



# THE BENCHMARKING PROJECT 2022 BROCHURE

Your data tells the story



**THE  
BENCHMARKING  
PROJECT**



**In the spirit of reconciliation we acknowledge the Traditional Custodians of country throughout Australia and their connections to land, sea and community.**

**We pay our respect to their elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.**



# Who we are

The Benchmarking Project is a collaborator, a facilitator, a storyteller, a visionary, a partner in fundraising.

The project's team of fundraising experts exist to serve fundraisers like you, by giving you the insights you need to have an even bigger impact.

We are creating a place where the Australian and Aotearoa/New Zealand fundraising community can draw on best-practice benchmarking, collective wisdom and external perspectives to make more effective decisions, by understanding their place in the community.

**We are passionate about charities, confident in our process, and committed to helping you change the world.**



**Our team:** (Row one) Dr Peter Coleman, Paul Tavatgis,  
(Row two) Adam Watson, FiM cPhee,



**Collaboration** is one of our sector's most unique strengths.

The Benchmarking Project harnesses this strength, by bringing together a wealth of information and data, and a diverse range of voices, to generate powerful outcomes.



# Better decisions are based on trustworthy information

Our project is built on 4 foundational pillars of Data, Community, Insights and Decisions.

DATA	COMMUNITY	INSIGHTS	DECISIONS
<p>You've told us you need one valid, shared set of terminology, standards and methodologies for fundraising benchmarks, KPIs and metrics.</p> <p>We've responded with a comprehensive analysis of all key areas of fundraising, with a deep dive into regular giving.</p>	<p>You've asked for better opportunities to explore and discuss the data and insights behind fundraising programs – not just charts and numbers, but the stories and human truths they tell.</p> <p>We understand that this is important to you, so we've created an ongoing program of forums with industry experts where you can share and learn as a community.</p>	<p>The best fundraising relies on the best stories.</p> <p>Right now, you may be feeling challenged by the lack of access to standardised, data-driven insight about the performance of fundraising programs.</p> <p>We plan to bring valuable insights by interrogating a huge data set and revealing the stories it contains.</p> <p>Together, we can better understand, inform and inspire our charity leaders, our fundraising strategies and our teams.</p>	<p>We provide information for:</p> <p><b>Boards</b> – to support governance of fundraising</p> <p><b>Fundraising leaders</b> – to support more effective decision making, forecasting and management</p> <p><b>Fundraising teams</b> – to support program improvement and management</p>



# Why the Benchmarking Project?

- We are a sector-led and collaborative program, designed by fundraisers, to serve the fundraising community
- You will receive all the crucial individual giving fundraising metrics with a unique deep dive into Regular Giving
- Each year, the needs of our members will drive our analysis and focus. You will have access to benchmarking of the net results of fundraising – integrating income, costs and retention
- You will see, for the first time, insights into regular giving supplier metrics to support good outsourcing decisions



# Scope and focus

**Analysis will provide you with a comprehensive set of measures in all critical areas of individual giving.**

- All individual giving categories and channels including Major Gift, Gifts in Wills, Digital and Events
- A deep dive into Regular Giving, including costs and supplier metrics  
Calendar year analytics based on 10 years of data
- Development of a sector-wide dictionary for measuring and discussing retention
- Combined insights from More Profitability Benchmarking



# More Profitability Benchmarking

## DELIVERABLES

Measure and compare cost income ratio by year and program

Set realistic expectations and budgets using industry return on investment rates

Evaluate and compare income and profit per FTE by program

Determine where to invest for best returns looking at industry growth and return

Increase confidence and understanding of fundraising returns at leadership level

Summary dashboard and deep dive reporting by program

## DATA REQUIREMENTS



## SEGMENTS COVERED

- EVENTS
- DIRECT MARKETING
- CORPORATE
- MAJOR DONORS
- TRUSTS
- BEQUESTS
- SALES
- LOTTERIES





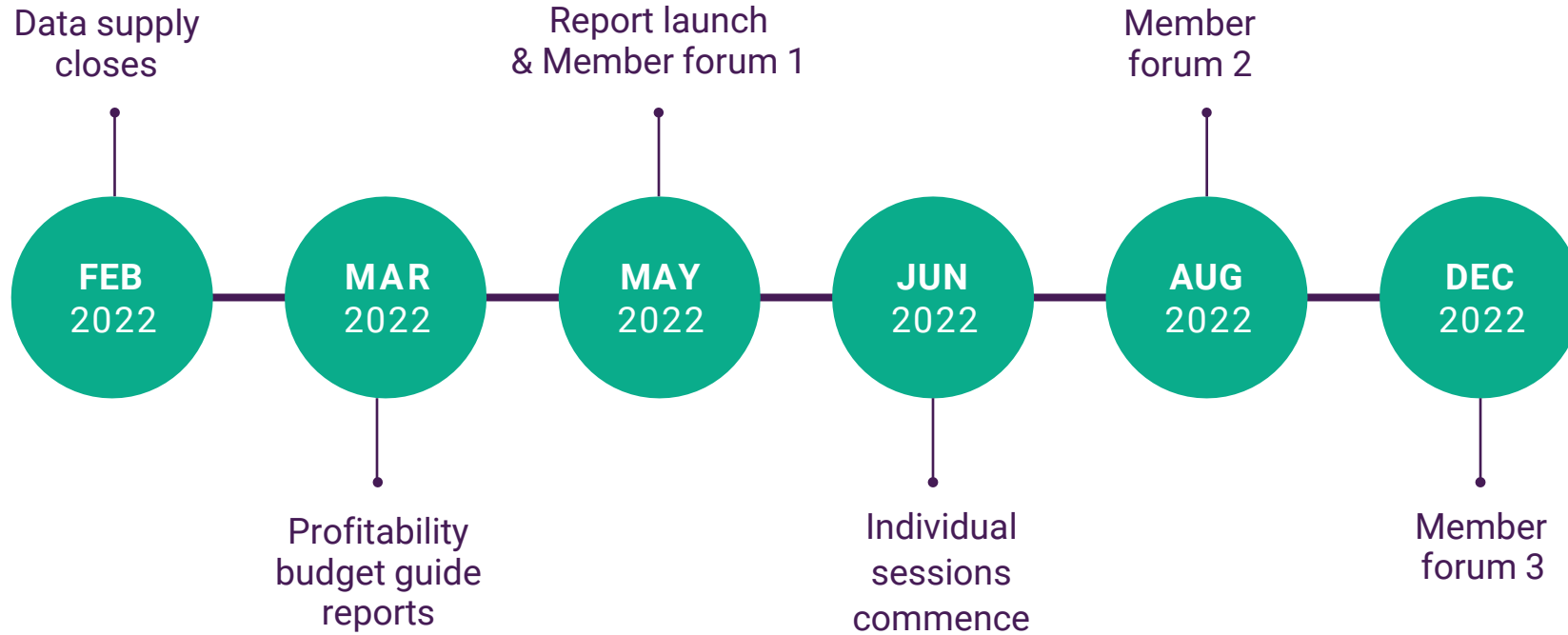
# Membership options



**BEST  
VALUE**

<b>SMALL CHARITY</b>	<b>INDIVIDUAL GIVING BENCHMARKING MEMBERSHIP</b>	<b>INDIVIDUAL GIVING BENCHMARKING MEMBERSHIP + MORE PROFITABILITY</b>	<b>INDIVIDUAL GIVING BENCHMARKING MEMBERSHIP + MORE PROFITABILITY</b>
Non-data supplying charities with fewer than 5000 active RGs	Data-supplying charities with more than 5000 active RGs	Combined insights from More Profitability Benchmarking	Data-supplying charities with more than 5000 active RGs
<b>\$1,000</b>	<b>\$11,000</b>	<b>\$13,000</b>	<b>\$21,000</b>
Valid for 1 year	Valid for 1 year	Valid for 1 year	Valid for 2 years
Essentials Benchmarking Report	Essentials Benchmarking Report	Essentials Benchmarking Report	Essentials Benchmarking Report
Access to all updates made to the Essentials Report during the year	Access to all updates made to the Essentials Report during the year	Access to all updates made to the Essentials Report during the year	Access to all updates made to the Essentials Report during the year
1 ticket to each Insights Forum	3 tickets to each Insights Forum	3 tickets to each Insights Forum	3 tickets to each Insights Forum
	Individual organisation reporting (accessed via PowerBi)	Individual organisation reporting (accessed via PowerBi)	Individual organisation reporting (accessed via PowerBi)
	Access to additional insight research	Access to additional insight research	Access to additional insight research
		Insights from More Profitability Benchmarking (2 Years)	Insights from More Profitability Benchmarking (2 Years)

# 2022 timeline



# Find out more

Want more information on how you can take part in The Benchmarking Projects' collaborative fundraising benchmarking program in 2022?

Register your interest at:  
[benchmarkingproject.org/register](https://benchmarkingproject.org/register)

To take your next step, contact Adam directly at:

**P** +61 414 152 326

**E** [adam.watson@benchmarkingproject.org](mailto:adam.watson@benchmarkingproject.org)

