



BENCHMARKING BROCHURE 2024

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

Paul Tavatgis, Dr Peter Coleman, Adam Watson, Fi McPhee

**We simply couldn't
achieve what we need
to without our Partners.**

We thank our Primary Partners Marlin Communications and More Strategic, and our Data Partner, Slingshot Data for their commitment to our sector.

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



88 charities

20 Collaborators & Partners, and

20 advisors

shared their time, experiences and data through our two Essentials Reports and five online 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

You've told us you need one valid, shared set of terminology, standards and methodologies for fundraising benchmarks, KPIs and metrics.

We've responded with a comprehensive analysis of all key areas of fundraising, with a deep dive into regular giving.

COMMUNITY

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.

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.

INSIGHTS

The best fundraising relies on the best stories.

Right now, you may be feeling challenged by the lack of access to standardised, data-driven insight about the performance of fundraising programs.

We bring valuable insights by interrogating a huge data set and revealing the stories it contains.

DECISIONS

We provide information for:

Boards —
to support governance of fundraising

Fundraising leaders —
to support more effective decision making, forecasting and management

Fundraising teams —
to support program improvement and management

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

WHAT OUR MEMBERS SAY

“The Insights-in-Action workshop provided a perfect platform for translating the valuable benchmarking insights into practical actions. The workshop was well organised, engaging and the team’s expertise was evident throughout. Our group felt better equipped to make positive changes to help improve our fundraising results.”



Elizabeth Marson

*Head of Data and Insights
Australia for UNHCR*



SCOPE AND FOCUS

Analysis will provide you with a comprehensive set of measures in all critical areas of Individual Giving, Trusts and Foundations and Corporate Giving.



- All categories and channels** including Regular Giving, Standard, 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

<div> <div>INDIVIDUAL GIVING ACCELERATOR 2024</div> <div>Non-data supplying charities with fewer than 50,000 annual transactions</div> <div>\$2,000</div> </div>	<div> <div>INDIVIDUAL GIVING BENCHMARKING 2024</div> <div>Data-supplying charities with more than 50,000 annual transactions</div> <div>\$12,000</div> </div>	<div> <div>BEST VALUE</div> <div>INDIVIDUAL GIVING BENCHMARKING 2024/25</div> <div>Data-supplying charities with more than 50,000 annual transactions</div> <div>\$22,000</div> </div>	<div> <div>COLLABORATOR 2024</div> <div>Non-data supplying consultants, suppliers and agencies</div> <div>\$5,000</div> </div>
Valid for 1 year	Valid for 1 year	Valid for 2 years	Valid for 1 year
Essentials Reports — Australian and Aotearoa New Zealand versions	Essentials Reports — Australian and Aotearoa New Zealand versions	Essentials Reports — Australian and Aotearoa New Zealand versions	Essentials Reports — Australian and Aotearoa New Zealand versions
Minimum of 4 tickets to the Launch Forums	Individualised PowerBI reports — RG and full IG	Individualised PowerBI reports — RG and full IG	Opportunity to present at relevant Forums
Minimum of 4 tickets to specialist Forums	Minimum of 4 tickets to the Launch Forums	Minimum of 4 tickets to the Launch Forums	Minimum of 4 tickets to all Forums — Australia and Aotearoa New Zealand
Accelerator members only Forum for charities with small individual giving programs	Minimum of 4 tickets to specialist Forums	Minimum of 4 tickets to specialist Forums	Opportunity to produce articles to be shared with members
More Profitability Benchmarking Forum	Commission additional paid analytics	Commission additional paid analytics	Company logo and description featured on website

VALUE ADDS

To get the most value for your organisation and your team you can pick and mix from the value adds

	ACCELERATOR	BENCHMARKING 2024	BENCHMARKING 2024/25	COLLABORATOR	FEE AUD
More Profitability Benchmarking — Simple Edition. 1 Year	✓	✓	✓		\$1,750
More Profitability Benchmarking — Smart Edition. 1 Year	✓	✓	✓		\$2,750
More Profitability Benchmarking — Sophisticated Edition. 1 Year	✓	✓	✓		\$3,750
The Benchmarking Project Executive Summary. 1 Year		✓	✓		\$2,000
The Benchmarking Project Executive Summary. 2 Years			✓		\$4,000
2nd data delivery date for half-year update <i>(only 10 available)</i> . 1 Year		✓	✓		\$3,000
2.5hr Virtual Insights in Action Workshop with Fi McPhee. 1 Year		✓	✓		\$3,000
2.5hr Virtual Insights in Action Workshop with Fi McPhee. 2 Years			✓		\$6,000
2.5hr In-person Insights in Action Workshop with Fi McPhee <i>(only 6 available)</i> . 1 Year		✓	✓		\$5,500
2.5hr In-person Insights in Action Workshop with Fi McPhee <i>(only 6 available)</i> . 2 Years			✓		\$11,000
2nd data delivery date for half-year update. 1 Year		✓	✓		\$3,000
2nd data delivery date for half-year update. 2 Years			✓		\$6,000
Dr Cassandra Chapman’s research — Understanding consumer’s charity preference		✓	✓		FREE
2hr Andy Tidy / Slingshot data workshop				✓	\$3,500

MORE Profitability Benchmarking

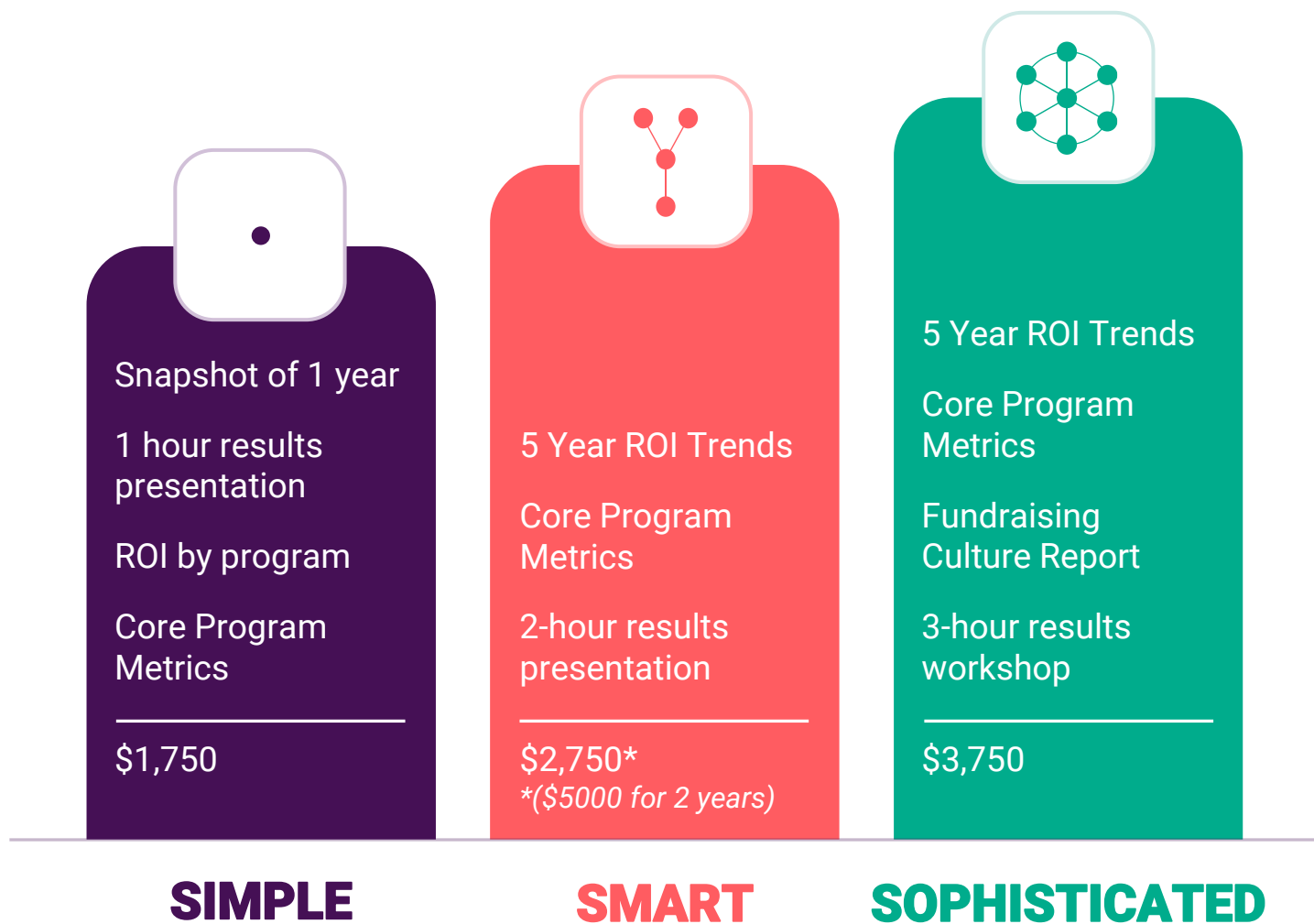
What it is

Australia's only fundraising benchmarking that compares return on investment across eight types of fundraising

Use it to

- Set realistic return on investment [ROI] expectations and budgets
- Ensure your ROI is keeping up with the market
- Determine where to invest for best returns
- Refine your fundraising mix
- Review the number of relationships managed by each staff member
- Make a compelling case for investment in staff
- Understand how the change in your supporter database compares to others
- Increase confidence in and understanding of fundraising at a Board and leadership level





MORE Profitability Benchmarking

What you get

- Deep analysis of your performance and future opportunities
- Presentation of findings by renowned fundraising experts
- Comprehensive reports with summary dashboards

WHAT OUR MEMBERS SAY

"... we had our Insights Action workshop with Fi McPhee which coincided with our annual strategy week. The session really helped reinvigorate the team by celebrating the success of the last few years. It helped us understand what we have been doing right and what we should continue, as well as highlighting areas of opportunity. All these insights were brought into our strategy discussions for the remainder of the year. It was important for our team to get the "outsider" perspective that Fi brought.

"Fi has a fantastic sense of humour and isn't afraid to say it like it is. We really appreciated her time and insights."

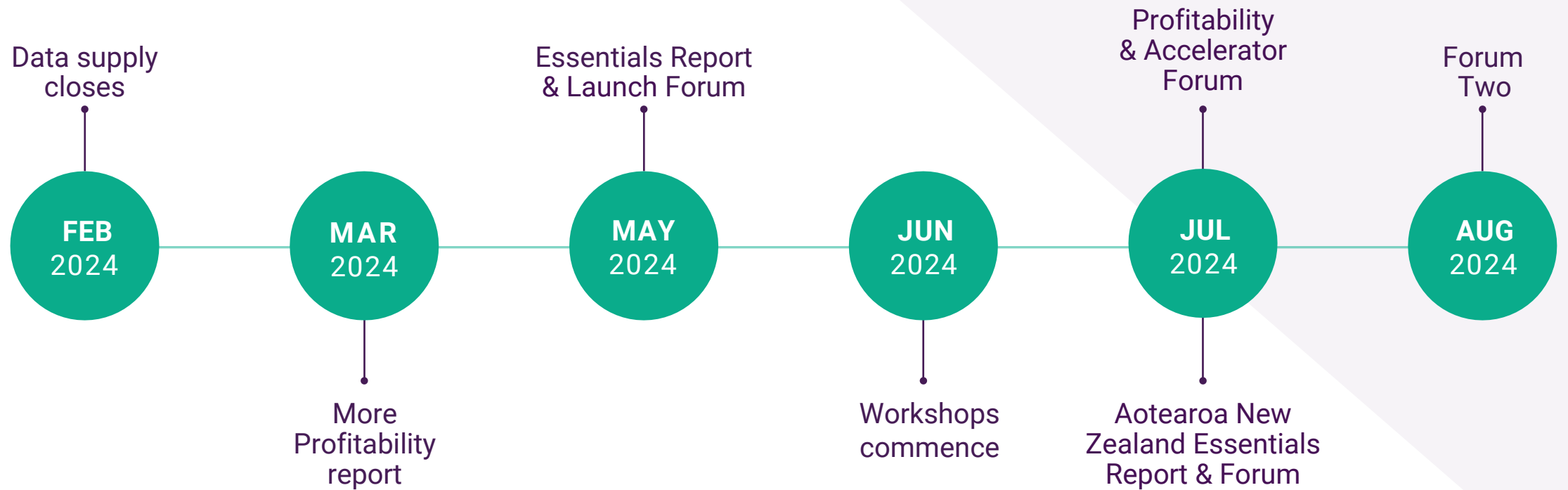


Erin Hamalainen

*Head of Data Analytics and Insights
The Fred Hollows Foundation*



2024 TIMELINE



**Dates may vary*

FIND OUT MORE

To find out more information on how your organisation can take part in The Benchmarking Projects' collaborative fundraising benchmarking program in 2024 or to register to take part, **please contact us by registering at www.benchmarkingproject.org**

You can also contact Adam

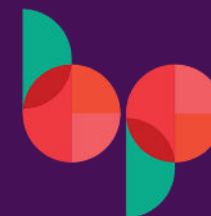
by phone on **+61 414 152 326**

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THE
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PROJECT