

The list that follows includes some potential KPI for F, C & G fundraising. NOBODY should try to use all. But, it may be appropriate for you to use some as "snap shot" measures (make sure "the pipeline stays filled") or monitor changes in them over time in order to manage toward improved performance. Both are valid, though different, uses of KPI.

### **1.0 RESEARCH (IDENTIFICATION)** - *all targets from past performance*

- 1.1 Media and General Online Searches finding suspects - Number of, rate of growth
- 1.2 Grants/Giving Database or Directory Research (grants.gov, FDO, equivalents) finding suspects - Number of, rate of
- 1.3 Suspects ID'd to you by informants & professional contacts - Number of, rate of growth
- 1.4 RFP/NOFA & Equivalents - Number of suspects identified by receiving document or email from funder.
- 1.4 ID'd by other means - Number of
- 1.5 Funder websites reviewed to qualify suspects - Number of, rate of growth
- 1.6 Hard copy from funder reviewed to qualify suspect - Number of, rate of growth
- 1.7 Discussed suspect with professional contacts or informants to qualify - Number of, rate of growth
- 1.8 Promising suspects moving forward to Relationship Building - Number of, rate of growth
- 1.9 Suspects moving straight to LOI/Proposal (Solicitation) because funder does not permit contact - Number of

### **2.0 RELATIONSHIP BUILDING (CULTIVATION)** - *Targets for 2.2-2.8 from past performance*

- 2.1 Newsletter, institutional prospects receiving? - Number of, proportion (Target: 100% receiving)
- 2.2 Made personal contact to continue relationship with funder staff or decision maker - Number of, rate of growth
- 2.3 Spoke with Influencer tied to institutional suspect or prospect - Number of, rate of growth
- 2.5 Initial contact with funder staff or decision-maker - Number of, rate of growth
- 2.5 Met with funder around specific project or need, number of or rate of growth
- 2.6 Further discussion encouraged by funder representative
- 2.7 LOI submission encouraged by funder representative
- 2.8 Submission of full proposal invited by funder representative

### **3.0 LOI, PROPOSALS, SPONSORSHIP REQUESTS (SOLICITATION)** - *Targets all from past performance*

- 3.1.1 LOI Submitted - Number of, rate of growth
- 3.1.2 LOI discussed with funder rep after submission - Number of, rate of growth
- 3.1.3 LOI leads to invitation to submit - Number of, rate of growth ("Batting Average = Proposal Invited / Total LOI)
- 3.1.4 LOI still pending - Number of, rate of growth
- 3.2.1 Proposals submitted - Number of, rate of growth
- 3.2.2 Post Submission discussion with funder - Number of, rate of growth
- 3.2.3 Proposals approved - Number, rate of growth ("Batting Average" = Proposals Approved / Proposals Submitted)
- 3.2.3 Funds awarded - Amount, rate of growth
- 3.3.1 Sponsorships Requested - Number, rate of growth
- 3.3.2 Post-request discussion of sponsorship with funder - Number of, rate of growth
- 3.3.3 Sponsorships approved - Number of, rate of growth ("Batting Average = Sponsorships Approved / Sponsorships
- 3.3.3 Sponsorship commitments - Amount, rate of growth

### **4.0 REPORTING AND COMPLIANCE (STEWARDSHIP)**

- 4.1 Timely Acknowledgement and Initial Paperwork - Average turnaround time, trends (Target: 1 week max)
- 4.2 Timely implementation of grant, gift or sponsorship commitments - Proportion on time (Target: 100% ontime)
- 4.3 Accuracy/correctness of implementation of grant, gift or sponsorship commitments - Error & complaint rates (Target: 0%)
- 4.4 Grantor, Donor, Sponsor recognition complete, correct, timely - Error rates (Target: 0% error)
- 4.5 Accomplishment of donor relations objective(s) such as "all funders invited for site visit" - (Target: you set!)

### **5.0 ALL TYPES OF FUNDRAISING**

- 5.1 "Mix"** - Ratio of Giving from Individuals, Corporations, Foundations, and Bequests. (Targets: Individuals 58-70, Bequests 5-9%, Corps 5-18%, Foundations 16-19% If your organization is Below or Low in a range, MIGHT be an area of opportunity
- 5.2 CPDR (Cost Per Dollar Raised)** - Fundraising Expenses divided by Funds Raised. Measure of the relative efficiency of your fundraising program or its parts. (Overall Target: \$0.10-0.25... \$0.50 too high, \$0.05 unsustainably low)

4.1 Timely Acknowledgement and Initial Paperwork - Turnaround time (days) (Target: 1 week max)

Explanatory slides are available at [www.montgomeryconsultinginc.com/downloads](http://www.montgomeryconsultinginc.com/downloads)