Make Metrics Make Sense

A guide for fundraising leaders and their teams

Anne Murphy
Empowered Fundraiser Consulting

Use this guide to review fundraiser activity, evaluate gift credit, and agree on changes with the people whose performance is being measured.

Start with the purpose of each metric. A visit count can help a manager understand activity. A gift total records a result. Understanding a fundraiser's contribution also requires the history of the portfolio and the work other people did to make the gift possible. None of them alone tells the real story, though.

Use the guide with your team

Part	Pages	Use
Review the approach	2–4	Read about activity, gift credit, equity, and communication.
Complete the assessment	5	Answer the six questions individually. Bring an example for each answer.
Discuss the findings	6–7	Review one metric and one gift-credit example together.
Agree on the changes	8	Record the decision, responsible person, and review date.

Print one copy of pages 5 and 7 for each participant. Use page 8 to record the team's agreed changes. The complete guide includes the reading and the team materials in one PDF.

Start with the purpose of the metrics

Consider what you want to accomplish in tracking fundraiser activity and outcomes.

Decide which decision each measure should inform. Coaching a new fundraiser, forecasting gifts, and evaluating a promotion require different evidence. Write down the intended use before setting a target.

Measure	What it records	Context to discuss
Activity	Outreach and substantive donor conversations	Who responded, what was learned, and the agreed next step.
Progress toward gifts	Open proposals and movement through gift decisions	The donor's interests, decision process, timing, and obstacles.
Results	Gifts, dollars, and retention	Portfolio opportunity, inherited relationships, and colleagues' contributions.

Leading indicators describe activity or progress that may precede a gift. Lagging indicators record results after they occur. Review them together. A high activity count alone does not establish that donors are moving toward a gift, and a gift total alone cannot explain how the result was achieved.

Account for the portfolio

Compare the opportunity available to each fundraiser. Review the size and maturity of the portfolio, the giving opportunities they can offer, and the staff time available for donor work. Document changes in assignment or responsibility during the review period.

Engage frontline staff in establishing metrics. Listen to their concerns and highlights about their portfolio--you'll need their first-person findings to create effective metrics. Their qualitative feedback is as important as the quantitative data you'll review.

Examine equity in the expectations

Discuss how racism and other forms of bias affect access to donors, credibility, and the effort required to make progress. A fundraiser's account of those experiences belongs in a review of expectations. Leadership should explain how it will address barriers and protect staff when a donor behaves inappropriately.

Review promotion and recognition decisions with this context. Identify work that contributes to a gift but receives little visibility in the report. The gift-credit discussion on the next page makes those contributions easier to examine.

Rethinking gift credit

From Anne Murphy's December 12, 2023 FundraisingNOW essay.

At Empowered Fundraiser, employee engagement is our North Star. We worry less about donor retention than staff retention--without highly engaged fundraisers, we won't have donors to retain...

The problem with giving gift credit

Our current system of assigning gift credit may not reflect the reality of the team effort behind each gift, and may create or reinforce biases and inequalities among the staff.

- Current metrics attribute the success to 1-3 fundraisers, ignoring the others who contributed
- This can create a sense of marginalization, dispiritedness, and unfairness among the staff
- This can also reinforce existing privileges and disadvantages based on gender, race, and factors like:
- Whose program has compelling giving opportunities?
- The disparate potential across portfolios--mine was worth 400M at one point, 400K at another
- "Freebies"--donors and gifts a senior fundraiser will inherit

The solution for better credit

We need to find a better way to deal with gift credit, by improving our systems and culture around them.

Make expectations and decisions visible

Before diving in, establish a transparent process. It should include who will be involved, what data will be reviewed, and who has decision rights. The process should be rolled out for feedback before launching.

Invite frontline fundraisers into the discussion before changing the expectations used to evaluate them. Include the colleagues who maintain the data and the people who use it in staffing or promotion decisions. Explain how feedback will influence the decision and who will make the final call.

Talk with fundraisers about their reports

"Are you talking with your development officers or about your development officers?"

That question from the white paper belongs at the center of the review. Discuss the report with the person it describes. Ask what context is needed to understand the numbers and what changed during the period. Agree on a next step that would improve the fundraising work.

Who has access to the metrics reports? Do the development officers know that?

What's at stake? Do development officers understand the consequences of not meeting metrics?

Did you document and share how you arrived at the metrics expectations?

Review the behavior the measure encourages

Anne's white paper applies Tema Okun's work on white supremacy culture to fundraiser metrics. It examines quantity over quality, either/or thinking, the assumption that progress always means more, and the belief in only one correct approach. Use these ideas to examine a specific practice and its consequences. [1]

Discuss visits scheduled mainly to satisfy a count, gifts that create obligations the organization cannot meet, or recognition that rewards dollars while overlooking harmful behavior. Decide how the organization will recognize sound judgment and ethical decisions in its evaluations.

Include staff safety and the quality of working relationships in the discussion. Review the Fundraiser Bill of Rights reading listed on page 8, and agree on how staff can raise concerns about donor conduct or unfair expectations.

Explain the change before using it

Share the definition, reporting period, and intended use of each measure. Explain the data access rules and the process for correcting a record. Give staff the date when a revised expectation will take effect and the date when the team will review it.

Six questions for your metrics review

Complete this page individually before the team discussion. Use 1 for no and 5 for yes. Choose an intermediate score when your answer falls between them. Record a specific example or a question you need answered.

1. Would you recommend your organization's metrics framework to another organization?

Score _____ / 5 Example or question

2. Would you recommend frontline fundraisers work for an organization with your metrics framework?

Score _____ / 5 Example or question

3. Is the process for establishing metrics inclusive?

Score _____ / 5 Example or question

4. Do you believe your metrics framework motivates positive behavior from fundraisers?

Score _____ / 5 Example or question

5. Do you feel your metrics framework engenders employee engagement?

Score _____ / 5 Example or question

6. Do you believe your metrics framework helps the organization raise more money?

Score _____ / 5 Example or question

Optional total _____ / 30. Six completed ratings produce a total from 6 to 30. Review each answer and the reasons behind it. Differences between people can identify a policy or practice that needs discussion.

For discussion, choose the question with the clearest example of a practice you want to keep or change.

Use the guide with your team

The leader facilitates the conversation and participates in the assessment. Everyone should understand how their comments will be recorded and used. Provide a private way to contribute concerns when speaking in a group could create risk.

Prepare the materials

Share this guide and the current metrics definitions before the meeting. Bring a recent report, the gift-credit policy, and the criteria used in performance reviews. Participants complete the six questions independently. Use donor examples with identifying details removed.

1 Agree on the purpose

State which decision the group is making. For example, review whether the visit measure encourages useful donor conversations, or whether gift credit recognizes the team's contribution. Explain the facilitator's role and who can approve a change.

2 Compare the assessment answers

Discuss one question at a time. Begin with the examples behind the ratings. Record differences in experience, including differences between managers and frontline staff. Ask what information would help explain those differences. The leader can respond after others have contributed.

3 Examine one metric

Use page 7 to connect the measure to its intended purpose. Compare the behavior it encourages with the fundraising work the team needs to do. Include portfolio conditions and barriers that affect the result. Write down the evidence needed to evaluate a change.

4 Trace one gift

Review a recent gift from first engagement through the donor's decision. Identify the contributors at each stage, including colleagues who were no longer in the role when the gift closed. Compare that contribution record with the credit recorded in the report.

Discuss how the credit affects recognition or career advancement. Distinguish the organization's gift total from the record of staff contributions. Count the gift once in the organization's total and document each person's contribution for the appropriate review.

5 Record the decision

Use page 8 to choose a change, assign responsibility, and agree on a review date. Record any question that remains unresolved and the person responsible for obtaining the missing information. Share the decision with everyone affected before the revised expectation takes effect.

Team worksheet

Team or unit _____ Date _____

Review one metric

Current measure and definition

Decision this measure should inform

Behavior it encourages and an example from our work

Portfolio conditions or barriers to consider

Proposed change and evidence we will review

Trace the contributions to one gift

Use a donor code or a brief description with identifying details removed. Record the work people did and how the current policy recognizes it.

Stage or contribution	Person or role	Credit or recognition now

Change to discuss _____

Agree on the changes and review them

Choose a manageable change and document it. Repeat this page for each agreed change. A useful review includes both the fundraising results and the experience of the people working toward them.

Change we agreed to make and reason for it

Person responsible and people whose input is needed

Definition and data we will use to evaluate the change

Effective date _____ **Review date** _____

How we will explain the change to staff

At the review

Ask the team what changed in the activity and in the donor conversations. Review the results with portfolio context. Discuss whether the change improved clarity, recognition, or collaboration. Record whether to continue it, adjust it, or stop it, and explain the decision.

Continue the conversation in management practice

Use regular coaching conversations to discuss the reports. Recognize contributions that a gift total cannot describe. Connect development opportunities and mentoring to the skills people want to strengthen. Invite feedback about the consequences of the metrics and revisit the expectations when assignments change.

Source materials and further reading

Anne Murphy's source materials include Metrics Recommendations 2023_final (cover titled Make Metrics Effective in FY25), the six-question Assessment Tool, the December 12, 2023 FundraisingNOW essay Make Metrics Make Sense: Rethinking Gift Credit, the Metrics Carousel, and Nurturing a Balanced Metrics Culture: A Leader's Guide. The team sequence and worksheets adapt these ideas for a shared review.

[1] Tema Okun, Progress Is Bigger and More / Quantity Over Quality, and Characteristics of White Supremacy Culture.

[2] Amelia Garza, supported by Jennifer T. Holmes, Fundraiser Bill of Rights — Creating Equitable Partnerships, Advancing Philanthropy, April 2021. Find the article in the issue's online exclusives.

Further Reading

Keep the one-to-one relationships and keep up with every donor in your portfolio at once.

How to Scale Your Major Gift Work Across a Large Donor Portfolio

Prepare for your next donor conversation.

The Donor Conversation Guide

Related workshops and programs

Make Fundraising Metrics Make Sense

The Balancing Act: Navigating Metrics, Meaning, and Impact in Fundraising

The Campaign Launch Lab, Spring 2027 Cohort

Work on your organization's campaign plan through a guided cohort. Review the complete plan with Anne in a private capstone and finalize your implementation roadmap. Your team implements the plan.

Complete the Campaign Launch Lab Application