

Metrics Worksheet

STEP 1: What are your organization's or department'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 need. Are your current systems and processes sufficient to acquire this data?

STEP 6: Communicating your data. You will need:

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

Metrics Examples

Purpose of Metrics:

- To justify the existence of the travel program so that your organizations 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.

Traveler Profiles

- % of travelers are donors
- % of travelers are volunteers
- % of travelers are attending engagement & development events
- % of travelers that are in donor portfolios
- % of travelers have made planned gifts
- Median giving of first-time travelers
- Median giving of frequent travelers
- Total amount of giving from all travelers ever/in a given year
- Number of alumni activities/events attended?

Scope of Travelers within your Community

- % of members/alumni are travelers
- % of donors are travelers
- % of principle gift donors are travelers
- % of planned giving donors are travelers
- % of volunteers are travelers
- % of event attendees are travelers

Compare travel program to other cultivation and stewardship activities

- Calculate # of touchpoints/visits and length of time for increased giving of travelers as compared to non-travelers(need gift officer help for tracking)

Example: "It takes 3-4 years to cultivate a donor for a \$1,000,000 gift, but if they attend a trip, it takes 18 months."

Metrics between travel group and non-travel group (alumni, donors, or both)

- Donor retention vs donor retention of travelers
- Retention rate of new donors vs retention rate of new donors who traveled
- Acquisition cost of new donor, vs acquisition cost through travel program
- % of increased of travelers vs non-travelers
- Aggregate profile of travelers compared to aggregate profile of non-travelers
 - Average gift
 - Lifetime giving / Cumulative giving
 - Engagement
- % increase in lifetime giving of travelers vs non-travelers
- % increase in annual gift of travelers vs non-travelers
- % increase in likelihood of planned gift of travelers vs non-travelers
- % increase in likelihood of making a \$100,000 gift of travelers vs non-travelers
- % increase in likelihood of joining council/board/advisory of travelers vs non-travelers

Metrics before and after trip (6 months, 1 year, 2 years, 5 years)

- % of travelers who make a first-time gift
- Changes in annual giving before and after travel
- Changes in status (joining council/board/advisory) before and after travel
- New referrals/connections to other donors before and after travel
- Changes in event participation before and after travel

Trip Experience

- Rating of the trip/trip host/faculty
- % of repeat travelers
- Net Promoter Score (NPS)