



**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><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
- 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

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

**\$2,000**

Valid for 1 year

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Essentials Benchmarking Report

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

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Minimum of 4 free tickets to the Launch Forum

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Minimum of 4 free tickets to 2 Special Interest Sessions

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Accelerator members only Forum for charities with small individual giving programs

## COLLABORATOR

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Non-data supplying suppliers, consultants and agencies

**\$5,000**

Valid for 1 year

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Essentials Benchmarking Report

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

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Minimum of 4 free tickets to the Launch Forum

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Minimum of 4 free tickets to two Special Interest Sessions

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Present at member sessions

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Produce articles for members



# Membership options – Data supplying organisations

<b>INDIVIDUAL GIVING BENCHMARKING 2023</b>	<b>INDIVIDUAL GIVING BENCHMARKING 2023 + WORKSHOP</b>	<b>INDIVIDUAL GIVING BENCHMARKING 2023/24</b>	<b>INDIVIDUAL GIVING BENCHMARKING 2023/24 + WORKSHOPS</b>
<p>Data supplying charities with more than 50,000 transactions</p> <p><b>\$11,500</b></p> <p>Valid for 1 year</p>	<p>Data-supplying charities with more than 50,000 transactions</p> <p><b>\$14,500</b></p> <p>Valid for 1 year</p>	<p>Data-supplying charities with more than 50,000 transactions</p> <p><b>\$20,000</b></p> <p>Valid for 2 years</p>	<p>Data-supplying charities with more than 50,000 transactions</p> <p><b>\$26,000</b></p> <p>Valid for 2 years</p>
<p>Essentials Benchmarking Report</p>	<p>Essentials Benchmarking Report</p>	<p>Essentials Benchmarking Report</p>	<p>Essentials Benchmarking Report</p>
<p>Personalised PowerBI Analytics</p>	<p>Personalised PowerBI Analytics</p>	<p>Personalised PowerBI Analytics</p>	<p>Personalised PowerBI Analytics</p>
<p>PowerBI training workshop</p>	<p>PowerBI training workshop</p>	<p>PowerBI training workshop</p>	<p>PowerBI training workshop</p>
<p>Minimum of 4 free tickets to the Launch Forum</p>	<p>Minimum of 4 free tickets to the Launch Forum</p>	<p>Minimum of 4 free tickets to the Launch Forum</p>	<p>Minimum of 4 free tickets to the Launch Forum</p>
<p>Minimum of 4 free tickets to 2 Special Interest Sessions</p>	<p>Minimum of 4 free tickets to 2 Special Interest Sessions</p>	<p>Minimum of 4 free tickets to 2 Special Interest Sessions</p>	<p>Minimum of 4 free tickets to 2 Special Interest Sessions</p>
<p>Commission additional paid analytics</p>	<p>Commission additional paid analytics</p>	<p>Commission additional paid analytics</p>	<p>Commission additional paid analytics</p>
<p>Purchase workshop at \$3,500</p>	<p><b>Analytics workshop included</b></p>	<p>Purchase workshop at additional cost each year</p>	<p><b>Analytics workshop included</b></p>

**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](https://benchmarkingproject.org/register)

or contact Adam directly at:

**P** +61 414 152 326

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

