

Mission Metrics: Telling Your Story Through Data



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Agenda

The connection of data and stories

Metrics we all know and put us to sleep

Good metrics, transparency, and communication

Correlations of Data



Correlations of Data

[illegible]

Countries where you can drink tap water

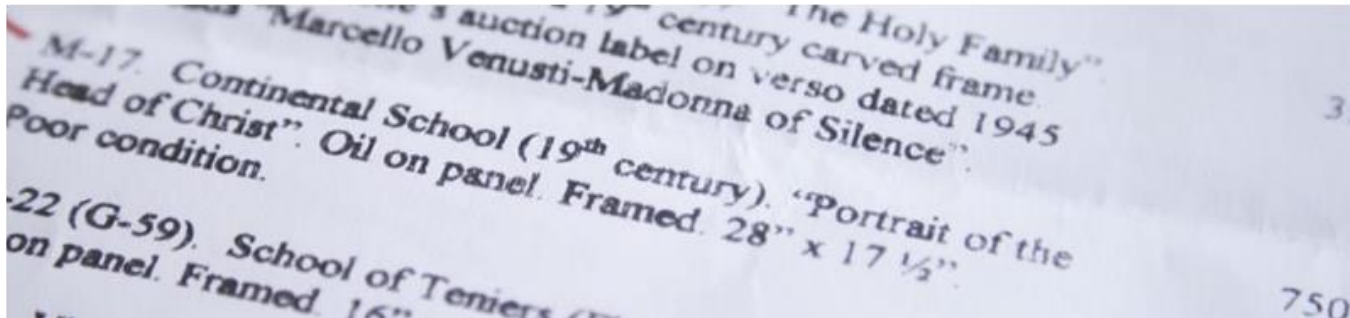


A world map with a white background. Countries are colored either dark blue or light gray. Dark blue countries include: Canada, the United States, Mexico, Greenland, Iceland, the United Kingdom, Ireland, Germany, France, Belgium, the Netherlands, Luxembourg, Switzerland, Austria, Italy, Spain, Portugal, Greece, Cyprus, Israel, Jordan, Saudi Arabia, Australia, and New Zealand. Light gray countries include: Russia, China, India, Pakistan, Bangladesh, Nepal, Bhutan, Tibet, Mongolia, North Korea, South Korea, Japan, Taiwan, Hong Kong, Macau, Southeast Asian nations (Thailand, Laos, Cambodia, Vietnam, Philippines, Indonesia, Malaysia, Brunei, Singapore, Timor-Leste), and South American nations (Brazil, Argentina, Chile, Peru, Colombia, Venezuela, Ecuador, Bolivia, Paraguay, Uruguay, and Guyana).

Pictures Tell Stories



Data Tells Info



Merging Data and Stories



Marcello Venusti-Madonna of Silence"
M-17. Continental School (19th century). "Portrait of the
Head of Christ". Oil on panel. Framed. 28" x 17 1/2"
Poor condition.
22 (G-59). School of T
on panel. Framed.

Nonprofit KPIs/Metrics that Put us to Sleep

The primary KPIs that bear weight:

- Program efficiency (0 – 10)
- Total Revenue (0 – 10)
- Size of endowment (0 – 10)
- Fundraising ratio (0 - 10)
- Operational ratio (0 – 10)

Nonprofit KPIs/Metrics in a Story

Program Metrics

- Program efficiency (0 – 10)

Nonprofit KPIs/Metrics ...snorefest/useless

Program Metrics

- ~~Program efficiency (0 – 10)~~

Nonprofit KPIs/Metrics Make a Story

Program Metrics

- ~~Program efficiency (0 – 10)~~
 - What do we do?
 - How well did we do it?
 - Why are we the best to do it?
 - How can you help do it?

Nonprofit Program KPIs/Metrics ...A Better Story

Program Metrics

- TNC example
 - Debit Land – Credit Cash problem
- Wounded Warriors Story
- ABC and The Resident

Nonprofit KPIs

Fundraising

- Gifts secured
- Donation growth
- Average gift size
- Average gift size growth
- Pledge fulfillment percentage
- Fundraising return on investment
- Cost per dollar raised
- Online gift percentage
- Percentage of contribution matches through corporate philanthropy



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Nonprofit KPIs (con't.)

Donor Retention

- Donor retention rate
- Donor growth
- Recurring gift percentage
- Donor churn
- Donor lifetime value
- Giving capacity
- Conversion rate



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Nonprofit KPIs (con't.)

Email Marketing

- Open rate
- Click through rate
- Email conversion rate
- Opt-out rate
- Outreach rate

Social Media

- Amplification rate
- Applause rate
- Social media conversion rate
- Landing page conversion rate
- Fundraiser participation rate



Strategic Balance

Length of Time

- Vision/Values 30 years
- Culture 10 years
- Strategy 5 years
- Financial model 5 years
- Budget 1 year
- Today's cash 1 day

Which nonprofit
employee thinks in
terms of 30 years
out?

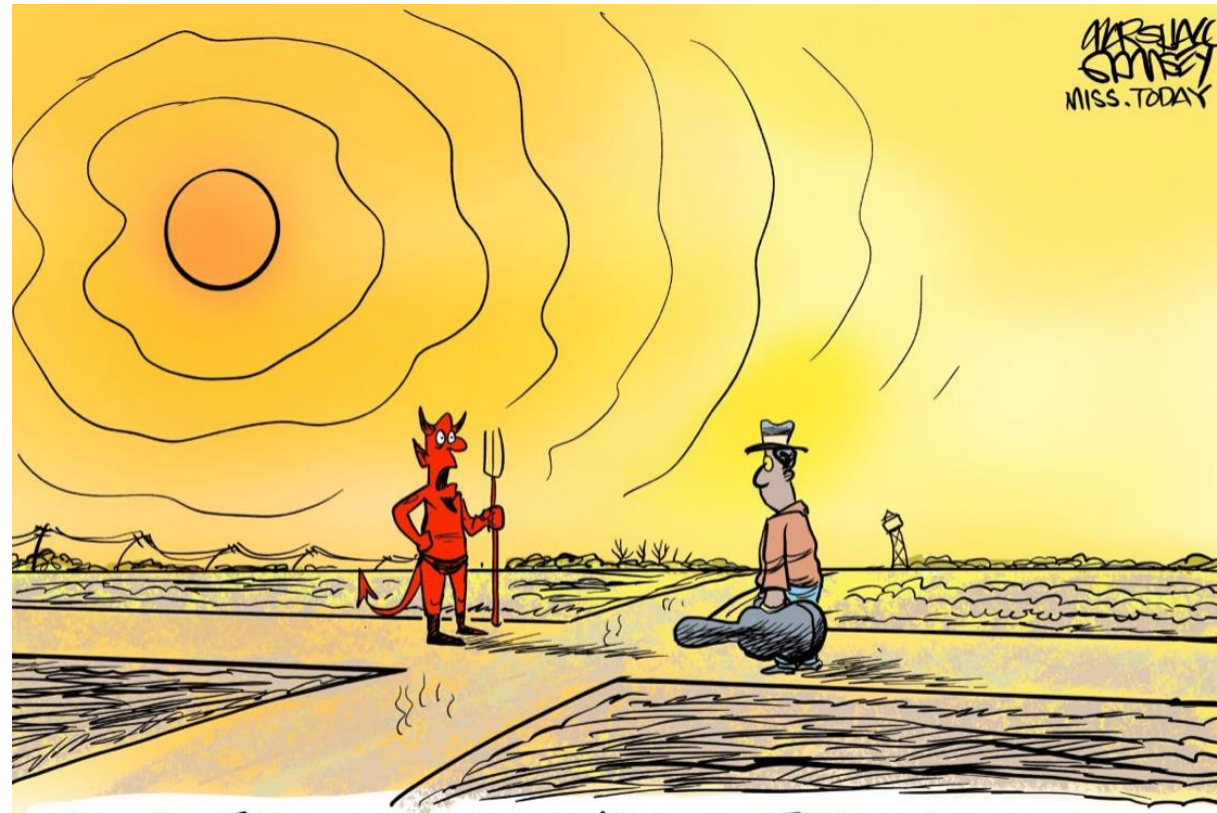


We Just Don't Think Ahead

Recalled pencils from an anti-drug campaign. 1998.



Thinking Short Term Bias



"NAW... I DON'T WANT YOUR SOUL. I JUST WANT TO
KNOW WHERE THE CLOSEST AIR CONDITIONING IS."

Marshall Ramsey

19

Ok...What Lasts 10 to 30 Years?

Financials

Technology and changes in technology

Risk and Value propositions

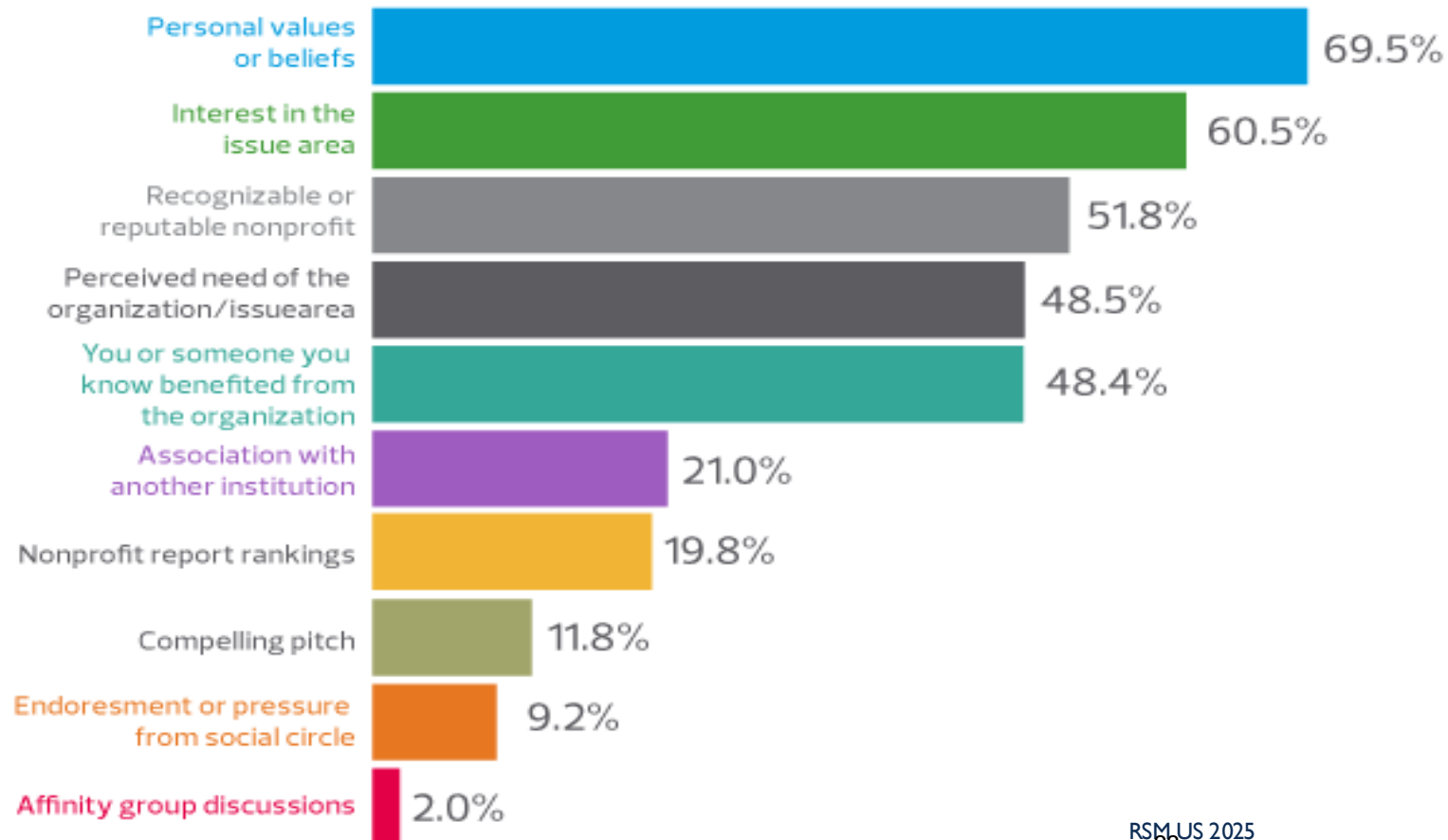
People

Who Are People and What Metrics are Important?

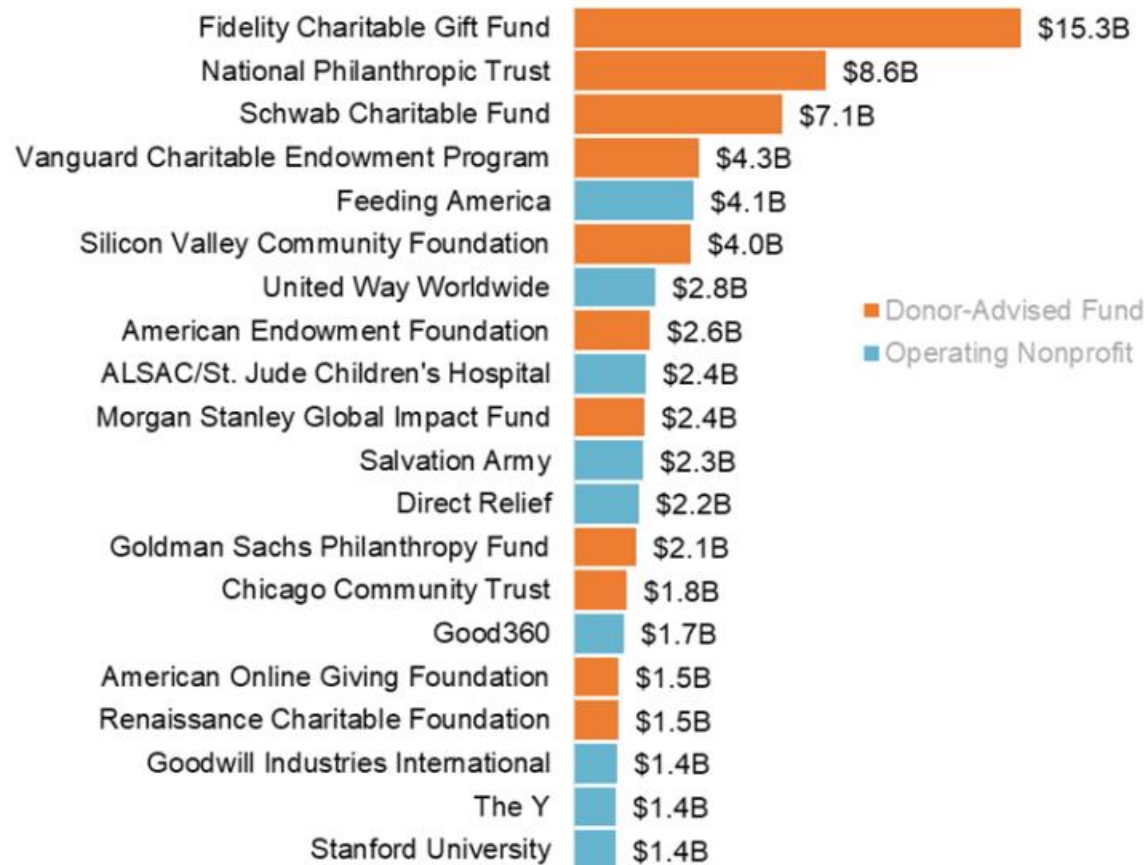
- Donors
- Employees
- Stakeholders
 - Does your org have core values?
 - Do you know your org's culture

Donors: Nonprofit Trends-Measurables?

Reasons affluent donors give to causes/organizations³



Donors Data: Top Charities by Funding



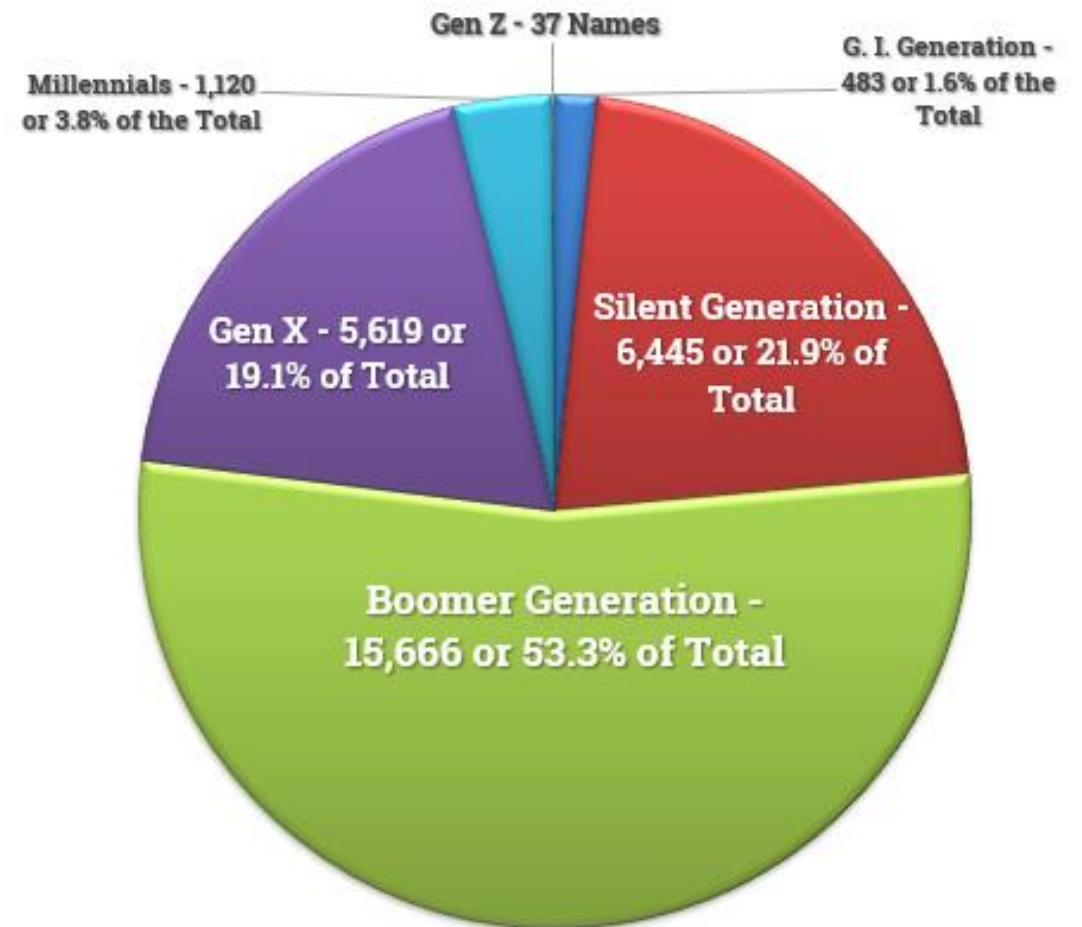
Sources: Estimated university contributions are from Bloomberg's list of top university fundraisers. Estimated non-DAF, non-university contributions are from Forbes' list of America's Top 100 Charities. DAF contributions are from IPS analysis of tax form 990s DAF sponsors, publicly available from the Internal Revenue Service.

Best Data Best Results: The Three C's

- **Complete data:** Include as much information about a donor as available
 - Giving history - date, amount & gift type,
 - Demographics - age, gender, marital status,
 - Financial - income, net worth, and value of donor's primary residence.
- **Correct data** guarantees that the information you're using is accurate
 - When was the last time it was updated for donors who move, marry, divorce or pass away, suffer financial losses or enjoy capital gains?
 - A data update refreshes existing information, such as fixing an incorrect mailing address.
- **Current data** ensures that your insights reflect donors' present circumstances, not outdated assumptions.
 - A data append adds entirely new information, such as:
 - Adding financial indicators
 - Identifying whether a donor has passed away.

Year of Birth 29,370 records enhanced 95.6% of file

Year of Birth	Count	% of matched	Age in 2025*	Year of Birth	Count	% of matched	Age in 2025*
1912	1	0.00%	113	1960	966	3.29%	65
1913	2	0.01%	112	1961	895	3.05%	64
1914	1	0.00%	111	1962	893	3.04%	63
1915	5	0.02%	110	1963	815	2.77%	62
1916	5	0.02%	109	1964	714	2.43%	61
1917	5	0.02%	108	1965	633	2.16%	60
1918	9	0.03%	107	1966	618	2.10%	59
1919	5	0.02%	106	1967	544	1.85%	58
1920	17	0.06%	105	1968	458	1.56%	57
1921	29	0.10%	104	1969	453	1.54%	56
1922	42	0.14%	103	1970	427	1.45%	55
1923	40	0.14%	102	1971	379	1.29%	54
1924	68	0.23%	101	1972	311	1.06%	53
1925	70	0.24%	100	1973	303	1.03%	52
1926	90	0.31%	99	1974	260	0.89%	51
1927	94	0.32%	98	1975	255	0.87%	50
1928	117	0.40%	97	1976	222	0.76%	49
1929	138	0.47%	96	1977	206	0.70%	48
1930	197	0.67%	95	1978	178	0.61%	47
1931	191	0.65%	94	1979	205	0.70%	46
1932	211	0.72%	93	1980	167	0.57%	45
1933	243	0.83%	92	1981	142	0.48%	44
1934	258	0.88%	91	1982	148	0.50%	43
1935	304	1.04%	90	1983	133	0.45%	42
1936	364	1.24%	89	1984	105	0.36%	41
1937	355	1.21%	88	1985	88	0.30%	40
1938	377	1.28%	87	1986	77	0.26%	39
1939	411	1.40%	86	1987	81	0.28%	38
1940	486	1.65%	85	1988	52	0.18%	37
1941	501	1.71%	84	1989	53	0.18%	36
1942	585	1.99%	83	1990	56	0.19%	35
1943	594	2.02%	82	1991	40	0.14%	34
1944	545	1.86%	81	1992	48	0.16%	33
1945	568	1.93%	80	1993	30	0.10%	32
1946	686	2.34%	79	1994	31	0.11%	31
1947	807	2.75%	78	1995	23	0.08%	30
1948	746	2.54%	77	1996	13	0.04%	29
1949	752	2.56%	76	1997	13	0.04%	28
1950	765	2.60%	75	1998	9	0.03%	27
1951	757	2.58%	74	1999	4	0.01%	26
1952	798	2.72%	73	2000	1	0.00%	25
1953	808	2.75%	72	2001	4	0.01%	24
1954	865	2.95%	71	2002	3	0.01%	23
1955	823	2.80%	70	2003	1	0.00%	22
1956	842	2.87%	69	2004	1	0.00%	21
1957	921	3.14%	68	2006	1	0.00%	19
1958	875	2.98%	67				
1959	938	3.19%	66				

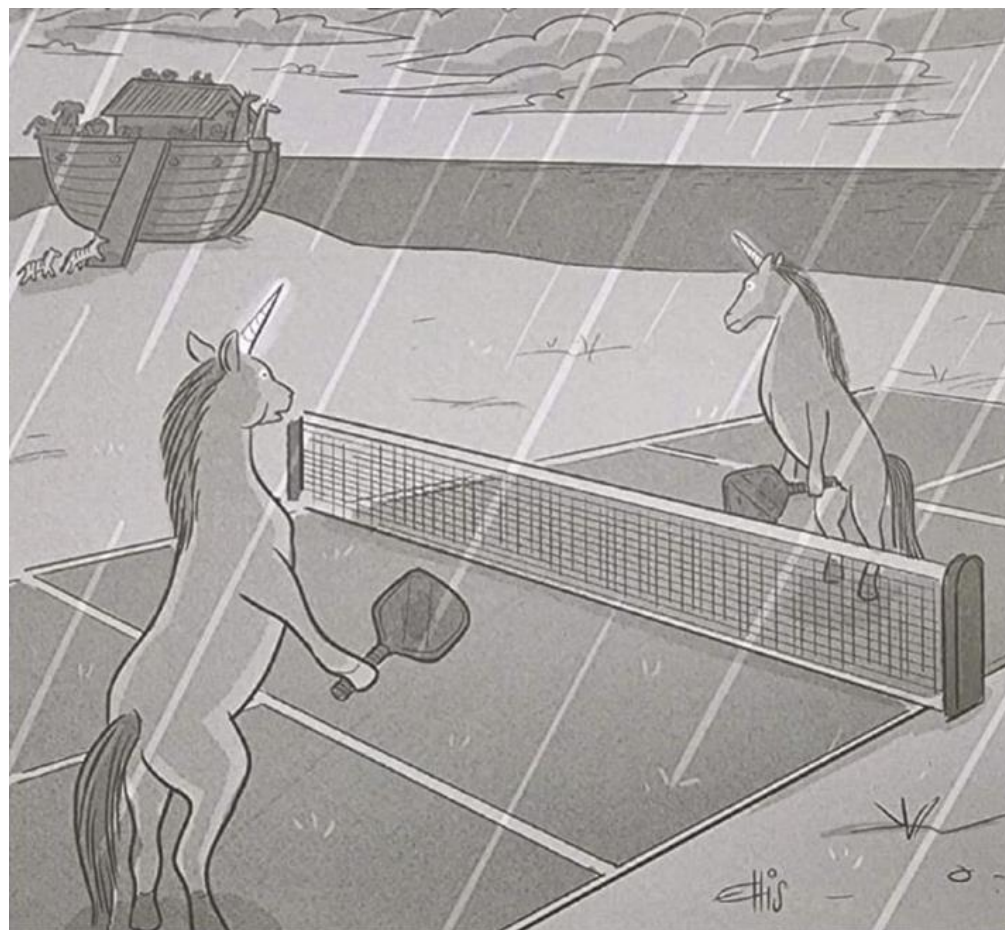




Estimated Net Worth 30,021 records enhanced 97.8% of [file](#)

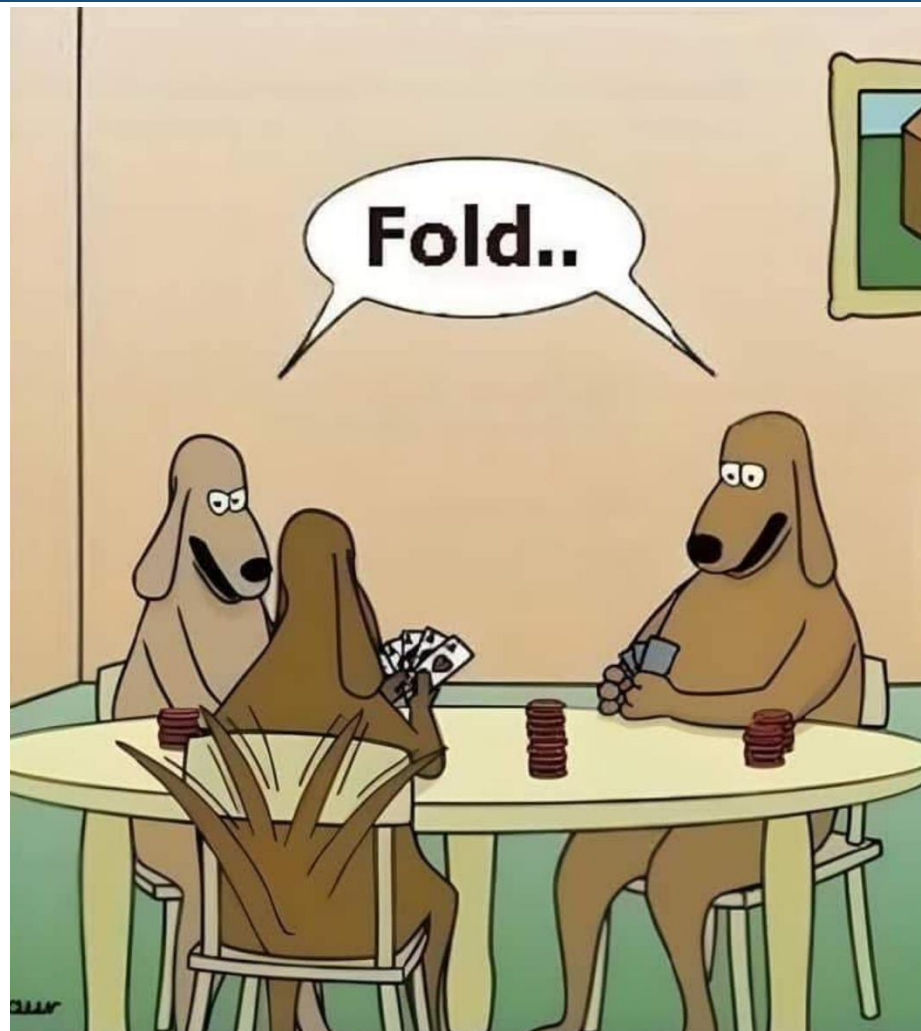
Variable ID	Variable Value	Count	% of Matched
2	Under \$4,999	342	1.14%
3	\$5,000 - \$9,999	159	0.53%
4	\$10,000 - \$24,999	418	1.39%
5	\$25,000 - \$49,999	431	1.44%
6	\$50,000 - \$99,999	961	3.20%
7	\$100,000 - \$249,999	2,827	9.42%
8	\$250,000 - \$499,999	4,628	15.42%
9	\$500,000 - \$999,999	5,818	19.38%
A	\$1,000,000 - \$1,999,999	5,706	19.01%
B	\$200,000,000+	8,731	29.08%

The Unrestricted Donor Is Becoming Extinct



"One more game, then we'll get on the ark."

Understanding Donors is Critical



Donors Are Looking for Real Value

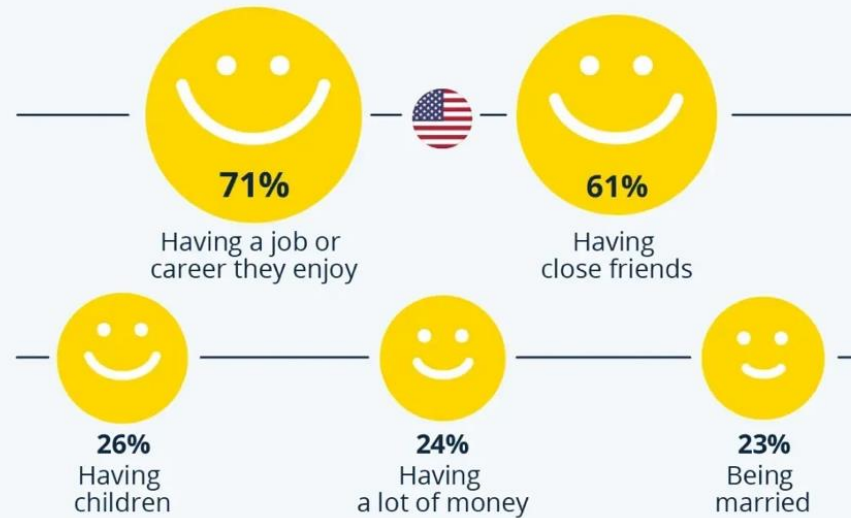
I still can't believe Aldi sells these for 25 cents. I've got 8 of them now and don't really even have a use for them, it was just too good of a deal to pass up.



Relationships are Key

The Key to Happiness?

Share of U.S. respondents who say each of the following is extremely/very important for a fulfilling life



5,073 U.S. respondents (18+ y/o) surveyed Apr. 10-16, 2023
Source: Pew Research Center

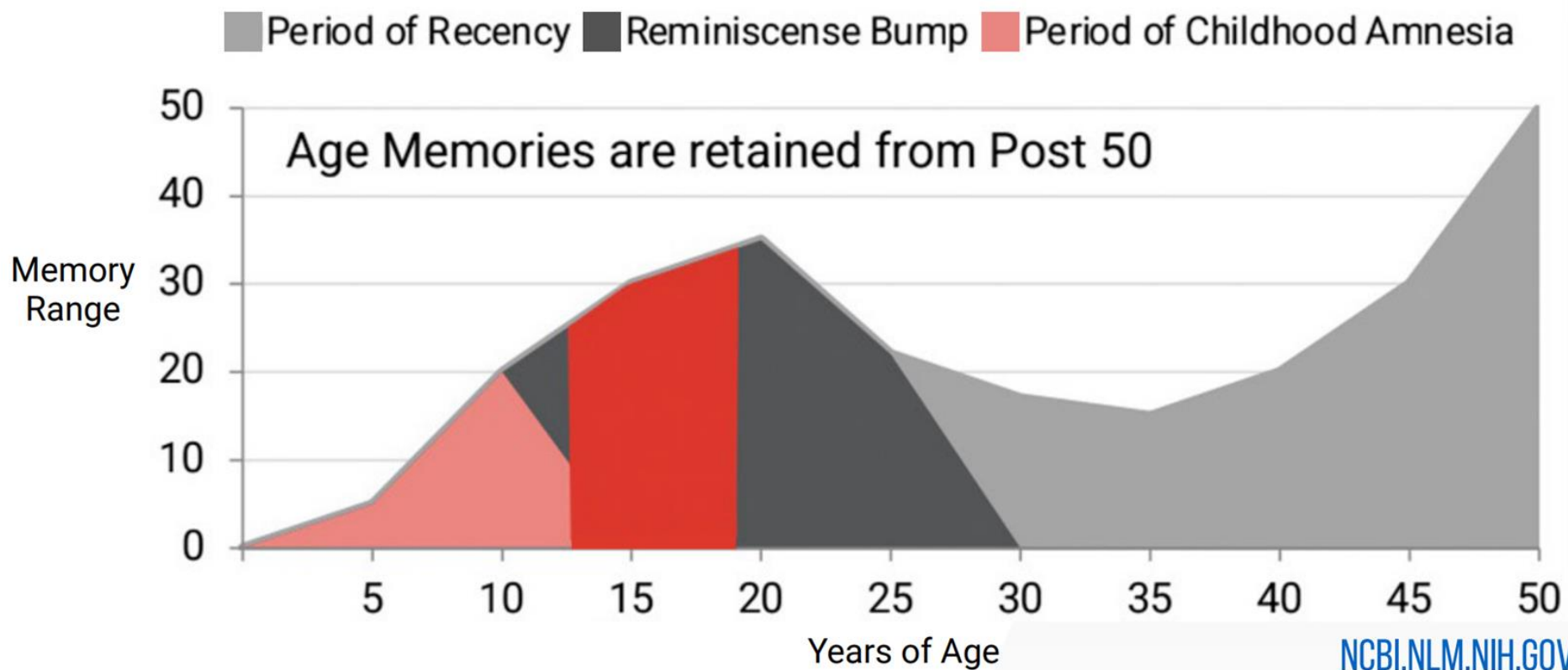


statista

Generational Divide



Are Donors in Your Family Funnel?



Planned Giving is Not Automatic



Steve Martin ✓

3d • 🌐



I brought my dog here AND HE DID NOTHING!



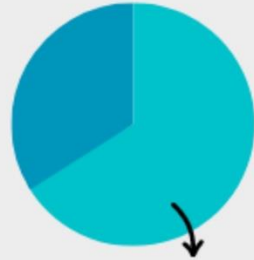
Employees Should Be #1

46%

of US workers leave
their jobs because of
a lack of appreciation.



Recognition Statistics



66%

Of employees say they would leave their job if they didn't feel appreciated



21%

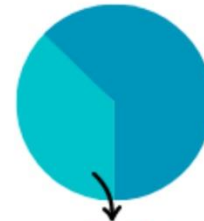
Higher profits were recorded in organizations with high employee engagement levels

Recognition does not have to be a significant outlay.



65%

Of employees prefer non-monetary incentives



41%

Of employees want to be recognized by a peer

You're Such a Good Dog



Planned Giving Leadership Can Build Family



Communicating Numbers Can Be Hard but Vital



Meeting Deadlines



Importance of Story and Metrics

- Data without stories are already forgotten
- Focus on the long term of 10 to 30 years
- What data is important to donors?
- What data is important about donors?
- Track data on your employees to support them
- Take care of your employee and donor family



How do we do that?

Personality Quiz

- Do we know ourselves?
- Do we know others?
- Why is this important?

- | | | | |
|------------------|-----------------|------------------|------------------|
| • Playful | • Strong-willed | • Analytical | • Adaptable |
| • Sociable | • Competitive | • Persistent | • Peaceful |
| • Promoter | • Resourceful | • Planner | • Diplomatic |
| • Funny | • Self reliant | • Scheduled | • Tolerant |
| • Lively | • Confident | • Thoughtful | • Listener |
| • Popular | • Decisive | • Behaved | • Balanced |
| • Undisciplined | • Frank | • Unforgiving | • Unenthusiastic |
| • Interrupts | • Impatient | • Critical | • Hesitant |
| • Wants credit | • Domineering | • Loner | • Indecisive |
| • Scatterbrained | • Stubborn | • Introvert | • Compromising |
| • Restless | • Rash | • Hard to please | • Nonchalant |
| • Changeable | • Crafty | • Suspicious | • Timid |

___ Total I

___ Total D

___ Total C

___ Total S

Results



- Sanguine



- Melancholy



- Choleric



- Phlegmatic

Most of Us Are Dogtroverts



Dogtroverts Are Awesome!



Optimistic vs Pragmatic

- Overexuberant vs pessimist



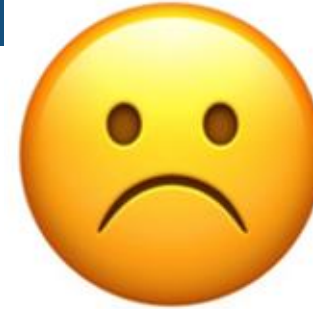
CEO-Choleric



CEO-Cholerics



- Ambitious
- Brave
- Decisive
- Determined



- Quick-tempered
- Bully
- Stubborn
- Not prone to listen

Sales-Sanguine



Sales-Sanguines



- Flexible
- Light-hearted
- Persuasive



- Flighty
- Exaggerates
- Needy

Accountant-Melancholy



Accounting-Melancholy



- Dependable
- Logical
- Unemotional
- Detailed



- Judgmental
- Tactical only
- Close minded
- Dogmatic

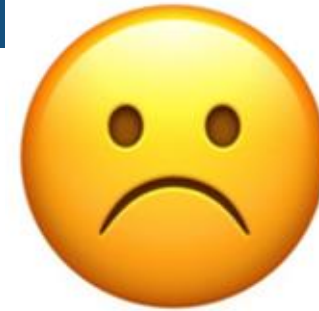
HR - Phlegmatic



HR - Phlegmatics



- Kind
- Patient
- Reliable
- Empathetic



- Indecisive
- Lack of focus
- Nonchalant

Do You Speak English?





Urgent Versus Important-Optional

