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## Evaluating Your Development Plan: A Series of Dashboards for Tracking Progress

Metrics allow you to measure your progress in the core competencies of development. Such metrics (standards) ensure that you compare performance year to year and make certain that you are moving forward.

It also offers an organized fashion to set goals in various areas other than the total amount of money raised. This is important because it takes time for you to substantially increase the amount of funds you raise and this system of metrics permits you to determine if you're really making progress. For example, part of improved fundraising is expanded board involvement. It will take a year or two for this to translate into more money raised. In the meantime, however, you can track the extent to which your board comes to meetings more regularly, receives fundraising training, identifies potential donors, and participates on the development committee.

What follows are sample dashboards for tracking various competencies. Use these as examples to help you design your own, tailored to the specific goals of your own organization.

### Planning Dashboard

Metrics in this area are "either you do a task or you don't" rather than something that can be quantified. Each year you should engage in review of your plan, creation of a development plan that is adopted by the board, and be clear on where you are in relation to your next strategic planning process ( we recommend a planning cycle of not more than three years.)

	2011	2012	2013
Strategic Plan Reviewed			
Development Plan Created			
Board Approved Development Plan			

## Board Involvement Dashboard

Board involvement is a combination of quantifiable and qualitative metrics, ranging from the board’s attendance at meetings to their increased giving and willingness to solicit.

	2011	2012	2013
Total Board Giving (\$ and % of board)			
# of Board Members who solicited gifts			
# of Board Members who received fundraising training			
Percentage attendance at board meetings			

## Advanced Fundraising Mentality Dashboard

A major element of success in any development program is the extent to which an advancement frame of mind permeates the entire organization. It is both difficult and simple to measure because – when it’s missing – you feel it in every activity you undertake and –when you have it—your fundraising efforts become easier. How do you quantify this complex measure of success? The Advanced Mentality Dashboard suggests the following:

	2011	2012	2013
% of Board on Development Committee			
# of Cultivations/Solicitations by both Board & Staff			
% of Board & Staff who agree “fundraising is everyone’s job”			
% of Board & Staff familiar with annual case for support			

## Development Activities

A strong organization possesses a balanced and varied development program that avoids reliance on a single source of funds (e.g. an annual auction or luncheon, direct mail, or one or two major grants). The organization shows growth in all areas of fundraising that it uses and is always open to new opportunities. You might have several different dashboards for your development activities, depending on the size and complexity of your organization. Some examples follow:

<b>Direct Mail Dashboard</b>	2011	2012	2013
# of gifts / % return			
Average gift size / cost per gift			
Retention rate / # of new gifts			
# of increased gifts			

<b>Events Dashboard</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
# of attendees			
Average revenue per attendee			
Cost per \$ raised			
# of event attendees who become annual donors			

<b>Major Gifts Dashboard</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
# of Major Gifts			
Average Major Gift size			
# of new Major Donors			
Retention %			

<b>Planned Gifts Dashboard</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
# of meetings with planned giving prospects			
# of people reached through planned giving brochure			
Expansion of planned giving resources (ex. Estate attorneys)			
# of known testamentary expectancies			
% of Board including organization in estate planning			

<b>Corporate &amp; Foundation Gifts Dashboard</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
# of proposals submitted			
# of personal meetings held			
# of proposal % approved			
Total funds raised			

## Stewardship

Stewardship of current donors is perhaps the greatest determinant of the success of your development efforts. You must create metrics that help you track how successfully you steward your donors and how closely you mirror the techniques discussed in Penelope Burk's "Donor Centered Fundraising."

	<b>2011</b>	<b>2012</b>	<b>2013</b>
# of times you communicate with each donor w/o asking for \$!			
% of communications that are personalized and/or segmented			
% of communications that are forms and/or unsegmented			
Total % of donor retention			

# Communications and Messaging

To support your fundraising efforts requires consistent and powerful communication vehicles, consistent messages, and integration of your public awareness and fundraising activities. The heart of these efforts lies in your annual case for support, which justifies your fundraising effort each year and emanates directly from your strategic plan. Essentially, the annual case for support ensures that your development plan is based on your mission rather than simply resulting from a funding gap.

	2011	2012	2013
Creation of an annual case for support			
% Board & Staff able to articulate the case (elevator speech)			
Extent key org messages integrated into fundraising materials			
# of times each donor/prospect is exposed to core messages			

# Staffing and Infrastructure, Including Technology

Without trained staff, modern equipment and appropriate software, development activities are less efficient and successful. While this is hard to quantify, there are ways to determine this:

	2011	2012	2013
Do you have enough staff to raise the money you need?			
Is your office equipment hindering or helping your efforts?			
Using current resources, can you easily communicate with all donors & prospects?			
Can your software integrate all development, membership & accounting functions?			
Are you effectively using social media to bring your stakeholders closer to your mission?			