Using Benchmarking to Inform Data-Driven Fundraising Strategy

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Today’s speakers

Fred Scarborough, CFRE
Executive Vice President, Chief Communications and Development Officer
Arkansas Children’s

Rona Pryor
Director of research and insight
The Woodmark Group

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Why are we here?

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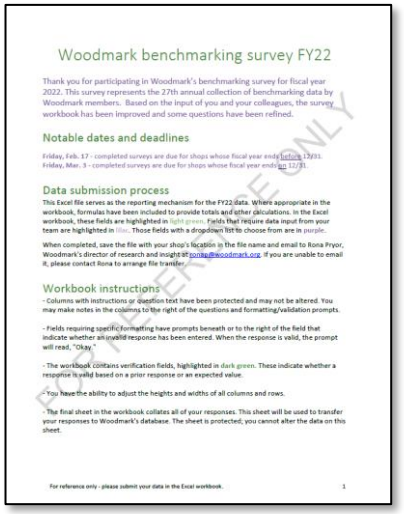
Woodmark benchmarking survey FY22

Thank you for participating in Woodmark's benchmarking survey for fiscal year 2022. This survey represents the 27th annual collection of benchmarking data by Woodmark members. Based on the input of you and your colleagues, the survey workbook has been improved and some questions have been refined.

Notable dates and deadlines

Friday, Feb. 17 - completed surveys are due for shops whose fiscal year ends before 12/31.
Friday, Mar. 3 - completed surveys are due for shops whose fiscal year ends on 12/31.

Data submission process

This Excel file serves as the reporting mechanism for the FY22 data. Where appropriate in the workbook, formulas have been included to provide totals and other calculations. In the Excel workbook, these fields are highlighted in light green. Fields that require data input from your team are highlighted in lilac. Those fields with a dropdown list to choose from are in purple.

When completed, save the file with your shop's location in the file name and email to Rona Pryor, Woodmark's director of research and insight at rona@woodmark.org. If you are unable to email it, please contact Rona to arrange file transfer.

Workbook instructions

- Columns with instructions or question text have been protected and may not be altered. You may make notes in the columns to the right of the questions and formatting/validation prompts.

- Fields requiring specific formatting have prompts beneath or to the right of the field that indicate whether an invalid response has been entered. When the response is valid, the prompt will read, "Okay."

- The workbook contains verification fields, highlighted in dark green. These indicate whether a response is valid based on a prior response or an expected value.

- You have the ability to adjust the heights and widths of all columns and rows.

- The final sheet in the workbook collates all of your responses. This sheet will be used to transfer your responses to Woodmark's database. The sheet is protected; you cannot alter the data on this sheet.

For reference only - please submit your data in the Excel workbook. 1

FOR REFERENCE ONLY

Annual survey

- 130 questions
- 600 data points
- Data collected over four months
- Covers all constituencies at all levels of giving
- Includes all business lines from annual to principal giving
- Captures inputs – FTEs, costs, numbers of solicitations
- Includes outputs – numbers of donors and gifts, total revenue raised.
- Submitted in a formatted Excel file

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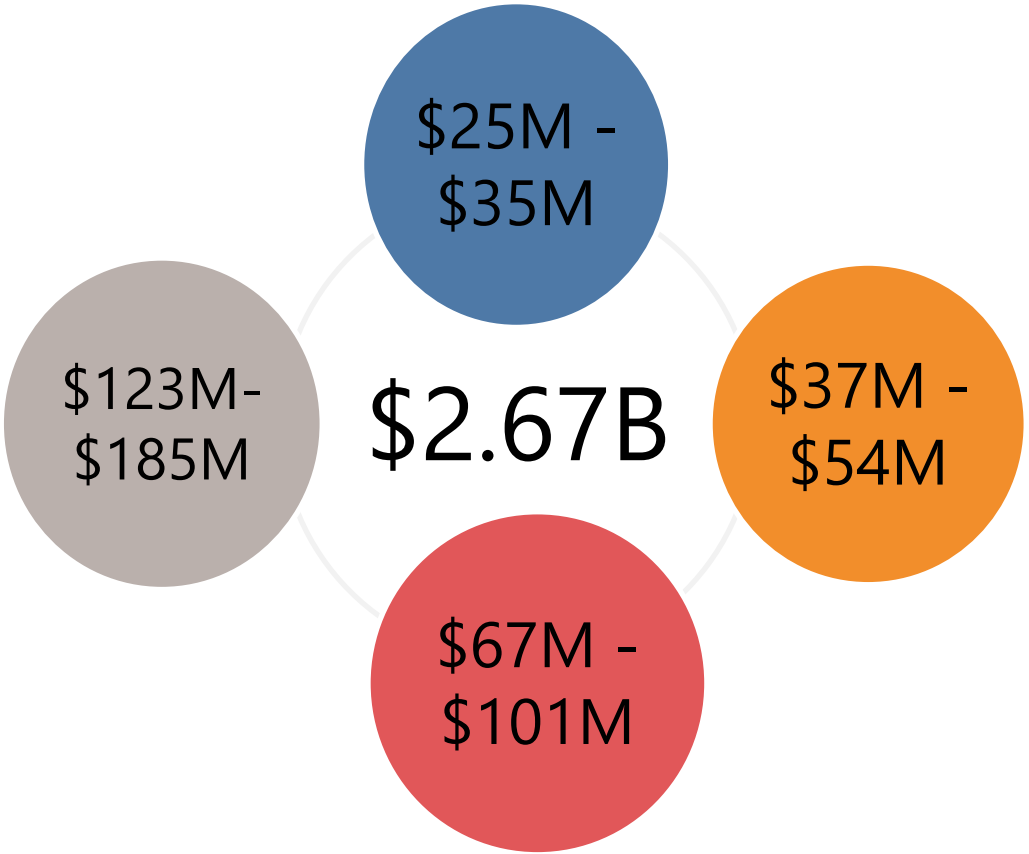

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MICRO (Under $100)	SMALL ($101 - $500)	MIDSIZE ($500 - $5K)	MAJOR ($5K - $50K)	SUPERSIZE ($50K+)
-14.0% YOY Change	-5.7% YOY Change	-4.8% YOY Change	-5.2% YOY Change	-6.8% YOY Change
60.7% % of total donors	27.5% % of total donors	10.0% % of total donors	1.6% % of total donors	0.2% % of total donors

Wealthy Couple Repays Alma Mater: $51.4 Million to University of Houston

The Largest Gifts

To higher education since 1967.

RECIPIENT	DONOR	AMOUNT	DATE
Emory University	Robert W. Woodruff	$105 million	1979
Stanford University	David Packard	$70 million	1986
University of Miami	James L. Knight	$56 million	1986
University of Houston	**John and Rebecca Moores**	**$51.4 million**	**1991**
Calif. Institute of Technology	Arnold & Mabel Beckman Foundation	$50 million	1986
Cornell Medical Center	Anonymous	$50 million	1983
United Negro College Fund	Walter Annenberg	$50 million	1990
University of Richmond	E. Claiborne Robbins	$50 million	1969
Yale University	Paul Mellon	$47 million	1967
Univ. of Texas Southwestern Medical Center	Harold C. Simmons	$41 million	1988

Source: The Chronicle of Higher Education

By ANTHONY DePALMA

In a tale of love and money, John J. Moores and Rebecca Baas of Sugar Land, Tex., were high school sweethearts who struggled to make it through the University of Houston in the 1960's and then made it big with their own computer software company.

Now quite wealthy, the Mooreses have given their alma mater a total of $51.4 million this year, the largest donation ever made to a public university in the nation.

"If the university had not been in Houston, it is highly doubtful that either one of us would have gotten a degree," said Mr. Moores, the 47-year-old founder and chairman of BMC Software Inc. "We are very grateful and wanted to help the school and help people who are like us, going to school part time."

The Mooreses have made eight donations in 1991 that total $51.4 million. They include $25 million to build a new athletic building and renovate existing sports fields; $11.5 million to the university's College of Optometry, which runs the River Blindness Foundation, and $10.2 million to build a new concert hall for the School of Music. Other, smaller grants went to support superconductivity research, a creative writing fellowship program, library improvements and scholarships.

"When my wife and I were undergraduates, we used to share the thought that someday perhaps we could help one or two students get through college," Mr. Moores said. "We never dreamed we'd be able to do something like this as quickly as we have. But it's fun."

Tough Times Still Ahead

Even with a record donation, the University of Houston, which is state-financed, faces difficult economic times. Tuition at the 33,000-student university is scheduled to increase next September to $20 per credit hour, from $18. Average costs this year for tuition, room, board and fees is $6,400.

Most states cut their higher education budgets this year, forcing many public universities to raise tuition and cut costs. The president of the University of Houston, Dr. Marguerite Ross Barnett, said the Mooreses' donations represent a new trend in higher education, in which state-financed universities are turning increasingly to private support from alumni, corporations and foundations.

"You're going to see more convergence," Dr. Barnett said. Private schools, she said, "are looking to public sources to support scholarships, and the publics will be pursuing more private university strategies to maintain appropriate levels of funding."

Large private contributions once were the sole province of the wealthy and well-established private universities, like Harvard, Yale and others in the Ivy League, whose graduates often went on to successful and lucrative careers. Of the 10 top contributions made to higher education since 1967, all but two have gone to private institutions. Public universities were considered to be well taken care of by public money.

Change Over the Years

But in recent years, as the publicly supported universities improved and state support withered, graduates who have increasingly taken their place at the head of profitable businesses have made substantial donations.

John Moores and Rebecca Baas met in their American history class married at the end of their freshman year at the University of Houston, where they were part-time commuting students, working and studying at the same time. By the time they graduated in 1970, each with a degree in economics, they had two children.

Mr. Moores went to work for I.B.M., then for the Shell Oil Company, where he noticed that the company's big main-frame computers were sometimes agonizingly slow. He developed programs to speed them up and, in 1978, went to work for himself, developing new programs to increase the speed and efficiency of existing computers. In 1980, with $1,000 in a Houston bank account, Mr. Moores started his company, BMC Software.

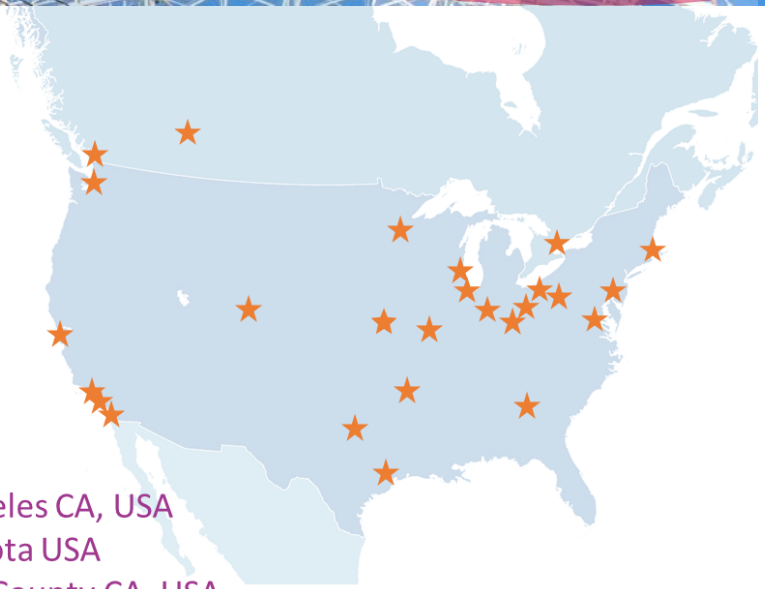
It now has 41 different programs and is a $90-million-a-year business with customers like CSX, Pizza Hut and other Fortune 500 corporations.

Mr. Moores said he decided to make the donations now, rather than after he had retired, because he was interested in seeing how the money will be used.

"We always thought it would be kind of fun to watch the buildings go up," he said, "and frankly we intend to do more through the years."

Akron OH, USA
Alberta CAN
Arkansas USA
Atlanta GA, USA
Boston MA, USA
British Columbia CAN
Chicago IL, USA

Cincinnati OH, USA
Colorado USA
Columbus OH, USA
Dallas TX, USA
Houston TX, USA
Indianapolis IN, USA
Kansas City MO, USA



Los Angeles CA, USA
Minnesota USA
Orange County CA, USA
Palo Alto CA, USA
Philadelphia PA, USA
Pittsburgh PA, USA
San Diego CA, USA

Seattle WA, USA
St. Louis MO, USA
Sydney NSW, AUS
Toronto ON, CAN
Washington DC, USA
Wisconsin USA

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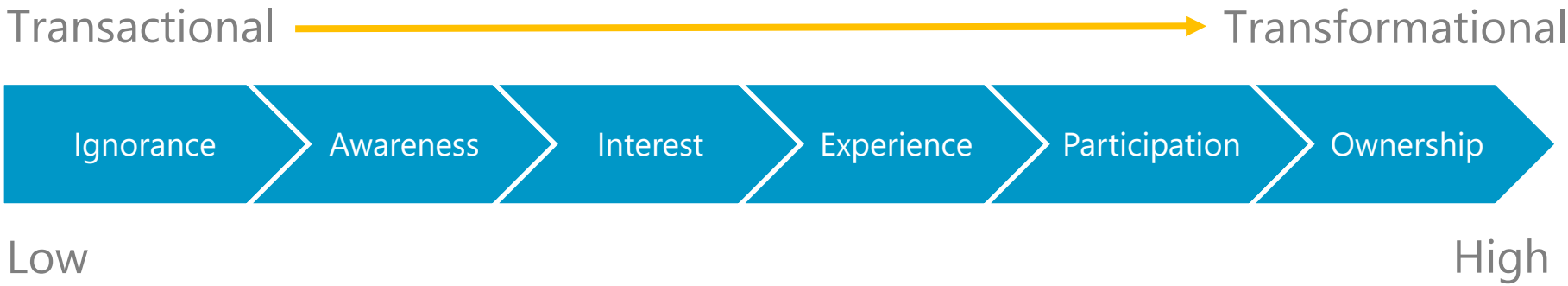
Commitment Continuum



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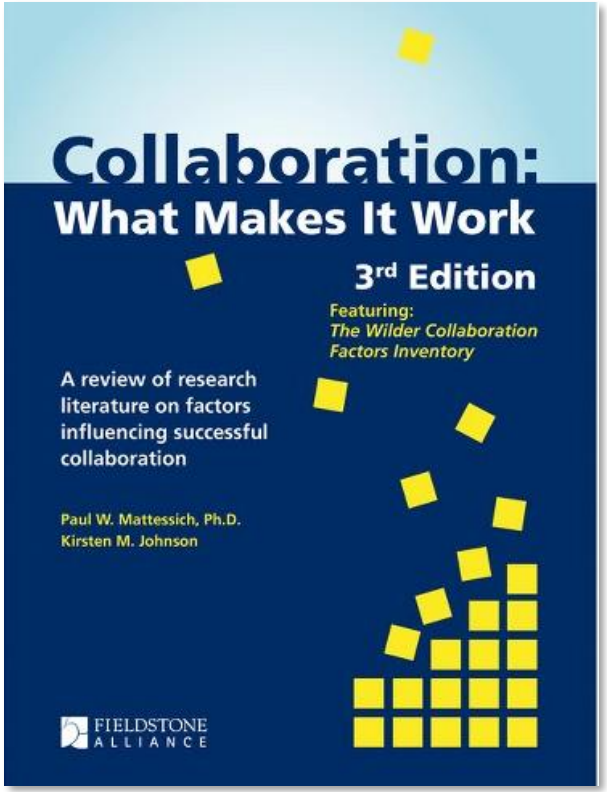
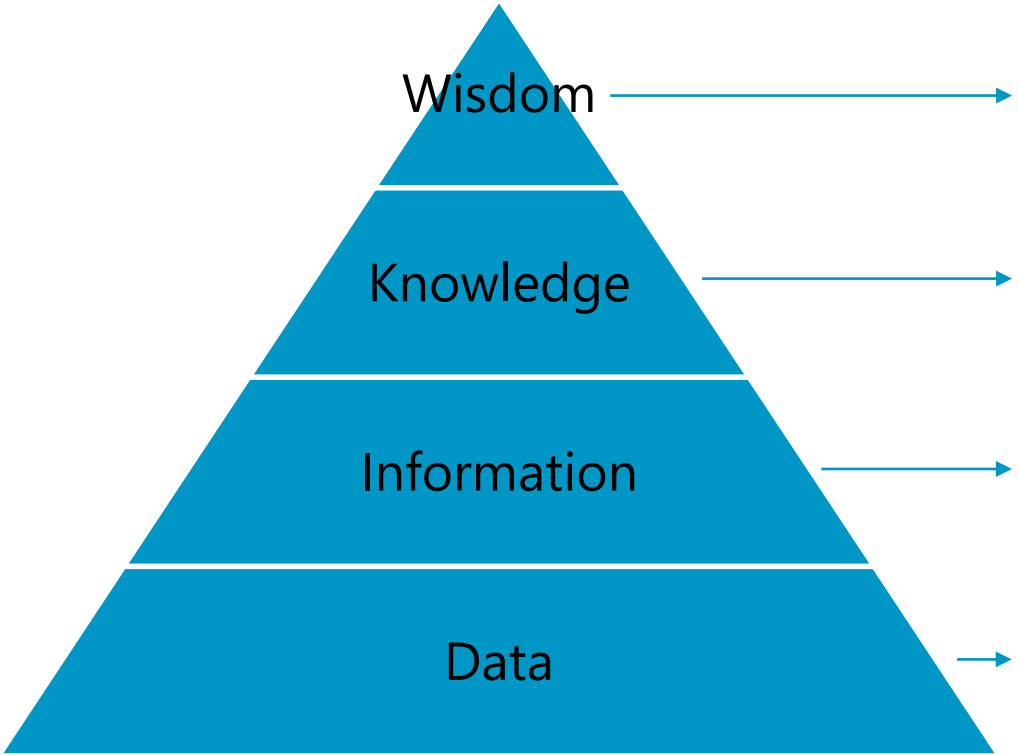
The Wilder Collaborations Factors Inventory



The Wilder Collaborations Factors Inventory: *Categories*

Environment:

History of collaboration or cooperation in the community



Applied

"I better stop the car!"

Context

"The traffic light I am driving toward has turned red."

Meaning

South-facing traffic light on corner of 1st and Main is red.

Raw

192.234.235.245.678,v2.0,red

HOSPITAL	Total Dollars Raised	Restricted	Unrestricted	Total Cash Received	Total Number of Donors	Total Endowment	Total Cost	Labor Cost	General Cost
1	$ 72,006,496	$ 44,722,666	$ 27,283,830	$ 37,685,053	120,262	$ 46,826,213	$ 7,927,221	$ 2,702,785	$ 5,224,435
2	$ 45,328,381	$ 43,672,211	$ 1,656,170	$ 28,975,252	27,406	$ 982,925,821	$ 5,150,215	$ 2,954,436	$ 2,195,779
3	$ 76,517,125	$ 40,686,210	$ 35,830,915	$ 44,411,991	51,283	$ 393,015,432	$ 9,703,376	$ 6,275,689	$ 3,427,688
4	$ 107,065,375	$ 69,334,713	$ 37,730,662	$ 81,449,000	206,280	$ 502,009,715	$ 20,089,714	$ 7,764,190	$ 12,325,524
5	$ 50,049,900	$ 32,082,600	$ 17,967,300	$ 41,437,410	19,087	$ 550,000,000	$ 7,156,700	$ 4,300,200	$ 2,856,500
6	$ 23,007,368	$ 8,917,428	$ 14,089,940	$ 25,930,216	8,996	$ 50,891,951	$ 3,953,510	$ 2,240,800	$ 1,712,710
7	$ 166,236,516	$ 152,618,566	$ 13,617,950	$ 93,367,079	54,931	$ 271,616,114	$ 13,789,185	$ 7,919,417	$ 5,869,768
8	$ 91,762,573	$ 60,806,246	$ 30,956,327	$ 52,207,877	31,005	$ 1,209,510,612	$ 8,623,821	$ 5,551,225	$ 3,072,596
9	$ 77,468,268	$ 4,062,341	$ 73,405,928	$ 48,561,351	8,453	$ 330,000,000	$ 5,540,170	$ 3,807,879	$ 1,732,291
10	$ 95,502,495	$ 77,316,977	$ 18,185,518	$ 66,598,324	56,444	$ 416,087,000	$ 17,573,464	$ 11,414,455	$ 6,159,009
11	$ 13,134,428	$ 9,274,593	$ 3,859,836	$ 16,902,041	22,136	$ 139,300,000	$ 3,543,639	$ 2,138,074	$ 1,405,565
12	$ 47,196,954	$ 40,264,197	$ 6,932,757	$ 53,484,357	28,536	$ 966,395,030	$ 6,585,101	$ 4,942,743	$ 1,642,358
13	$ 80,461,690	$ 62,822,131	$ 17,639,559	$ 42,481,633	93,157	$ 114,891,033	$ 8,017,463	$ 4,347,691	$ 3,669,772
14	$ 21,600,328	$ 14,647,226	$ 6,953,102	$ 15,875,343	14,872	$ 162,888,713	$ 4,040,747	$ 2,318,393	$ 1,722,354
15	$ 27,276,284	$ 21,451,895	$ 5,824,390	$ 19,880,352	17,622	$ 1,500,000,000	$ 2,658,419	$ 1,801,750	$ 856,669
16	$ 40,712,842	$ 25,375,483	$ 15,337,359	$ 46,455,088	42,016	$ 131,900,000	$ 7,761,862	$ 4,109,424	$ 3,652,438
17	$ 20,166,873	$ 15,956,552	$ 4,210,321	$ 22,499,704	8,973	$ 233,900,000	$ 3,490,455	$ 1,770,492	$ 1,719,963
18	$ 14,441,404	$ 10,711,438	$ 3,729,966	$ 15,543,460	6,473	$ 249,887,991	$ 2,080,653	$ 1,605,644	$ 475,009
19	$ 24,224,830	$ 21,951,156	$ 2,273,674	$ 14,439,737	11,917	$ 302,668,568	$ 2,976,844	$ 1,973,427	$ 1,003,416
20	$ 60,430,701	$ 54,868,002	$ 5,562,698	$ 29,985,188	21,683	$ 696,000,000	$ 5,998,038	$ 3,326,172	$ 2,671,867
21	$ 28,622,019	$ 24,762,286	$ 3,859,733	$ 19,133,287	21,497	$ 84,595,921	$ 5,924,472	$ 3,746,705	$ 2,177,767
22	$ 30,013,099	$ 27,454,399	$ 2,558,700	$ 35,334,122	9,596	$ 35,812,000	$ 4,977,011	$ 3,453,891	$ 1,523,120

Membership Characteristics:

Mutual respect, understanding and trust

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Communications:

Open and frequent communications

Membership Characteristics:

Ability to compromise

First benchmarking survey is conducted

1997 1999 2001 2003 2005 2007 2009 2011 2013 2015 2017 2019 2021 2023

Benchmarking report is unblinded for the first time

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First benchmarking survey is conducted

Analytics maturity model is introduced.

1997 1999 2001 2003 2005 2007 2009 2011 2013 2015 2017 2019 2021 2023

Benchmarking report is unblinded for the first time

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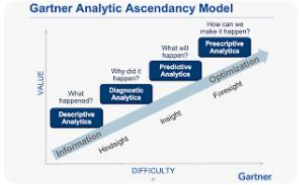
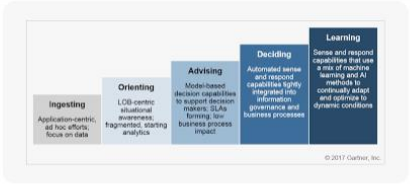
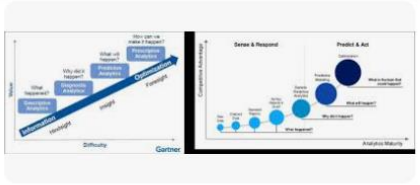


Adverity
Analytical Maturity in Marketing ...



G Business Insights & Trends - Gartner
Five Levels of Streaming Analytics Maturity

Jirav
Data analytics maturity models



Measurelab
The nine signs of analytics maturity ...

Collidu
Analytics Maturity Model PowerPoint and ...

ResearchGate
Analytics Maturity Model (Gartner, 2019 ...

Jirav
Data analytics maturity models

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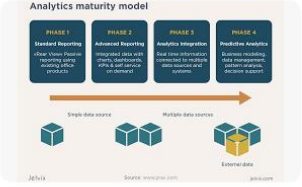

Jelvix
analytics with a data maturity model

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What is Analytics Maturity Fr...

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Towards Data Science
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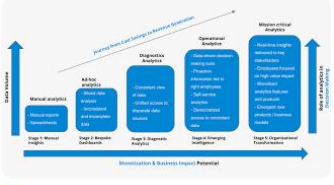

Imply
Imply's real-time analytics maturity ...

Yellowfin BI
The Embedded Analytics Maturity Curve ...

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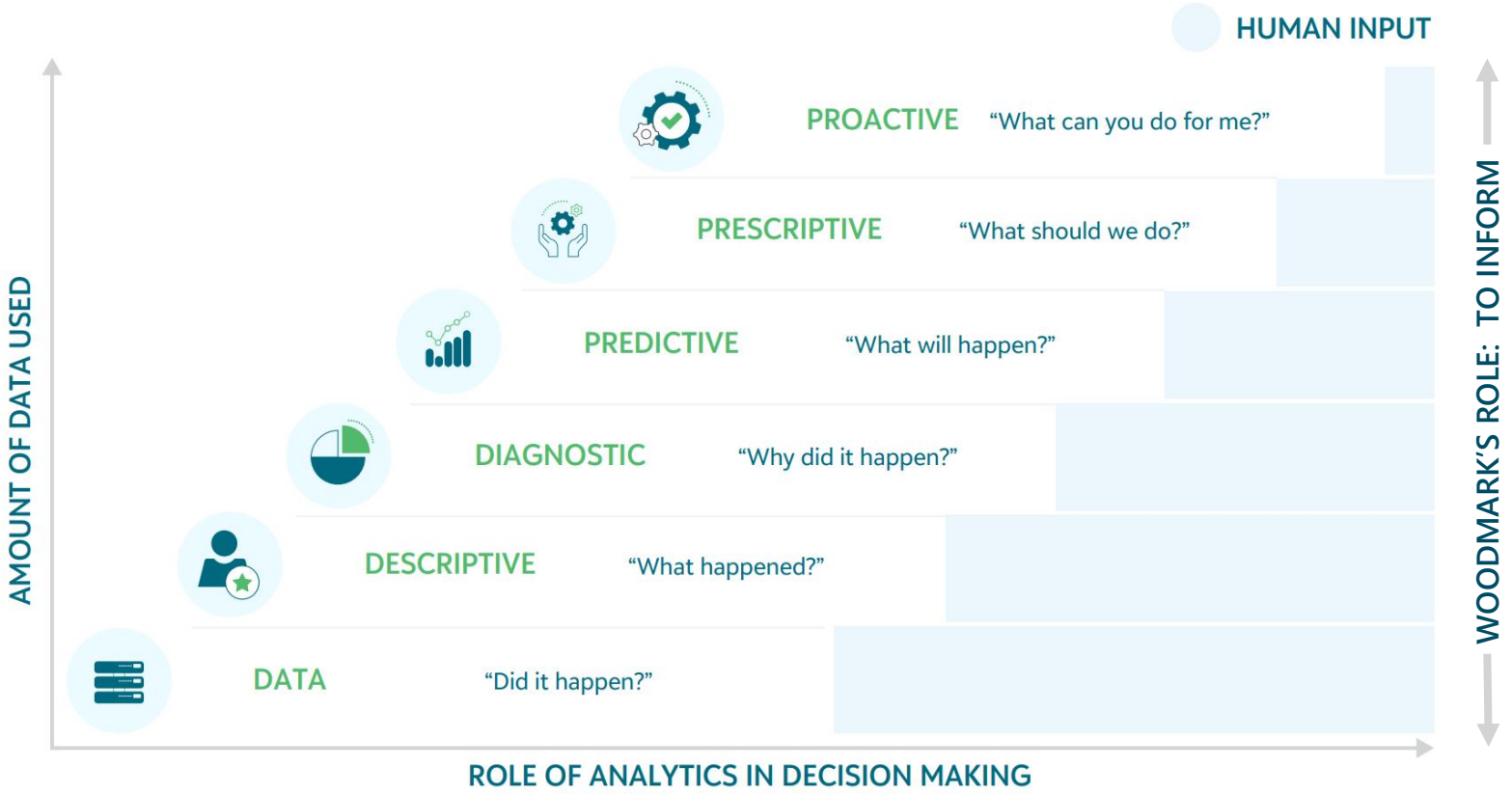
Analytics Maturity Model



Resources:

Our collaborative group has adequate "people power" to do what it wants to accomplish.

First benchmarking survey is conducted

Analytics maturity model is introduced

1997 1999 2001 2003 2005 2007 2009 2011 2013 2015 2017 2019 2021 2023

Benchmarking report is unblinded for the first time

Staff position is added

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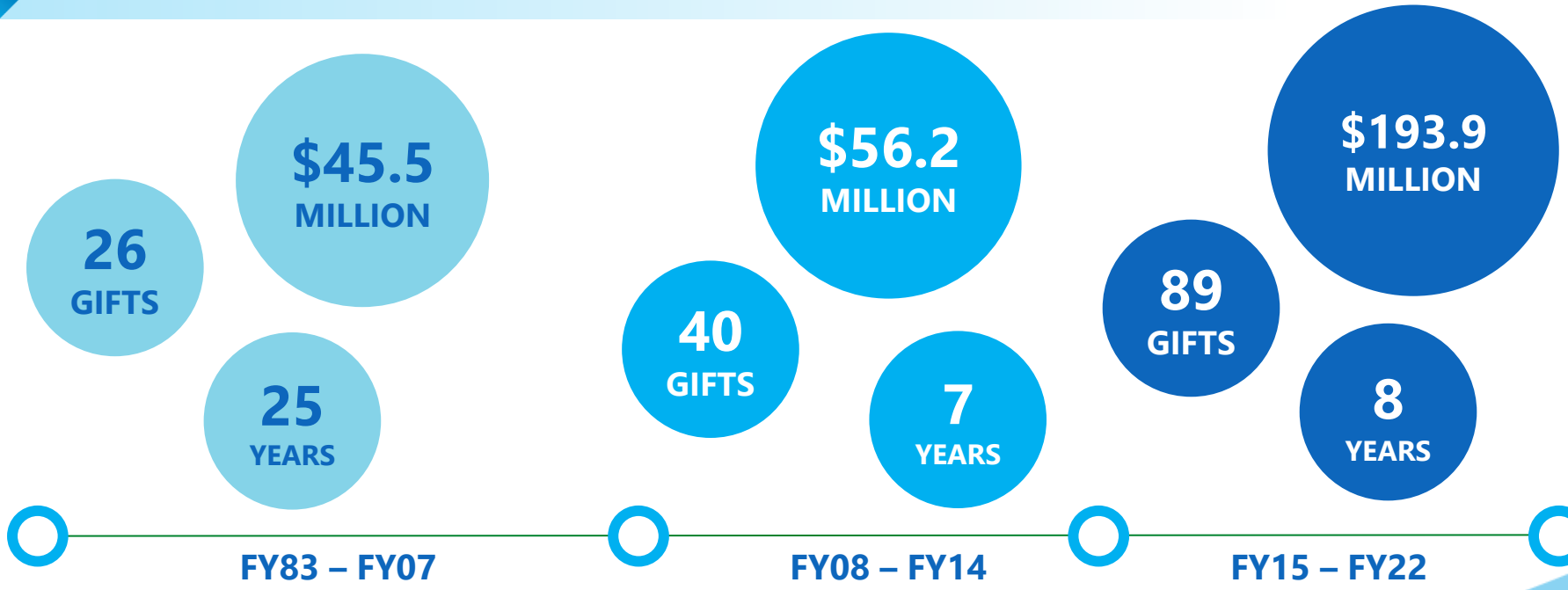
Members' five largest gifts by size and frequency

Woodmark tracks the five largest gifts ever received by each member. This list includes 137 gifts ranging in size from $3M to $300M. The gifts in the list were received between 1987 and March 2022.

When the list of members' five largest gifts is sorted into four groups with roughly the same number of gifts in each group, you can see that *the frequency of members receiving a qualifying gift is accelerating*. The number of years in which the first 34 gifts on the list were received is 21 years; the number of years for the most recent 35 gifts is 2.5 years.

Time Period (CY)	Number of years	Number of gifts	Median gift size
1987 - 2007	21	34	$20M
2008 - 2015	8	35	$25M
2016 - Q3 2019	3.75	33	$20M
Q4 2019 - Q1 2022	2.5	35	$15M

INVESTMENT-LEVEL GIFTS



Process and structure:

Members share a stake in both process and outcome

Purpose:

Unique purpose

FY21 Annual Giving

Organization	Dollars Raised	% of Total Dollars	Donor Count	% of Total Donors	Dollars per Donor	Total Costs	Cost to Raise a Dollar
Gray Quartile Median	$9,817,587	6%	32,691	82%	$300	$1,442,927	$0.15
Shop H	$6,996,343	9%	10,194	37%	$686	$395,516	$0.06
Red Quartile Median	$5,976,136	9%	21,562	71%	$277	$1,841,102	$0.31

Organization	Dollars Raised	% of Total Dollars	Donor Count	% of Total Donors	Dollars per Donor	Total Costs	Cost to Raise a Dollar
Shop A	$44,093,081	27%	185,782	52%	$237	$11,020,769	$0.25
Shop B	$13,281,577	22%	54,978	61%	$242	$2,427,992	$0.18
Shop C	$12,499,594	11%	71,899	65%	$174	$4,179,671	$0.33
Shop D	$12,269,914	10%	54,128	93%	$227	$478,041	$0.04
Shop E	$9,817,587	5%	32,691	54%	$300	$2,793,379	$0.28
Shop F	$7,818,592	4%	7,059	61%	$1,108	$1,258,960	$0.16
Shop G	$7,498,368	5%	14,624	65%	$513	$1,442,927	$0.19
Shop H	$6,996,343	9%	10,194	37%	$686	$395,516	$0.06
Shop I	$6,000,894	11%	19,595	95%	$306	$310,602	$0.05
Shop J	$5,976,136	11%	56,199	65%	$106	$1,841,102	$0.31
Shop K	$4,670,045	2%	16,322	30%	$286	$1,409,340	$0.30
Shop L	$3,984,627	5%	21,562	72%	$185	$2,135,014	$0.54

vs. Red Quartile Median

Dollars Raised: 🟢

Donor Count: 🔴

Dollars per Donor: 🟢

Cost to Raise Dollar: 🟢

Gray Quartile Top Ranked

Dollars Raised: Shop A

Donor Count: Shop D

Dollars per Donor: Shop G

Cost to Raise Dollar: Shop H

Red Quartile Top Ranked

Dollars Raised: Shop B

Donor Count: Shop E

Dollars per Donor: Shop J

“It's not what you look at that matters, it's what you see.”

- *Henry David Thoreau*

Q4 performance measurement plan

Objective/Measure	Points (Meet 100% Goals)	Points (Maximum)	FY Goal	FYTD Goal (Q1,2,3,4)	FYTD Actual	% FY Goal Achieved	Points Earned
1. Gifts Closed (Dollars)	30	50	$3,992,201.00	$3,992,201.00	$9,527,646.84	239%	50.0
2. Solicitations submitted (Number)	20	25	71	71	73	103%	20.6
3. Face to Face Visits (Number)	20	25	194	194	76	39%	7.8
4. Teamwork/Special Projects/Working Relationships	10	15	10	10	13	130%	13.0
5. Solicitations Funded (%)	10	15	38%	38%	82%	215%	15.0
6. Prospects added to Pipeline (Number)	5	10	12	12	2	17%	0.8
7. Total Contacts (Number)	5	10	540	540	339	63%	3.1
	100	150					

Total Points 110.4

Points Earned Guide

	Q1	Q2	Q3	Q4
Did Not Meet Expectations	<19	<38	<56	<75
Needs Improvement	19	38	56	75
Meets Expectations	25	50	75	100
Exceeds Expectations	31	63	94	125
Exceptional Performance	38	75	113	150

It's your turn

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“If you want to go fast, go alone. If you want to go far, go together.”

- *African proverb*

Thanks!

Fred Scarborough, CFRE
Executive Vice President,
Chief Communications
and Development Officer
Arkansas Children's

Rona Pryor
Director of research & insight
The Woodmark Group
ronap@woodmark.org