>
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**Analysis**
- Tools
- Sense-Making

**Reference:**
- *Measuring the Networked Nonprofit* by Beth Kanter

**Links:**
What are Key Performance Indicators?

**What they are:**
- Quantifiable/measurable and actionable
- Measure factors that are critical to the success of the organization
- Tied to business goals and targets
- Limited to 5-8 key metrics
- Applied consistently throughout the company

**What they are not:**
- Metrics that are vague or unclear
- “Nice-to-know’s” or metrics that are not actionable
- Reports (e.g., top search engines, top keywords)
- Exhaustive set of metrics
- Refutable

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Key Performance Indicators

1. Decide what to measure
2. Collect the data
3. Analyse the data
4. Report the results
5. Take action
## The seven characteristics of effective KPIs

<table>
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<tr>
<th>Characteristic</th>
<th>Description</th>
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<tr>
<td>Non-Financial</td>
<td>Non-financial measures (not expressed in CZK, Euros, etc.)</td>
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<tr>
<td>Timely</td>
<td>Measured frequently</td>
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<td>Management focus</td>
<td>Acted upon by the senior management team</td>
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<td>Simple</td>
<td>All staff understand the measure and what corrective action is required</td>
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<td>Team based</td>
<td>Responsibility can be assigned to a team or a cluster of teams who work closely together</td>
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<td>Significant impact</td>
<td>Measure what is important for you to know, not what is nice to have</td>
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<td>Limited dark side</td>
<td>They encourage appropriate action (i.e., have been tested to ensure they have a positive impact on performance, whereas poorly thought through measures can lead to dysfunctional behavior)</td>
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http://en.wikipedia.org/wiki/Performance_indicator
Decide what to measure

• Think carefully about your FR program. What are your strategic goals? Which FR processes you need to better understand to? Which KPIs would be relevant for you? Why?

• Are you able to periodically collect these data? From where? How? Who will do it?

• Prepare a definition and calculation formula for each KPI
Check your FR processes
Sample FR questions to ask yourself

• Is our donor base growing? Are we keeping or losing our donors?
• Which donors are leaving us? When are we losing them?
• Are new donors staying active? Are recently regained donors staying active?
• Are we improving the quality/initial involvement of new donors?
• Are donors giving us more or less? Are donors giving more frequently?
• Are continuing donors increasing or decreasing their involvement?
FR BASIC KPIs

- Donors growth (year over year)
- Gross and net income growth
- Average gift size growth
- Donor retention / attrition rates
- Recurring gifts percentage – from all donors, from gross income
- FR ROI (income/costs) – per program, per method
The Engagement Pyramid

Bottom of Pyramid: Communications and relationships are technology-centric and automated.

- Use technology to automate interactions to reach lots of people.
- Tools: Websites, Databases, Email, Social networks

Level 6: LEADING
- Communications and relationships are labor-intensive and personal.
- Personal relationships are critical to success.

Level 5: OWNING
- Tools: Websites, email, social networks still play a role, but above level three is no substitute for the human touch.

Level 4: CONTRIBUTING

Level 3: ENDORSING

Level 2: FOLLOWING

Level 1: OBSERVING

#smHI | @ck4q | @ajay4quality

Gideon Rosenblatt, Former Groundwire Executive Director
Social media and website

Don’t focus that much on how many likes on FB you have but rather think how you can send people from social media to your website to:
- sign petition
- subscribe to your newsletter
- donate
- become volunteer etc.
CO CHCE GREENPEACE V ARKTIDĚ?
► vytvoření mezinárodně chráněné oblasti kolem severního pólu
► zákaz průzkumných ropných vrtů a těžby ropy
► zákaz průmyslového rybolovu
PŘIDĚTE SE JI!  WWW.SAVETHEARCTIC.ORG

VZKAZ PRO P&G - SKONČETE S ODEBÍRÁNÍM PALMOVÉHO OLEJE OD FIREM, KTERÉ KÁČÍ PRALESY!
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PŘIDĚTE SE JEŠTE TEŽ A SDÍLEJTE S PŘÁTELI...
►►►  www.bit.ly/1dottbl
Engagement measures

Website:
traffic, sources, behavior on your web, conversion rates

Social media:
# of fans and followers, demographics, likes, shares, comments

Email list:
opens, click-throughs, opt-outs
# of active emails (interacted with you in last x months)
ACQUISITION

- New donors by method
- Recurring vs. One-off
- Nr. of donors over 25
- Cost per new donor per method
- Average donation per method
- No show attrition
- 6 months/1st year /2nd year attrition
- ROI Y1, Y2, Y3
Lead generation & conversion

- Total # of sign-ups
- # of new sign-ups
- Phone capture rate on new
- Number contacted via phone, conversion rate
- Email conversion: delivery / open / click-through / conversion rate
Online fundraising

- Total funds raised online
- Total funds raised online by channel/program
- Number of new online donors: recurring, one-off
- Average gift
- Website conversion rate
KPIs changes with your strategy

GP and face to face fundraising:

**Past:** # of sign ups, # of new donors = focused on volume

**Today:** additional measures = focused on quality
- Street face to face program max 50% of all acquisition
- % of new donors over 25
- % of donors who are still active after 13 months
Few tools that help

- Excel and google drive 😊
- Database – standardized reports/queries
- Google analytics
- Email marketing tools that offers you reports
- Cyfe.com – all-in-one dashboards
- Optimizely.com – for online testing
- Lucidchart.com – diagrams & work flows
THANK YOU