Montgomery Consulting

Recommended KPI: Individual Donors

The list that follows includes some potential KPI for fundraising from individuals. NOBODY should try to use all. Depending on what you hope trying to accomplish, it may be appropriate to use some as "snap shot" measures (make sure "the pipeline stays filled") or look at changes over time (in order to manage toward improved performance). Both are valid, though different, uses of KPI.

1.0 IDENTIFICATION

1.1 Number of "Mailable Names" - Number of (snap shot), rate of growth (monthly/annual changes)
1.2 Email List - Number of email addresses - Monthly or annual rate of growth in the number of email addresses in database
1.3 Social Media, friends, followers & equivalent - Number of, rate of growth
1.4 Computer Screening to ID high potential donors - Number or proportion of contact base that has been screened.
1.5 Manual List Review - Number or proportion of contact base (or Hi Pot people from computer screening) reviewed/discussed/had their giving potential rated.
1.6 Higher potential prospects/donors (w/upgrading potential) identified - Number of, rate of growth
1.7 Hi Pot prospects assigned for special attention - Number of, rate of growth

2.0 CULTIVATION

2.1 Newsletter - Number or proportion receiving
2.2 US Mail / Email frequency - Frequency (Target: 2 to 12 times/year)
2.3 Email Open rate, Click through rate, Time on page/site - Snapshot, rate of growth
2.4 Social Media Posting - Rate of posts per month (Target: Minimum weekly on main platform for your organization(
2.5 Cultivation or not explicitly fundraising events - Number of
2.6 Invitation/Acceptance - Number Sent & Ratio
2.7 Event attendance growth - Net gain, growth over time
2.8 Inquiries received, including visits (unprompted contacts asking about organization/its work) - Number of, rate of growth
2.9 High-level Cultivation Activities
2.91 Cultivation events for high-potential prospects - Number of
2.92 Attendance at high level cultivation - Number of attendees, rate of growth in attendance
2.93 Discovery calls, one-on-one calls on high potential prospects, total or by staff member. Monthly or Annual

3.0 SOLICITATION

3.1 Appeals Mass/Broad Base, segmented / not segmented, FR tool(s) used - Number of, rate of growth
3.2 Send Out for Mass/Broad Base Appeals, total, by appeal, by segment, by FR tool - Number of, rate of growth
3.3 Response (made gift) rate total, appeal, segment, FR tool - Number of, rate of growth [Lapsed Donors or Upgrading would be good Segments to consider]
3.4 Total high-level or Major Giving Prospects - Number of, rate of growth
3.4 Major gifts requested, total, by solicitor, purpose - Number of, rate of growth
3.5 Major gifts made, total, by solicitor - Number of, rate of growth
3.6 Major Gifts "Batting Average" (Gifts Made / Gifts Requested) total, by solicitor, by purpose
3.7 Major Giving, total and by solicitor - Amount, rate of growth
3.8 Donor Retenrion - Craft appropriate measure (some systems do for you, for others you need to program a report)

4.0 STEWARDSHIP

4.1 Turnaround Time for Gift Processing - Average number of days (Target: 1 week max)
4.2 Donor recognitions delivered promptly and accurately - Number of failures, failure rate
4.3 Negative Donor Comments, voluntary/unprompted complaints about any aspect of stewardship _ Number of, trend
4.4 Negative Media / Regulator Attention - Number of, trend (Target for both is 0)
4.5 Donor Survey Results (if conducted) ratings on Likert scale - Average rating(s), trends over time (Target: 4.5 on 5, 9.0 on