



**THE
BENCHMARKING
PROJECT**

BENCHMARKING BROCHURE 2023

Your data tells the story





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,

Our generous partners

- We simply couldn't achieve what we need to without our Primary Partners and Collaborators.
- Marlin Communications and More Strategic's investment in the Benchmarking Project demonstrates their commitment to an informed and best-practice fundraising sector.
- We thank them for their ongoing support.

marlin



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.

Last year our community of 58 charities, 18 collaborators and 16 advisors shared their time, experiences and data through our Essentials Report and three online Insights Forums to inform better fundraising.





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 bring valuable insights by interrogating a huge data set and revealing the stories it contains.</p>	<p>We provide information for:</p> <p>Boards – to support governance of fundraising</p> <p>Fundraising leaders – to support more effective decision making, forecasting and management</p> <p>Fundraising teams – 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
- 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



What our members say

“The PowerBI setup is really fantastic. Andy has done a spectacular job which will surprise literally nobody.

I've been in a couple of times and have pulled through some of the benchmarks to show where we're at in our monthly reports. This is a really great tool.”



Ally Murray
Director – Membership & Fundraising
The Wilderness Society



Scope and focus

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

- All categories and channels including Regular Giving, Mid and Major Gifts, Gifts in Wills, Digital, Events, Peer to Peer and Community Fundraising
- Calendar year analytics based on 10+ years of data
- Development of a sector-wide dictionary for measuring and discussing retention

Membership options – Non-data supplying organisations



“As a fundraiser, I want a deep and accurate understanding of donor behaviour, fundraising program performance, and of fundraising marketplace trends.”

INDIVIDUAL GIVING ACCELERATOR

Non-data supplying charities with fewer than 50,000 transactions

\$2,000

Valid for 1 year

Essentials Benchmarking Report

Access to all updates made to the Essentials Report during the year

Minimum of 4 free tickets to the Launch Forum

Minimum of 4 free tickets to 2 Special Interest Sessions

Accelerator members only Forum for charities with small individual giving programs

COLLABORATOR

Non-data supplying suppliers, consultants and agencies

\$5,000

Valid for 1 year

Essentials Benchmarking Report

Access to all updates made to the Essentials Report during the year

Minimum of 4 free tickets to the Launch Forum

Minimum of 4 free tickets to two Special Interest Sessions

Present at member sessions

Produce articles for members



Membership options – Data supplying organisations

INDIVIDUAL GIVING BENCHMARKING 2023

Data supplying charities with more than 50,000 transactions

\$11,500

Valid for 1 year

Essentials Benchmarking Report

Personalised PowerBI Analytics

PowerBI training workshop

Minimum of 4 free tickets to the Launch Forum

Minimum of 4 free tickets to 2 Special Interest Sessions

Commission additional paid analytics

Purchase workshop at \$3,500

INDIVIDUAL GIVING BENCHMARKING 2023 + WORKSHOP

Data-supplying charities with more than 50,000 transactions

\$14,500

Valid for 1 year

Essentials Benchmarking Report

Personalised PowerBI Analytics

PowerBI training workshop

Minimum of 4 free tickets to the Launch Forum

Minimum of 4 free tickets to 2 Special Interest Sessions

Commission additional paid analytics

Analytics workshop included

INDIVIDUAL GIVING BENCHMARKING 2023/24

Data-supplying charities with more than 50,000 transactions

\$20,000

Valid for 2 years

Essentials Benchmarking Report

Personalised PowerBI Analytics

PowerBI training workshop

Minimum of 4 free tickets to the Launch Forum

Minimum of 4 free tickets to 2 Special Interest Sessions

Commission additional paid analytics

Purchase workshop at additional cost each year

INDIVIDUAL GIVING BENCHMARKING 2023/24 + WORKSHOPS

Data-supplying charities with more than 50,000 transactions

\$26,000

Valid for 2 years

Essentials Benchmarking Report

Personalised PowerBI Analytics

PowerBI training workshop

Minimum of 4 free tickets to the Launch Forum

Minimum of 4 free tickets to 2 Special Interest Sessions

Commission additional paid analytics

Analytics workshop included

**BEST
VALUE**

What our members say

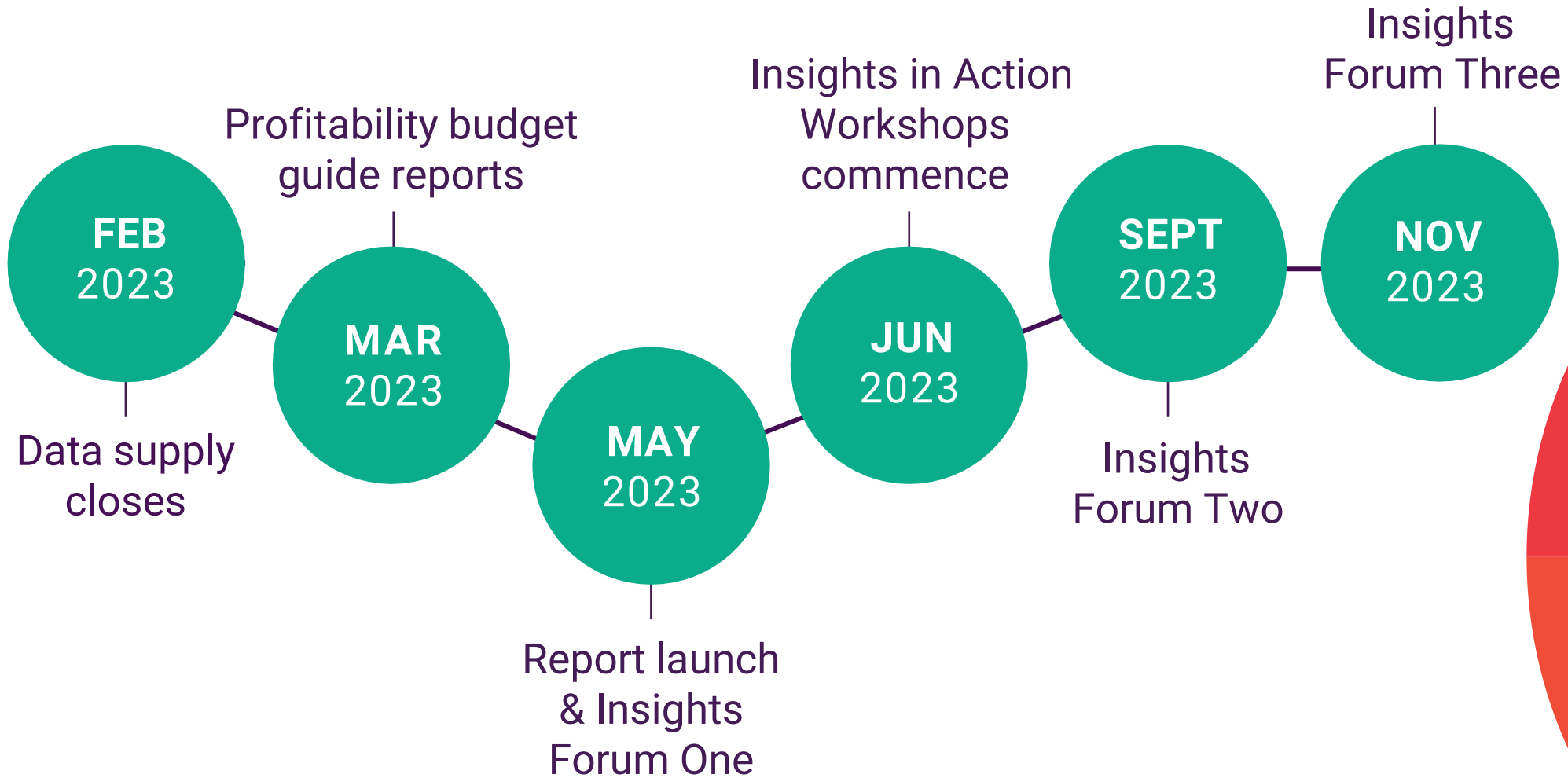
“You gave a terrific overview of where our fundraising programs are currently at and where there is opportunity for exploration, testing and growth. The Power BI tool will also be a great resource for us all to delve deeper into our key metrics and with all of the new initiatives we are looking at putting in place.

It will allow us to set a baseline and growth targets which we will work towards improving, especially in the MV and HV/Major donor space. It is really great to have the other 37 charities data in there too so that we can compare and contrast our progress with over the coming months.”



Elizabeth Dorizac
Senior Manager Individual Giving
MS Plus

2023 timeline



Find out more

If you would like more information on how you can take part in our collaborative fundraising benchmarking program in 2023 you can register your interest at:

W benchmarkingproject.org/register

or contact Adam directly at:

P +61 414 152 326

E adam.watson@benchmarkingproject.org

