
 **LEARNING OUTCOME**

After participating...

...you will be able to objectively evaluate your advancement events.

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AGENDA

- Understanding Successful Events
- Surveying and Data Collection
- How to Evaluate and Eliminate a Failing Event

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UNDERSTANDING SUCCESSFUL EVENTS



CHAT

How does your shop
currently determine event
success?

EXCUSES

- We know everything
- Fear of evaluation impact
- We won't use the results...we never have
- No one is asking for it
- It takes too much time/too many resources
- Just one more thing to do

KEYS TO EVENT SUCCESS

- Engaged audience
- Seamless experience
- Successful ROI
- Mission driven content



Leveraging Metrics to Improve Advancement Events



ATTENDANCE DOESN'T EQUAL SUCCESS



- What if it's always the same crowd?
- What if they aren't the RIGHT 100 people?

REAL MEASURES OF EVENT SUCCESS

- ✓ 40% event attendee turnover
- ✓ Event satisfaction score increase
- ✓ P & L improvement every event
- ✓ LTV in the room improvement
- ✓ Attendee engagement
- ✓ Social media reach and interaction
- ✓ Fundraising success

ATTENDEE MIX

40% EVENT ATTENDEE TURNOVER

What does this look like at each organization?
How do we measure this robustly?

EVENT SATISFACTION SCORE



- What is a baseline score?
- How do you evaluate that?

The Net Promoter Score Question

Net Promoter® Score (NPS) Template

Exit this survey

* 1. How likely is it that you would recommend this company to a friend or colleague?

Not at all likely Extremely likely

0 1 2 3 4 5 6 7 8 9 10

The Net Promoter Score methodology is based on asking customers a single question that predicts the likelihood of both repurchase and referral: "How likely is it that you would recommend this company to a friend or colleague?" Customers rate their answers on a scale from 0 to 10.

The answers customers provide are classified as follows:

- 0–6 = Detractors—unhappy customers who can hurt your brand through negative word-of-mouth
- 7–8 = Passives—satisfied but indifferent customers who could be swayed by the competition
- 9–10 = Promoters—loyal customers who will keep buying and referring others

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Net Promoter Score Calculation

Here are 5 simple steps to calculate your Net Promoter Score:

- 1 Send the Net Promoter Score Questionnaire to your target demographic.
- 2 Download your survey responses into an Excel spreadsheet.
- 3 Within your spreadsheet, identify your respondents as Detractors, Passives and Promoters by adding up the total responses from each classification.
- 4 Generate the percentage total of each group by taking the group total and dividing it by the total survey responses.
- 5 Subtract the percentage total of Detractors from the percentage total of Promoters and this is your NPS.

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If it makes it easier, the equation for calculating a Net Promoter Score looks like this:

$$\frac{(\text{Number of Promoters} - \text{Number of Detractors})}{(\text{Number of Respondents})} \times 100$$

Example: If you received 100 responses to your survey:

10 responses were in the 0–6 range (Detractors)
20 responses were in the 7–8 range (Passives)
70 responses were in the 9–10 range (Promoters)

Calculating the percentages for each group gives you 10%, 20%, and 70% respectively.

Subtract 10% (Detractors) from 70% (Promoters), which equals 60%. Since a Net Promoter Score is always shown as just an integer and not a percentage, your NPS is simply 60.

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LIFETIME VALUE TO AN ORGANIZATION

- What is LTV?
- How do you determine LTV for a donor?
- Who monitors and upkeeps this information?

RESOURCE

LTV calculation					
Donations in 1 year	120				
Pre-debit attrition	10%				
Fulfillment rate	90%				
Attrition 1st year	40%	Retention 1st year	60%	% donor base eoy	60%
Attrition 2nd year	30%	Retention 2nd year	70%		42%
Attrition 3rd year	20%	Retention 3rd year	80%		34%
Attrition 4th year	10%	Retention 4th year	90%		30%
Attrition 5th year	10%	Retention 5th year	90%		27%
Cost of recruitment (sign-up)	85				
Yearly cost of continuing support per donor	5				
Without Costs					
	LTV 1 year	LTV 2 year	LTV 3 year	LTV 4 year	LTV 5 year
Gross Average LTV per sign-up	84	138	178	213	244
LTV gain per year		54	41	34	31
Considering Costs					
	LTV 1 year	LTV 2 year	LTV 3 year	LTV 4 year	LTV 5 year
Cost per year	3	2	1	1	0
Net average LTV per sign-up	-5	47	87	120	151
LTV gain per year		52	39	34	31

Input your values in the yellow cell
blue cells are the LTV results.

ATTENDEE ENGAGEMENT



How do you measure/gauge engagement?



■ SOCIAL MEDIA REACH & INTERACTION

- Event-specific hashtags
- Check-ins

Leveraging Metrics to Improve Advancement Events



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**FOLLOW-UP &
FUNDRAISING
SUCCESS**

- What happens after the event?
- DO you track giving immediately following?
- What is your standard follow up plan?

 **QUESTIONS**

CONCRETE ROI EVALUATION FOR EVENTS

- What to track
- How to track
- Determining success



Contacts				Gifts and Pledges								Proposals			Event History		
Pre-Event Contacts	Pre-Event Meaningful	Post-Event Contacts	Post-Event Meaningful	Pre-Event Pledges	Post-Event Pledges	Pre-Event Giving	Post-Event Giving	Gifts < 1 Month	Gifts < 3 Months	Gifts < 6 Months	Gifts < 1 Year	Ask Date	Ask Amount	Status	# Prior Events	# Events After	
						\$100											1
1	1	1	1			\$200	\$200	\$100	\$200	\$200	\$200						2
																	1
1	1	1	1			\$1,343											2
																	1
																	5
																	1
14					\$1,225	\$18,955	\$550	\$275	\$550	\$550	\$550						23
						\$30	\$50	\$50	\$50	\$50	\$50						5
3					\$10,000	\$5,000	\$19,265										17
40	2					\$207,942	\$10,000	\$5,000	\$10,000	\$10,000	\$10,000	7/15/2011	\$60,000	All \$ Booked		4	
2	1	1	1		\$150		\$200										2
					\$100		\$2,130	\$1,000	\$1,000	\$1,000	\$1,000						14
14	2				\$250,000		\$41,090										15
																	1
							\$52										7
						\$50	\$4,286										4
						\$240	\$480	\$300	\$300	\$300	\$300						1
						\$2,100	\$35										1
1																	1
																	1
70	20	2	2			\$189,400	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	9/27/2001	\$200,000	All \$ Booked		17	
							\$250	\$200	\$200	\$200	\$200						1
53	7	1	1		\$17,500		\$23,845	\$2,500	\$2,500	\$2,500	\$2,500	11/10/2009	\$12,500	All \$ Booked		68	
65	12	1	1		\$4,525,000		\$1,676,000					8/2/2004	\$1,500,000	All \$ Booked		2	
338	8				\$6,116,794	\$25,000	\$352,667					2/26/2004	\$100,000	Committed	200	13	
28	21	1	1		\$60,000		\$410					7/15/2013	\$100,000	Committed		5	
13	2				\$3,638		\$13,207	\$2,500	\$2,500	\$2,500	\$2,500						14

WHAT TO TRACK

- Lifetime giving history of those in attendance
- Repeat attendees
- Collection of attendee data, emails, cell phones
- Length of event attendance

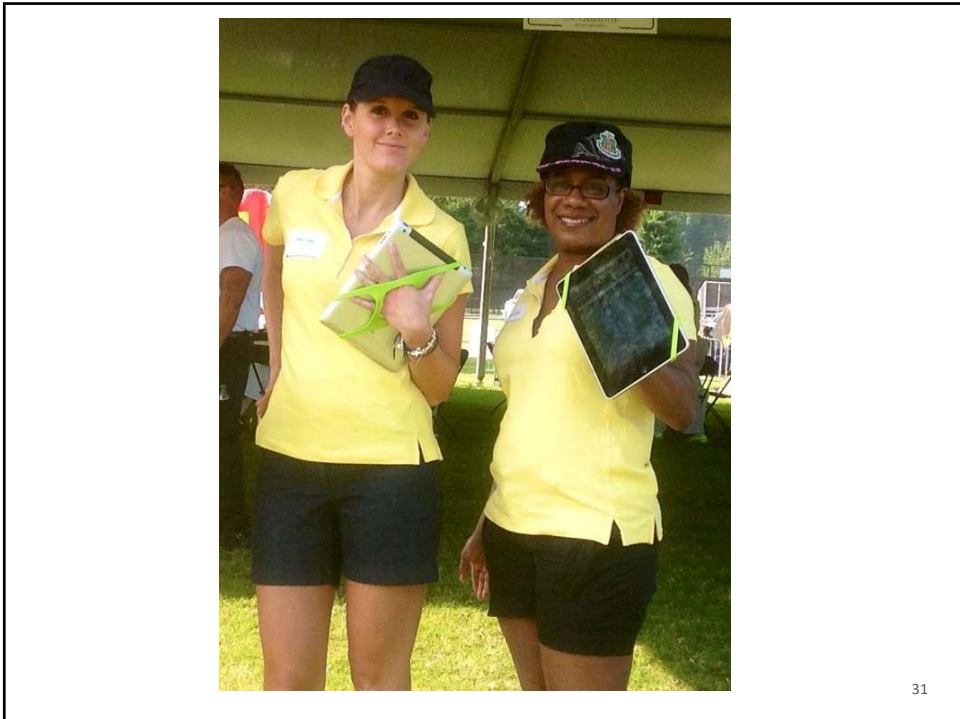


WHAT TO TRACK

- Communication success
- No show rate
- Registration rate
- Unexpected attendee rate



Leveraging Metrics to Improve Advancement Events



HOW TO TRACK



Guest check-in powered by
CheckInEasy.com



HOW TO TRACK



Check In Easy

Text and Email Alerts
Get notified when your special guests arrive

CheckInEasy.com



HOW TO TRACK



Check In Easy . . . In Action . . . Event Stats

Find out how many guests are in your event with the touch of the button.



Strictly Private and Confidential

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HOW TO TRACK



TAKEAWAYS

DETERMINING SUCCESS

- What % of invitees registered?
- What % of registrants checked in?
- What % of attendees gave a gift in the week/10 days following the program?



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SURVEYING AND DATA COLLECTION



KEYS TO SUCCESSFUL FEEDBACK

- Focus groups and surveys work
- They allow people to speak anonymously
- They allow you to track trends and forecast for the future



THE CURRENT PROBLEM



THE SOLUTION


George F. Whitworth Honors Banquet Non-Attendance Survey


* 1. Why were you unable to attend the George F. Whitworth Honors Banquet, held this year on Sunday, March 3, at The Lincoln Center in central Spokane?

- I was/we were out-of-town.
- It was on a Sunday.
- I/we don't attend events after dark.
- I/we don't enjoy this kind of event.
- Other (please specify)


THE SOLUTION

Unfortunately, you were unable to join us for the Seattle President's Club Dinner this year. We have designed a simple set of questions for those invitees who did not attend in order to help us target the very best time and format for our annual Seattle donor thank-you event. Thank you for your participation.



 **RESOURCE**

Follow-up Survey: Did Not Attend





RESOURCE

Follow-up Survey: Attendee



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HOW TO EVALUATE AND ELIMINATE A FAILING EVENT



STEPS TO ELIMINATION

1. Meet with key stakeholders
2. Eliminate emotion
3. Evaluate ROI
4. Evaluate measures of success
5. Sunset
6. Celebrate

FOCUSING ON MISSION-CENTRIC EVENTS

- Events should tie back to your mission
- They should have moments at which your mission becomes clear to attendees
- Consider interactive events or pairing attendees with beneficiaries for maximum interaction


SHIFT YOUR EVENTS




- Donor expectations
- More intimate
- Hands-On experiences

CREATING OTHER OPPORTUNITIES FOR EVENT VOLUNTEERS

- More than just stuffing envelopes
- Check in with an iPad
- Staffing stations that require interaction
- Hosting experiences or tours
- Allowing them to “get their hands dirty”
- More than just tastings and flower arrangements

 RESOURCE

Event Evaluation Form

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 RESOURCE

Event Summary Form

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 **QUESTIONS**



 **EVALUATION**

Thank you!

Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.

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