

# Beyond Commissions: Measuring the Impact of Your Travel Program in Metrics



# Caliopy Glaros

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Caliopy Glaros is the Founder of Philanthropy without Borders, a boutique consultancy which provides strategic guidance on philanthropic travel, fundraising, and strategic planning. Part strategist, part facilitator, part project manager, Caliopy draws from her unique skills in donor travel, fundraising, and intercultural communication to help clients develop programs that inspire generosity, cultivate empathy, deepen learning, and connect people across cultures in mutually beneficial ways. Caliopy has an academic background in Anthropology and Adult Learning, and is a former development officer.



## Beth Ray-Schroeder, Senior Director of Duke Travels

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**Beth Ray-Schroeder** is Senior Director of Duke Travels in the Office of Alumni Engagement and Development at Duke University. At Duke since 2005, Beth has also launched and directed alumni education initiatives. In 2014, she began to focus solely on the priorities of the educational travel program. More than doubling offerings, participation and revenue, she and her team now organize more than 45 engagement and stewardship travel programs annually, which comprise vendor itineraries and customized programs in partnership with various Duke entities, and are primarily led by Duke faculty.

Prior to coming to Duke, Beth lived and worked in Spain and Germany for 17 years. She held positions as a software developer in Madrid, as international systems project manager at Deutsche Lufthansa AG in Frankfurt am Main, and as an organizational consultant in Austria, Germany and Switzerland. She holds a B.S. in Computer Science and the equivalent degree in Psychology from Duke University, and a M.S. in Organizational Psychology from Johannes Gutenberg University of Mainz.




## **Karl Egloff**, Director of Travel & Conservation at WWF

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**Karl Egloff** is the Director of Travel & Conservation at WWF, overseeing the organization's donor travel program and close relationship with Natural Habitat Adventures to collaborate on marketing and operating wildlife and nature-focused adventures for its supporters. In addition, he assists WWF and its partners on sustainable tourism programs and initiatives to better engage the travel industry. He grew up in Alaska before attending Montana State University and later started his career guiding and managing travel programs around the world. After settling in the Washington D.C. area, he received a Masters of Tourism Administration with a focus in sustainable tourism from The George Washington University. As someone who loves the outdoors, nature and travel he is thrilled to help travelers visit our remarkable natural areas to create meaningful experiences and furthers WWF's mission.



Abstract geometric lines in the top-left corner of the slide, consisting of several thin, dark grey lines that intersect to form a series of overlapping, irregular polygons.

Why did you choose to  
attend this session?

# The WHY of Metrics

- To justify the existence of the travel program so that your organization can invest in you and your team
- To measure the impact of the travel program so that your organization can fully leverage the benefits of a travel program
- To demonstrate how the travel program aligns with the organization's mission, strategic priorities, and revenue goals so that you have a seat at the table when decisions are made that impact you

# You will leave this session with

- Your Travel Program's WHY Statement
- Samples of metrics that wow your leadership
- A process for acquiring metrics at your organization
- Powerful techniques in pairing qualitative stories with quantitative statistics that influence and engage audiences
- 2 Case Studies from colleagues who used metrics to advocate for their programs and successfully made big changes that positively impacted their jobs, their programs, their travelers, and their organizations



# The Golden Circle

## WHAT

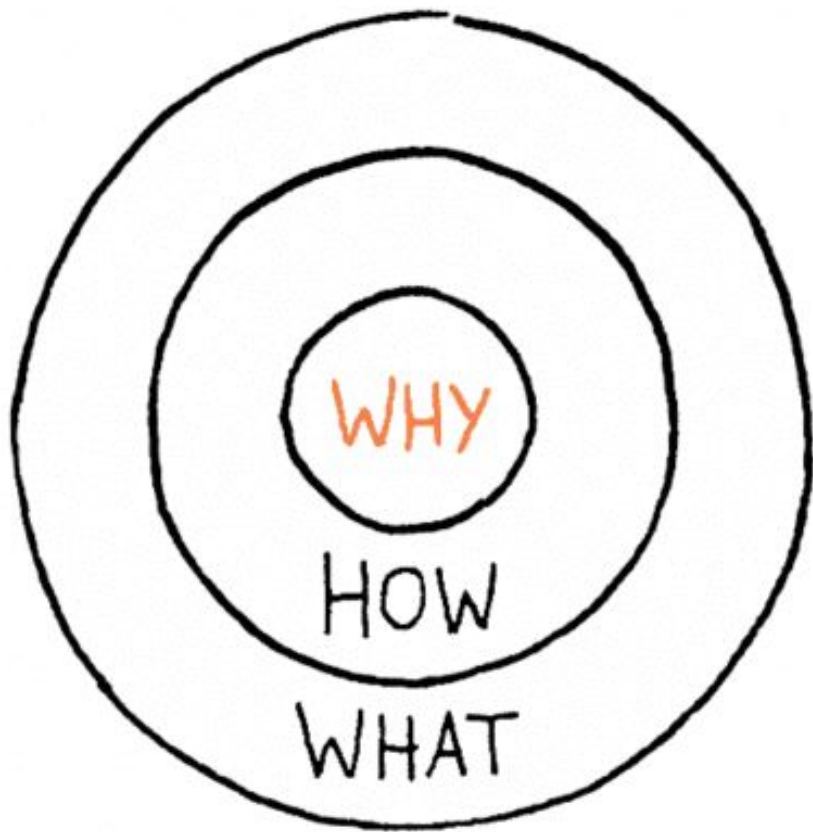
Every organization on the planet knows WHAT they do. These are products they sell or the services

## HOW


Some organizations know HOW they do it. These are the things that make them special or set them apart from their competition.

## WHY

Very few organizations know WHY they do what they do. WHY is not about making money. That's a result. WHY is a purpose, cause or belief. It's the very reason your organization exists.







Activity: Create your WHY Statement for your travel program

“We do \_\_\_\_\_ so that \_\_\_\_\_”

“To \_\_\_\_\_ so that \_\_\_\_\_”

Groups of 2

5 Minutes

Use your worksheet

# Beyond Commissions: Measuring the Impact of your Travel Program

Beth Ray-Schroeder  
Senior Director, Duke Travels



In the Alumni Association – Duke Alumni Travel:

## Originally a commission-driven program to engage affinity spirit

Partnered with “Alumni Education” stronger focus as an educational engagement program – but \$\$\$

Constant justification and at risk

Alumni Affairs’ metrics were holding the program down and making justifications, growth and success difficult – small groups, limited offerings

## Seeking the potential and thinking about real value

We are in the relationship business

Not just engagement - stewardship and cultivation

## Began to establish the program as “experts in travel” and meet with entities across campus

Offered programs for museum and Lemur Center

Anecdotes on donor gifts began trickling in

Needed data to show the value of the program

## So I asked the development office to run some numbers:

Turned out at Duke, we know that engaged alumni give 3x more than alumni, who don’t volunteer or go to events, but Travelers give 10x more than engaged alumni.



This was a revelation for senior leadership and I got their attention.



## Changing the Narrative

Commissions are a drop in the budget bucket

Commissions cover programmatic costs, but that does not define the success

Travel is uniquely positioned in the engagement event toolkit to create a lasting bond due to its experiential nature and the length of time spent together.

## So what is the true value?

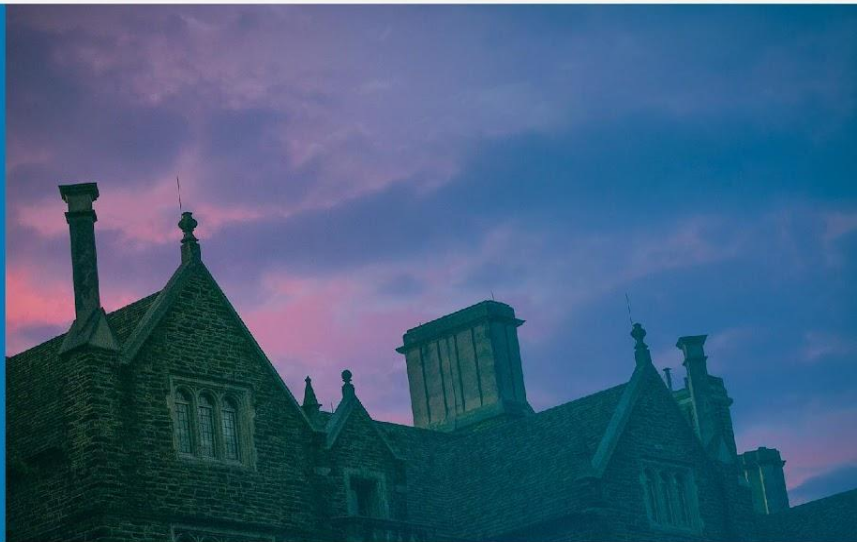
Stewardship of donors to deepen their lifelong relationship with Duke

Cultivation of donor gifts and time for Duke to achieve its goals



## Duke Travels “Why” Statement

*To* provide meaningful life experiences to Duke supporters through educational travel that strengthen their relationship with Duke University *so that* they give more of their time and money in volunteering and philanthropy to Duke.



## Duke Travels Metrics

### Traveler Giving

- █ % of “active” alumni are donors (█)
- █ % of “active” travelers are donors (█\*\*)
- █ % of active alumni are donors with gifts > \$1000
- █ % of travelers are donors with gifts > \$1000

\*\*\* █ Travelers: Total Lifelong Legal Giving \$ █ million

Total Soft Giving \$ █ billion

- Among those who gave before traveling, █ % continue to give after traveling
- Among those who did not give before travel, █ % began to give after traveling

## Total Giving Perspectives – FY2022

- █% of active alumni gave a gift in FY2022
  - Total FY22 giving is \$█ million (█, █ gifts)
  - Average giving is \$█
  
- █% of travelers gave a gift in FY2022 (█% in FY23 so far)
  - Total FY22 giving is \$█ million (FY23 giving is \$█ million so far) (█ gifts)
  - Average giving is \$█



## Traveler Event Participation

- **??%** of active constituents have participated in a Duke AED tracked event
- Among all who have traveled, **■**% participated in a Duke AED tracked event
- Among those interested in travel, but have not yet traveled, **■**% have attended a Duke AED tracked event
- **Reunions** event is the most frequently attended event the year that someone travels

## Traveler Volunteer Engagement

- ??% of active constituents are volunteers
- Among all who have traveled, █% are or became volunteers (this could be separated out)
- **AAAC Interviewers, Alumni Board and Reunion committees** have the most frequent volunteer roles of travelers and those interested in travel

## We are now **Duke Travels**

- ❑ Not just alumni any more – donors
- ❑ Now in merged entity of alumni engagement and university development
- ❑ 45-50 programs annually, 850 travelers annually
- ❑ 3-8 customized stewardship programs with campus partners led by their experts and a Dev officer
- ❑ Team growth from 1FT salaried and 1FT admin to 3FT salaried and a shared FT admin
- ❑ Promotions within team
- ❑ Campus outreach – successes feed the loop and create more anecdotes and data
- ❑ Pandemic-proof because value not in commissions
- ❑ Recognition not scrutiny



# Questions?





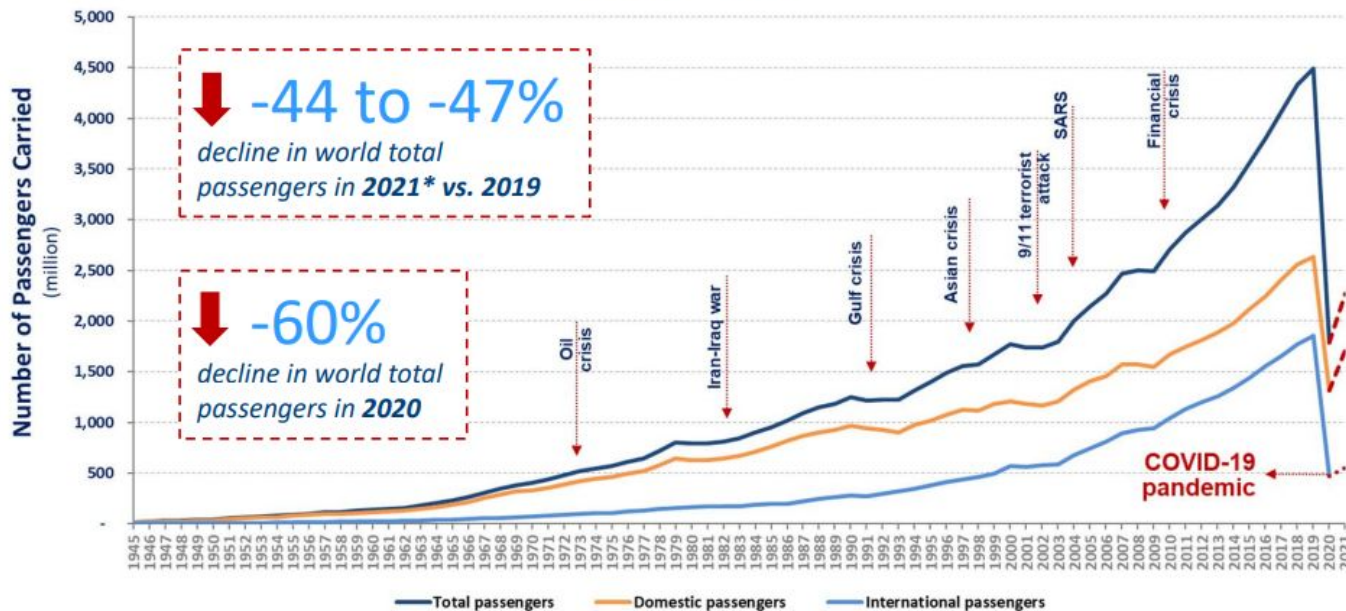
BEYOND COMMISSIONS: MEASURING THE IMPACT  
OF YOUR TRAVEL PROGRAM

Karl Egloff, WWF



## KEY QUESTIONS

### World passenger traffic evolution 1945 – 2021\*



## WWF'S TRAVEL & CONSERVATION PROGRAM

### VIP, Board & President Travels

- 6-8 private trips per year

### Special Major Donor Trips: WWF Insider Journeys

- 4-6 trips per year for Partners in Conservations and Legacy Circle Members



### Membership Travel with Nat Hab

- 75+ trips
- 750 + departures
- 7,500 + travelers per year
- Fixed licensing fee
- 1% Services fee (commission)



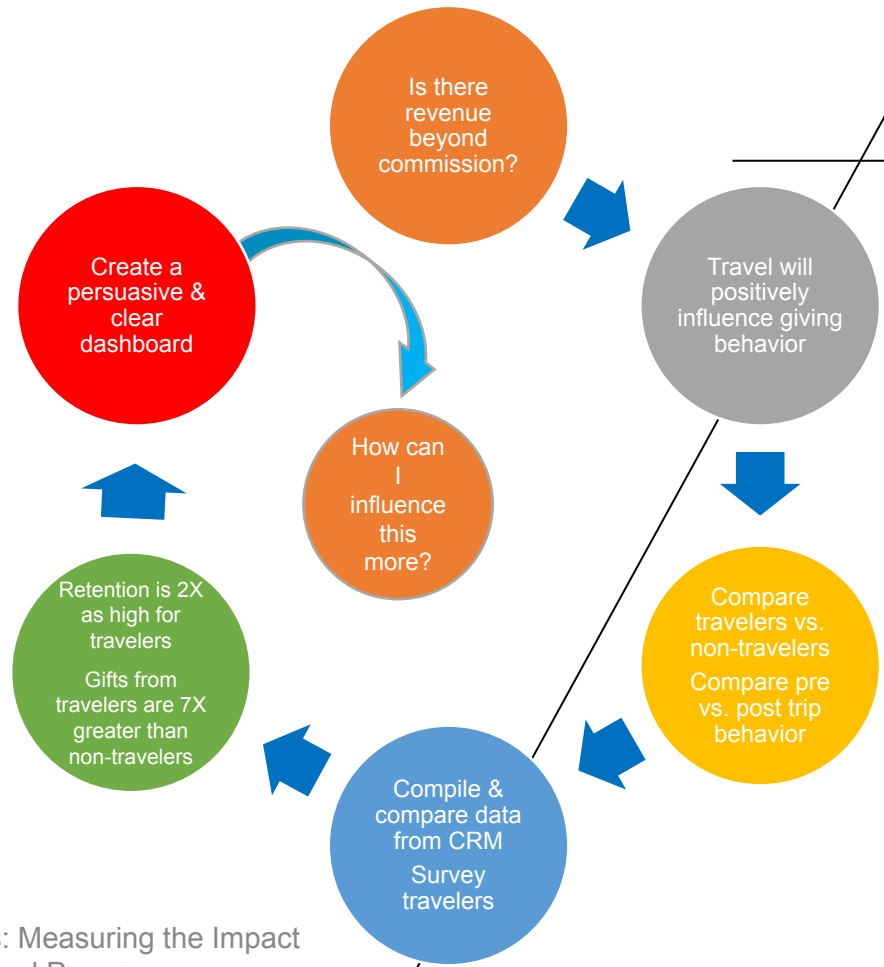
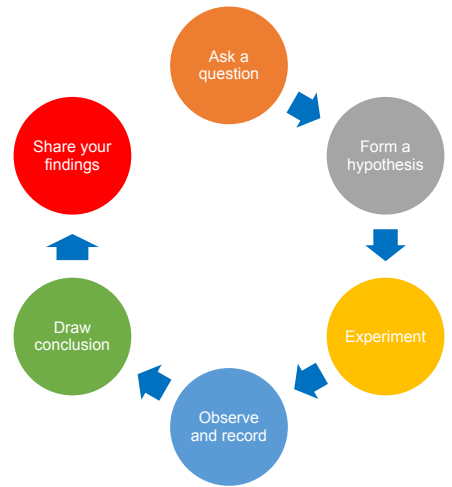
## WWF Travel's Mission

To give people opportunities to observe the world's diversity firsthand, immersing them in nature and inspiring them to actively care about conservation.





SCIENTIFIC METHOD





Travel


[Dashboard](#)
[Trips](#)
[Travelers](#)
[Bookings](#)
[Webinar Attendees](#)
[Webinars](#)
[Catalog Requests](#)
[Vouchers](#)
[Mailing Exclusions](#)
Annual Summary [More](#)

Fiscal Year	# Trips	# Travelers	# Gifts	# New Donors After Trip	% Members	% Donors
2014	3,218	3,009	24,471	161	14.9%	33.0%
2015	3,880	3,614	29,347	194	16.5%	33.1%
2016	3,977	3,691	26,791	179	14.5%	30.6%
2017	4,886	4,590	25,447	249	14.0%	27.7%
2018	4,589	4,371	22,142	255	12.9%	26.2%
2019	6,162	5,693	36,628	308	14.2%	29.5%
2020	6,095	5,663	31,474	258	15.1%	30.2%
2021	649	616	3,785	9	17.5%	30.5%
2022	6,658	5,920	31,142	129	16.5%	28.6%
2023	3,321	3,153	19,014	40	17.0%	29.1%

Traveler Giving Summary [Filters](#) [More](#)TRIP CATEGORY: [Travel: NHA Member Trip](#) [Apply](#) [Reset](#)

Fiscal Year	Travel Acquired Giving	Non-Travel Acquired Giving	Total Traveler Giving
2015	\$11,320	\$1,145,202	\$1,156,522
2016	\$21,029	\$1,213,228	\$1,234,257
2017	\$29,839	\$6,252,123	\$6,281,961
2018	\$67,019	\$1,487,166	\$1,554,185
2019	\$104,691	\$1,633,863	\$1,738,554
2020	\$134,341	\$1,633,711	\$1,768,053
2021	\$135,924	\$4,419,650	\$4,555,574
2022	\$235,565	\$1,963,344	\$2,198,909
2023	\$37,745	\$997,232	\$1,034,977
Future lifetime value	\$6,755,130	\$23,087,051	\$29,842,181

Lifetime Summary [More](#)Trip Type: [NHA Member Travel](#) [Apply](#) [Reset](#)

Traveler/Non-Traveler	Total Giving	Avg Total Giving	Avg Gift	Avg # Gifts	% with Planned Gifts	% with \$1MM+ Giv...	Avg Lifetime Value
Non-traveler	\$1,463,507,009	\$85	\$38	2.2	0.07%	0.01%	\$34
NHA Member Traveler	\$35,628,307	\$1,198	\$265	4.5	1.38%	0.32%	\$919

Trip Type: [Member\(NatHub\) Travel](#)One Year Before and After Trip [More](#)

Donor/Not a Donor	# Constituents	# Donors 1 Yr Bef Trip	% Donors 1 Yr Bef Trip	Revenue 1 Yr Bef Trip	Revenue per Donor 1 Yr Bef Trip	# Donors 1 Yr Aft Trip	% Donors 1 Yr Aft Trip	Revenue 1 Yr Aft Trip	Revenue per Donor 1 Yr Aft Trip	% New Max ...	Avg Increase...
Not a Donor Before Trip	27,559	0	0.0%	\$0	\$0	652	2.4%	\$229,823	\$8	2.4%	\$1
Donor Before Trip	8,607	4,789	55.6%	\$3,298,101	\$383	2,928	34.0%	\$1,894,459	\$220	8.6%	\$3

More

Donor/Not a Donor	# Constituents	# New Inte...	% New Intenders 1...	# New Partn...	% New Partners ...	# New Leadership Pa...	% New Lead...	# New Major Don...	% New Majo...	# New Advo...	% New Advo...
Not a Donor Before Trip	27,559	7	0.03%	55	0.20%	9	0.03%	2	0.00%	412	1.54%
Donor Before Trip	8,607	39	0.47%	89	1.13%	17	0.20%	9	0.10%	347	5.40%

Two Years Before and After Trip [More](#)

Donor/Not a Donor	# Constituents	# Donors 2 Yr B...	% Donors 2 Yr Bef...	Revenue 2 Yr Bef Trip	Revenue per ...	# Donors 2 Yr Aft...	% Donors 2 Yr Aft T...	Revenue 2 Yr Aft Trip	Revenue per ...	% New Max ...	Avg Increase...
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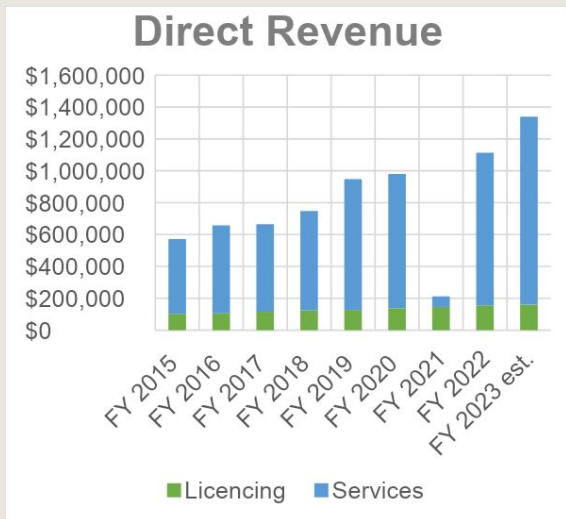
2023 20XX

Beyond Commissions: Measuring the Impact of Your Travel Program

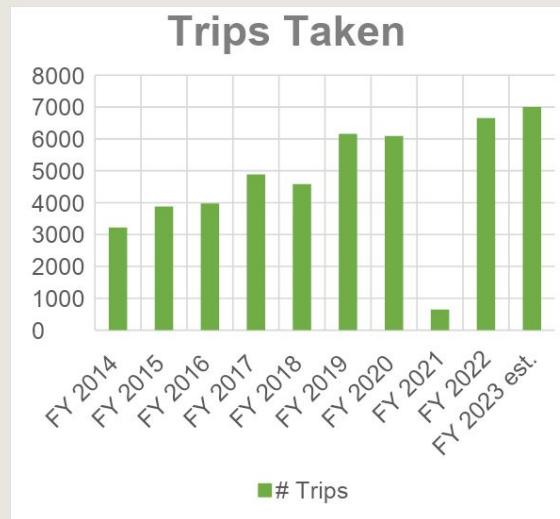
PRESENTATION TITLE

## KEY MEASURABLES MOST BASIC & MOST ACCURATE

### Direct Revenue Example



### Number of Trips taken Example

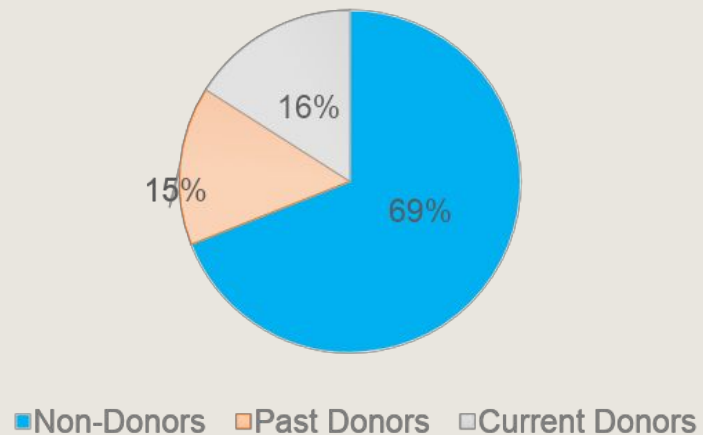




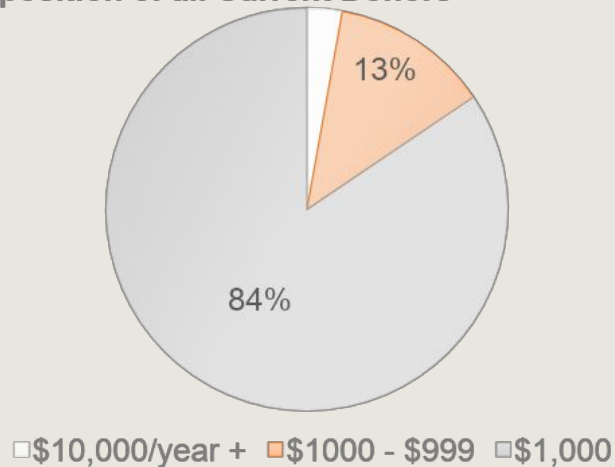
KEY MEASURABLES  
MOST BASIC & MOST ACCURATE

Percent of Members/Donors  
Example

All Travelers on all Trips

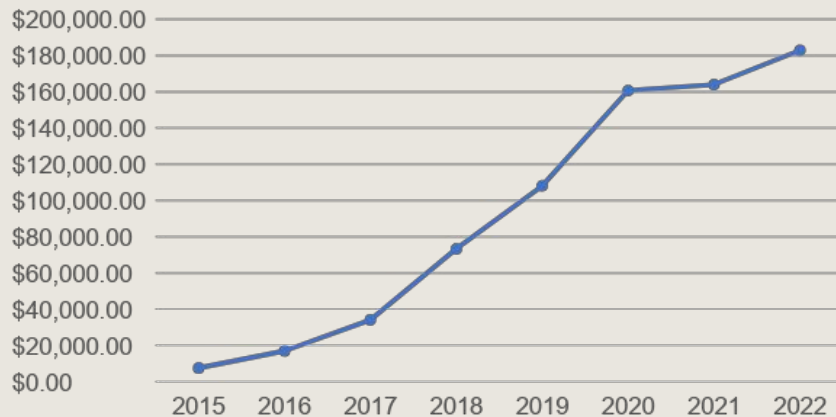


Composition of all Current Donors



KEY METRICS  
COMPLEX AND STILL ACCURATE  
NEW TO FILE TRAVELERS

- Annual Giving from New to File Travelers



KEY METRICS  
COMPLEX AND STILL ACCURATE  
COMPARING TRAVELERS TO NON TRAVELERS

Compare members who travel to those who do not

**Members Traveling vs. Non-Traveling Members**

- **15X** Average total lifetime giving
- **7X** Average gift size
- **32X** More Likely to have \$1M gift capacity
- **19X** More likely to have a planned gift
- **\$102** Acquisition cost for each new member
- **\$75 - \$100** Acquisition “payment” for each new member through travel





KEY METRICS  
MORE COMPLEX AND STILL ACCURATE  
COMPARING PRE & POST TRIP BEHAVIOR

**Existing Donors 12 Months After Nat Hab Member Trip**

- **39** New Legacy Circle Members (Planned Giving)
- **19** New Leadership Partners (\$10,000/year)
- **86** New Partners (\$1,000/year)
- **62%** Donor retention rate
- The overall retention rate for general WWF membership is about 46% from one year to the next.

**New to File Donors 12 Months After Nat Hab Member Trip**

- **7** New Legacy Circle Members
- **8** New Leadership Partners
- **54** New Partners
- **643** New Donors

**Existing Donors 24 Months After Nat Hab Member Trip**

- **82** New Legacy Circle Members
- **35** New Leadership Partners
- **157** New Partners
- **80%** Donor retention rate

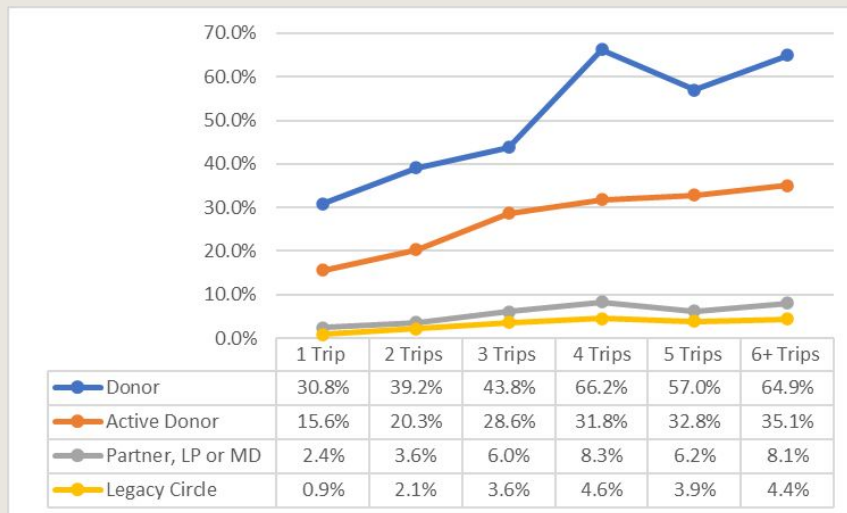
**New to File Donors 24 Months After NHA Member Trip**

- **18** New Legacy Circle Members
- **17** New Leadership Partners
- **100** New Partners
- **1,143** New Donors





## KEY METRICS MORE COMPLEX AND STILL ACCURATE



**KEY MEASURABLES  
MOST COMPLEX AND HARDEST TO MEASURE  
“THE DONOR/TRAVELER JOURNEY”**



1. **November 1998**      **Joined WWF Membership**
  2. **2012 - 2017**      **\$1,000 annual gifts to WWF**
  3. **February 2018**      **Joined Monarch Butterfly Donor Trip For Partners**
  4. **May 2018**      **\$2,500 gift to WWF**
  5. **March 2019**      **\$10,000 gift to WWF**
  6. **April 2019**      **Joined Legacy Circle Program**
  7. **May 2020**      **\$10,000 gift to WWF**
  8. **May 2021**      **\$1,755,000 Bequest**
- **No connection between gift and travel in CRM**
  - **Interactions with six people from WWF**




**KEY MEASURABLES  
MOST COMPLEX AND HARDEST TO MEASURE  
“THE DONOR/TRAVELER JOURNEY”**

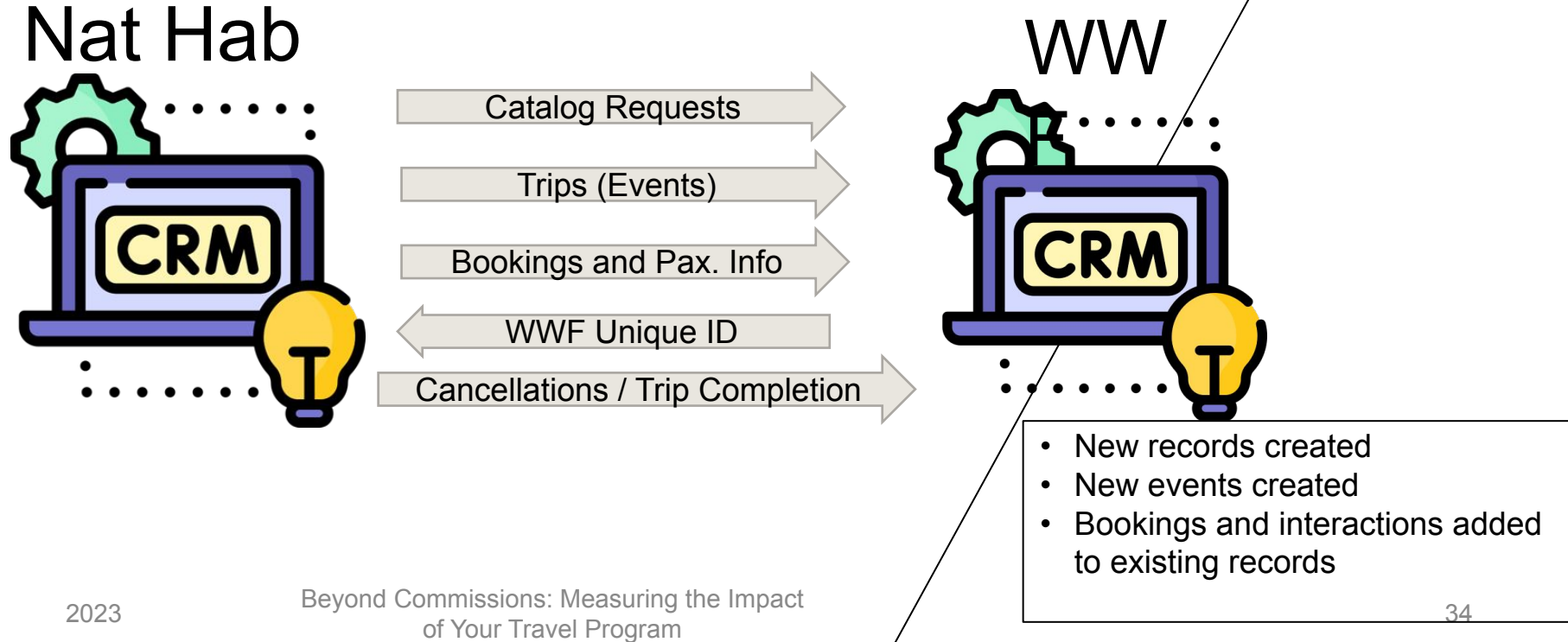
- Anecdotal evidence
- Influence of travel on a major gift
- Influence of travel on retention and increased giving
- Important of relationships between program staff, fundraisers, and travel
- Influence of feeling part of a community or close to the organization
- Influence of branding, messaging, content, and post-trip actions
- Causation and correlation
  - Big travel budgets = bigger gifts
  - Demographic influences (age, wealth, priorities, interests)
  - Chronological order events



KEY MEASURABLES  
MOST COMPLEX AND HARDEST TO MEASURE

- 
- **Avoid resting on your laurels**
  - **Beware of the devil's advocate**
  - **Share in success but don't take credit**
  - **Acknowledge gift officer and others, and thank them for using travel as a resources**

## WEEKLY CRM DATA SYNCS



A series of white, overlapping geometric lines and polygons on a black background, located on the left side of the slide. The lines form various shapes, including triangles and quadrilaterals, some of which are nested or intersecting.

Questions?

## What to do next

**STEP 1:** What are your organization's priorities and goals?

**STEP 2:** What metrics are important to your leadership? Document how the organization already tracks their goals and progress.

**STEP 3:** What metrics are important to you that may not be on the radar of leadership? Why are they important? What do those metrics convey?

**STEP 4:** Clarify your metrics statements. Create 5-7 statements that demonstrate impact based on steps 1-3. Example: "Travelers give 15X more than engaged alumni"

**STEP 5:** Work backwards from your statements to determine the data you. Are your current system and data processes sufficient to acquire this data?

**STEP 6:** Communicating your data:

1. A powerful story that illustrates a time when a trip made a big impact on a donor.
2. Your top three metrics statements that demonstrate impact.
3. Your travel program's WHY statement.



## **STEP 1: What are your organization's priorities and goals?**

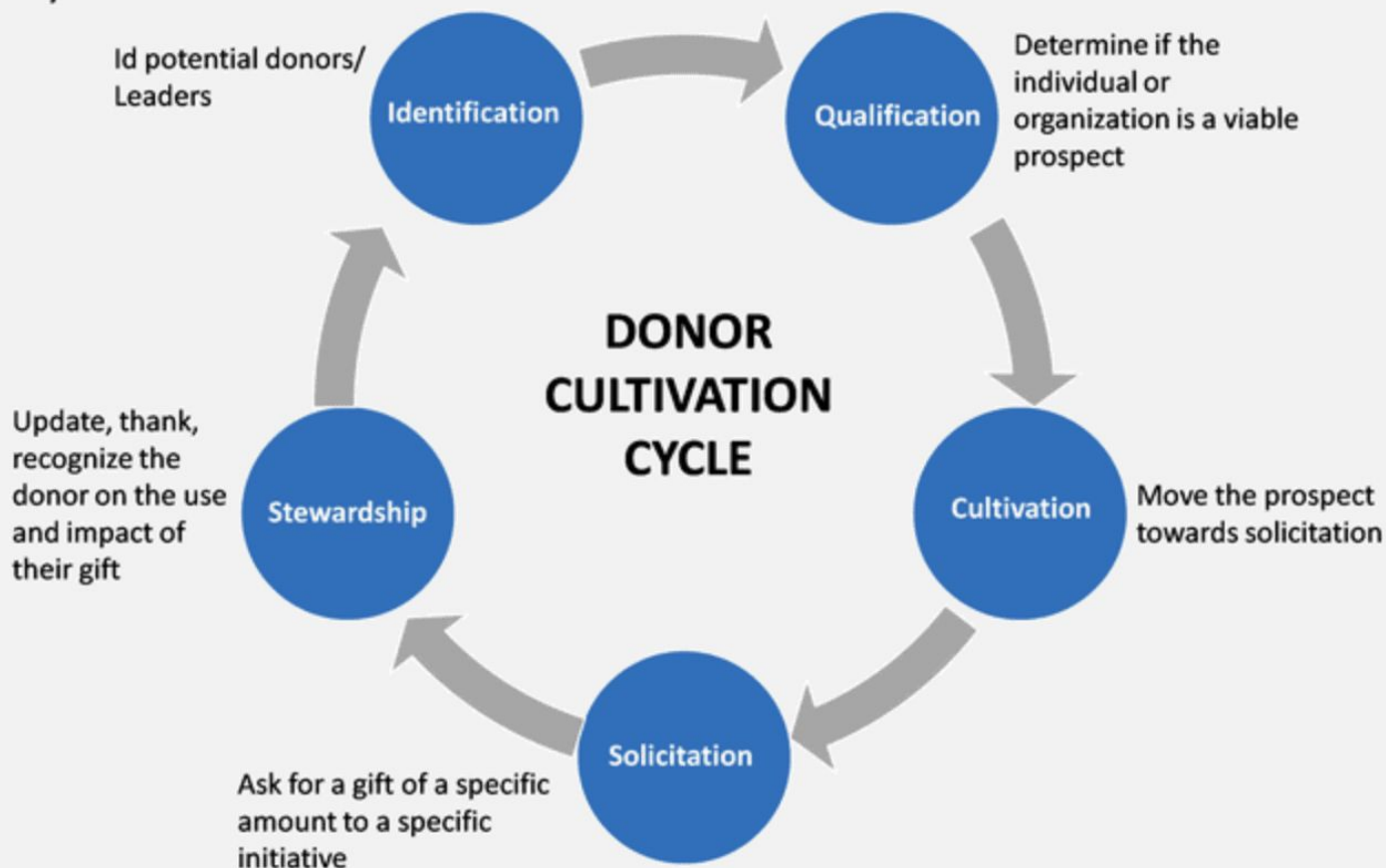
- How does your travel program align with the
  - mission statement,
  - strategic plan,
  - development plan,
  - or departmental plan

## STEP 2: What metrics are important to your leadership?

- Document how the organization already tracks their goals and progress
- At minimum you need:
  - A CRM that tracks giving/engagement
  - Tags to identify travelers

# DONOR CYCLE

Enter your sub headline here



## STEP 3: What metrics are important to you

- What may not be on the radar of leadership?
- Why are those metrics important?
- What do those metrics convey?

## STEP 4: Clarify your metrics statements

- Create 5-7 statements that demonstrate impact based on steps 1-3
- Start with hypothesis:
  - “After a trip, donors increase their giving”
  - “Travelers give more than alumni”

## **STEP 5: Work backwards from your statements to determine the data you need**

- Your database staff can help you if they know what you need
- If you can't get the data, identify the gaps.
- Work with your team on the processes you can control or influence



## STEP 6: Communicating your data and influencing others

- You will need:
  - A powerful story that illustrates a time when a trip made a big impact on a donor.
  - Your top three metrics statements that demonstrate impact.
  - Your travel program's WHY statement.
- Share the success: use your metrics to give credit to others



## Activity: Revisit your WHY Statement

“We do \_\_\_\_\_ so that \_\_\_\_\_”

Has it changed since we started?

Groups of 2 - 5 Minutes

Be prepared to share out

# You will leave this session with

- Your Travel Program's WHY Statement
- Samples of metrics that wow your leadership
- A process for acquiring metrics at your organization
- Powerful techniques in pairing qualitative stories with quantitative statistics that influence and engage audiences
- 2 Case Studies from colleagues who used metrics to advocate for their programs and successfully made big changes that positively impacted their jobs, their programs, their travelers, and their organizations