



More Profitability Benchmarking

2019

In partnership with



The Professional Body for Australian Fundraising

What and Why

Using timely, accurate and compatible financial information from your management accounts we will show you how you compare to sector measures, to other organisations and to recent trends.

Vitality, the profitability benchmarking examines your income, direct costs and salary costs to show your returns compared to others.

Benefits and application

It is vital that we report our relative performance if we are to know how well we perform. Traditionally not-for-profits have only reported against budget and prior years but this ignores the context of what is happening in the market. We know fundraising is getting tougher and our data illustrates that it is also getting more expensive.

From interviews with past users of this service, others have found it invaluable to:

- ✓ Measure Relative performance
- ✓ Set realistic expectations and budgets
- ✓ Evaluate your fundraising mix
- ✓ Determine where to invest for best returns
- ✓ Create a profit accountable culture
- ✓ Increase confidence in and understanding of fundraising

Our Benchmarking data can also now be integrated to our 5 year Forecasting model to help you set more informed, sustainable and realistic ambitions for fundraising growth.

Participation Options

Topline: Free for FIA Organisational members this new version offers a comparison of your overall fundraising income, expenditure, salaries and full time staff equivalents against our 5 year data set and other participating charities for this year.

Insights: This comprehensive, robust analysis looks at 9 fundraising programs and compares your performance in each area for the past 5 years for returns, mix and growth. It includes our unique Fundraising Success Survey and a 2 hour presentation of findings.

Report: This option provides the full set of 357 charts provided in the Insights package but without the interpretation, presentation or success survey.

	Topline	Best Value	Report
		Insights	
Overall Fundraising	✓	✓	✓
Compare to macro analysis	✓	✓	✓
Individual Program reports		✓	✓
5 year Trends		✓	✓
Fundraising Success Survey		✓	
2 hour presentation		✓	
Investment	\$500	\$4,000	\$2,000
FIA Member Investment	Free	\$3,200	\$2,000



Insights Package includes comprehensive 25 page reports on each of the following areas of fundraising:

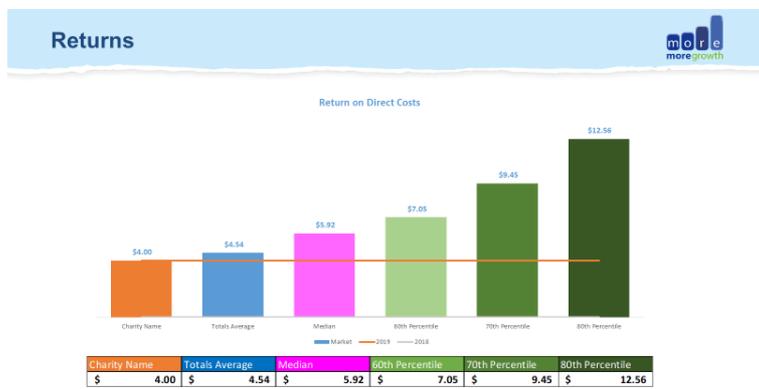


Reporting

A detailed listing of the calculations and charts follows and includes:

Macro Comparisons (Topline, Insights and Report Packages)

Our macro analysis covers nearly \$4.5b of income across 66 charities over the past 5 years to give a robust picture of return rates.

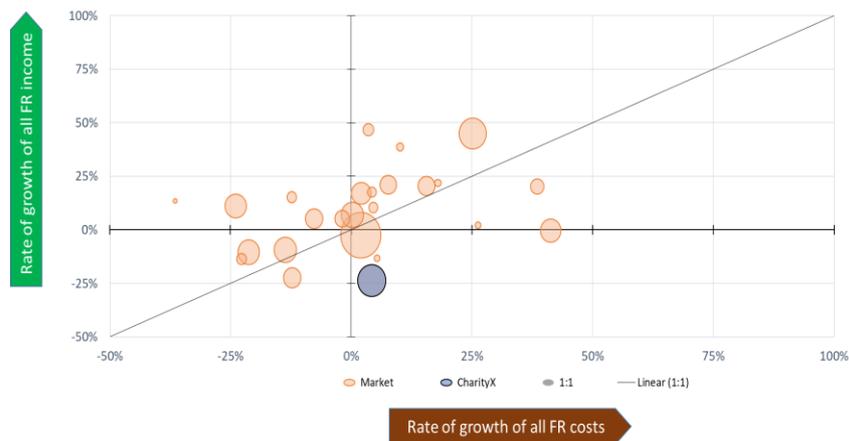


Figures are illustrative only

These will be applied to return on direct costs, return on salaries, return on full costs, return per FTE for overall and non bequest fundraising. Results are compared to the average, median and percentiles up to the 80th.

Trend Reports (Insights and Report)

Our accelerator charts show the rate of change in income compared to the rate of change in expenditure by size of organisation helping you to quickly see if your program is over or under performing compared to others.



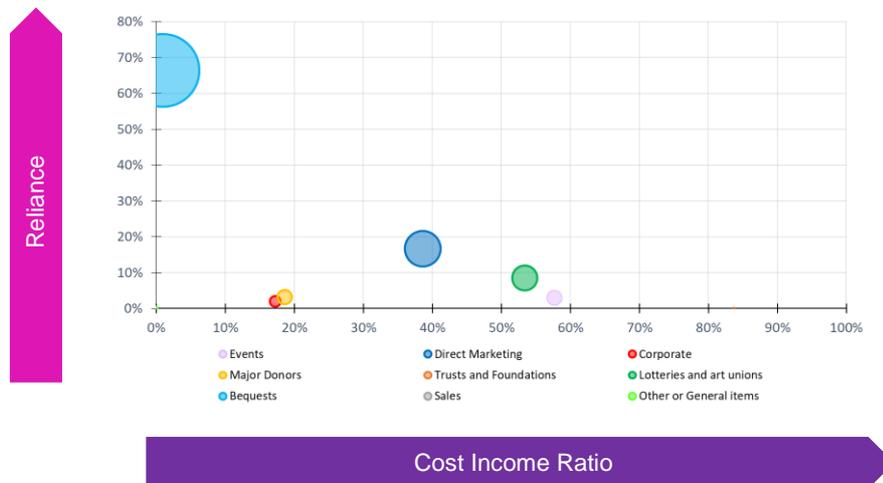
Dashboard Reports (Insights and Report Packages)

These summaries are valuable for showing results at a leadership level covering annual and 5 year growth in gross and net terms, changes in return, market share and income per head of population.



Mix Reports (Insights and Data Packages)

In the insights package we provide a detailed breakdown of the reliance for each type of fundraising and compare this to the cost income ratio by size of charity allowing you see at a glance where to focus your efforts in the future.



Data Requirements

Real costs: the report is based on detailed management accounts submitted by each participating charity. Detailed instructions ensure we are comparing apples with apples.

Granularity: income and expenditure is captured in 9 types of fundraising and 20 categories giving you the most detailed report on cost ratio's available.

Anonymous: to encourage the most open reporting and participation, results are all de-identified. No one but you will know your results.

For the [Topline Report](#) we need just 8 numbers for your most recent complete year.

Topline Data Collection Template



Charity Name	2019
Total Fundraising Income (including Bequests)	\$ -
Bequest Income	\$ -
Fundraising Direct Costs (including bequest costs)	\$ -
Bequest direct costs	\$ -
Fundraising Salary costs (including bequests)	\$ -
Bequest salary costs	\$ -
Number of Full Time Equivalent (FTE) Fundraisers	0.00
Bequest FTE	0.00

You can supply these using:

- ✓ More Profitability Topline Data Collection Template 2019
- ✓ Our web page morestrategic.com.au/benchmarking
- ✓ This link [More Profitability Topline Data Collection](#)

For the [Insights and Data Reports](#) we need a few more numbers..... these will be collected using the More Profitability Full Data Collection Template 2019

The template we supply automatically creates “sanity checking graphs” and alerts if any numbers appear inconsistent or are outliers.

Instructions are issued to all charities to ensure reasonable levels of comparability.

In Good Company

More than 50 large and small not for profits have benefitted from our benchmarking over the past 5 years. The more organisations that take part, the more robust the data and the greater the opportunity for specific reporting.

Don't take our word for it, here's what Warrick Saunders, Director Fundraising at Medicines Sans Frontiere said of the study;

"We participated in More Strategic's Profitability Benchmarking for the first time in 2017 and have been impressed by the number of meaningful insights it has provided into the sector as a whole and MSF's program in particular. Through the workshop More Strategic provided robust commentary on industry trends and pulled out the priority areas of focus for MSF in order to maximize performance. I have no hesitation in recommending participation in this study to any charity wanting to better understand their program performance, to drive strategic investment and to grow their fundraising program"



Selection of organisations who have participated in prior years

In Partnership

We are proud to be partnering with the Fundraising Institute Australia to improve sector accountability and reporting through the More Profitability Benchmarking service.



Fundraising Success Survey

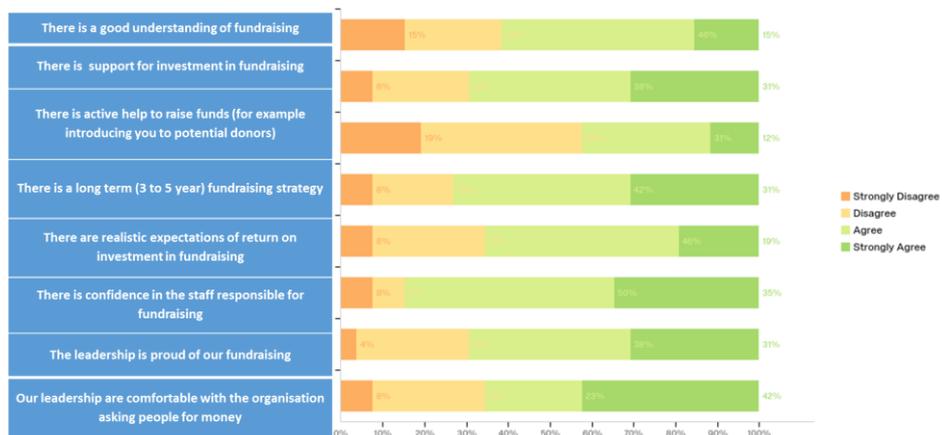
Sign up to More Profitability Insights Package and as a bonus you will get unique access to a study of the fundraising success factors across your organisation.

Fundraising success comes from a unique combination of an organisational culture that loves to fundraise, great insights about why people give and a well-resourced realistic strategy for growth.

More Strategic has developed and delivered a 15-question survey that assesses and benchmarks the key drivers of fundraising performance across 4 key areas;

Context	Activity	Success Drivers	Experience Management
1. Market 2. Employee Promoter Score	1. Portfolio 2. Performance 3. Potential	1. Leadership 2. Governance 3. Brand 4. Staffing 5. Strategy 6. Systems 7. Innovation	1. Performance 2. Measurement 3. Practice

We will invite organisational leaders and the fundraising team to complete the survey and in the workshop share the findings from across the organisation and in comparison to other not for profits.



Timings

Reporting for the Topline Report against Macro measures will be provided within 7 working days of data submission.

Reporting on comparative results for the Topline Report will be provided by the 1st February 2020 (or as soon as we receive 30 data sets)

Insights packages can receive reporting against the macro results and 5 years to June 2018 within 7 working days. Full trend analysis for the 5 years to June 2019 will be provided as soon as more than 15 charities have submitted data.

Our reporting is dynamic and constantly updated so any charity can join at any time at any level.

Get in Touch



Martin Paul

martin@morestrategic.com.au

0435 306 202



Ruth Wicks

ruth@morestrategic.com.au

0404 041 021

Resources: [morestrategic.com.au/benchmarking](https://www.morestrategic.com.au/benchmarking)

The Official Stuff

We find most terms and conditions to be confusing and jargon laden. We believe in clear simple communication.

Purpose

More Benchmarking aims to help not for profits make more informed decisions around managing investments in their fundraising portfolio and to provide a more accurate and granular measure of relative performance.

Confidentiality

We will not tell the other participating charities what your results are. In the reporting each charity is identified by a code. Only you will know which your code is. We will not tell anyone which data pertains to which charity.

You will receive a report that tells you what your “score” is compared to the average and each unnamed participating charity. You will not know which charities are which but you will know their size in broad fundraising income bands. Similarly they will not know which results are yours.

Marketing

Overall and illustrative results for selected tables may be used in reports, publications and in other marketing materials. These will not reveal which charities are which.

Data Provision and Storage

We understand that some of the data you will be supplying to us is sensitive. We therefore request that you encrypt the file and password protect it. We will provide you with access to More’s FTP site to upload data file to if you wish. As this aims to be an ongoing project your data will be stored in the database file for up to 5 years. It will comprise some of the comparative data sets for historical performance for this period. If however you want your historical performance deleted from the database file we will do so at your instruction.

Accuracy

Whilst every step is taken to ensure data from different organisations is comparable, accurate and a fair reflection of their true income and expenditure, we cannot promise that this is always the case. We cannot guarantee that the comparison charities are representative of all charities and we cannot guarantee that no one has chosen to represent themselves in a particular way. As such the results may be the best data available but should only be used as a guide to fundraising performance.

We will only invoice you after you send through the completed template – this protects you from having paying and then discovering you cannot supply the required financial information.

Publicly available data

In our reporting – for example an executive overview - we may publish data and graphs from public sources such as annual reports. These reports will only be based on information already in the public domain.

Legal Eagles

If you have a more comprehensive confidentiality agreement that you (or your legal advisors) would like us to sign, we are more than happy to do so.

Payment

Payment is 100% upon provision of data.

Payment is due within 25 days of receiving the invoice.

Our quoted price does not include GST, which will be added to invoices.

If you do not pay within the required period we may charge interest at the current bank rate.

Acceptance Form

Feel free to use the form below – or just drop us an email.

Organisation	
Contact name	
Contact Position	
Contact email	
Contact phone	
Signature	
Date	

I have read and accept the terms and conditions (Please tick)

Investment Option (please tick preferred option)

- \$4,000 Insights package
- \$2,000 Data Package
- \$500 Topline Package (non FIA members)
- Free Topline Package (FIA Organisational Members)

- I qualify for the \$3,200 rate discount (FIA Organisational Members, prior participants)

Please provide details _____

If there are specific organisations you think should take part please let us know and we will get in contact;

Org 1 _____ Contact email _____

Org 1 _____ Contact email _____