2013 Peer-to-Peer Benchmark Report Comparison

Do-It-Yourself Reporting Recommendations

**Overview**

The following guide is intended to serve as a recommendation on reporting options for side-by-side comparisons to Blackbaud’s 2013 Peer-to-Peer Benchmark Report. This process will help clients identify data trends related to Key Performance Indicators (KPI) for both event level data as well as participant segment data. You will use this guide’s instructions for running and manipulating your event data and the accompanying Peer-to-Peer Benchmark Report Excel Workbook to generate an easy-to-read benchmark comparison dashboard.

The recommendations outline steps to run two report writer reports from Luminate Online to provide you with all the data you need to analyze specified KPI’s outlined in the benchmark report. The excel workbook provided is a series of worksheets that allow you to plug in your event data and have the KPI’s calculated for you and presented in comparison to the reported benchmarks.

The 2013 Peer-to-Peer Benchmark Report categorizes “typical” events - rides, walks, races and endurance events. Clients using Blueprinting and/or Multi-Center or using TeamRaiser to serve a non-traditional campaign may still find value in running these reports and utilizing the tools in the excel workbook to calculate the KPI’s. With these circumstances, direct comparison to the benchmark data may be less influential, but seeing organizational event trends can still illustrate areas of strength and opportunity.

In this document, you will find instructions for:

* Running recommended Report Writer Reports
* Event Level Data analysis
* Participant Level Data analysis

Have questions or troubles implementing this kit? Ask us in the Community and we’ll help get you going!

<http://community.convio.com/t5/Webinars-Kits-Downloads/bd-p/kitstemplatesdownloads>

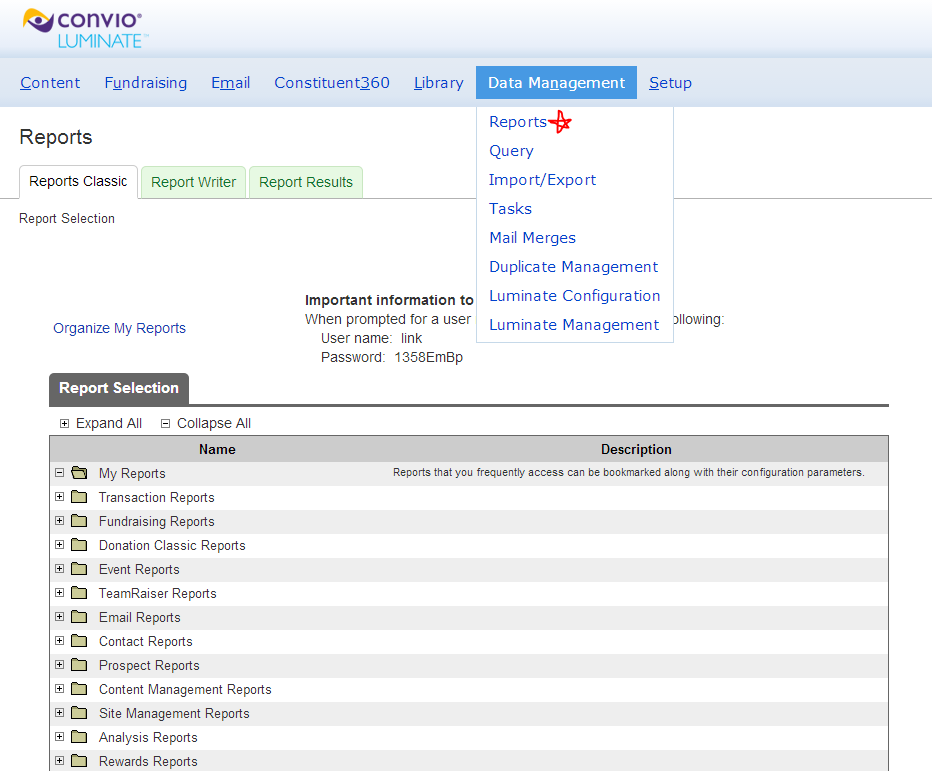
**Recommendations for Reporting on Benchmark Data**

You will run two reports from Report Writer in Luminate Online. Run both reports consecutively and save them to your computer as you prepare them for data manipulation and inputting into the accompanying excel workbook.

1. **TeamRaiser – Performance by Event**
2. **TeamRaiser –Cross-Event Registrations**

If you haven’t taken any training on how to use Report Writer, you can find on-demand training on the Luminate Learn Center (<http://customer.convio.com>) under Data Management.

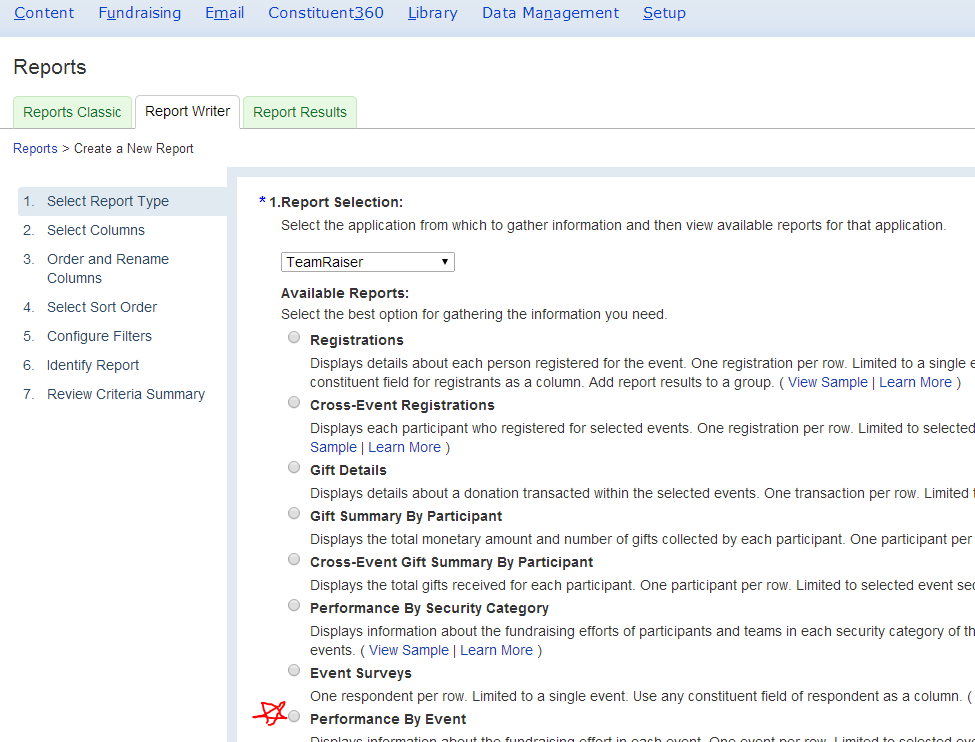
To access Report Writer in Luminate go to Data Management 🡪 Reports 🡪 Report Writer



**Performance by Event Report**

Create a New Report

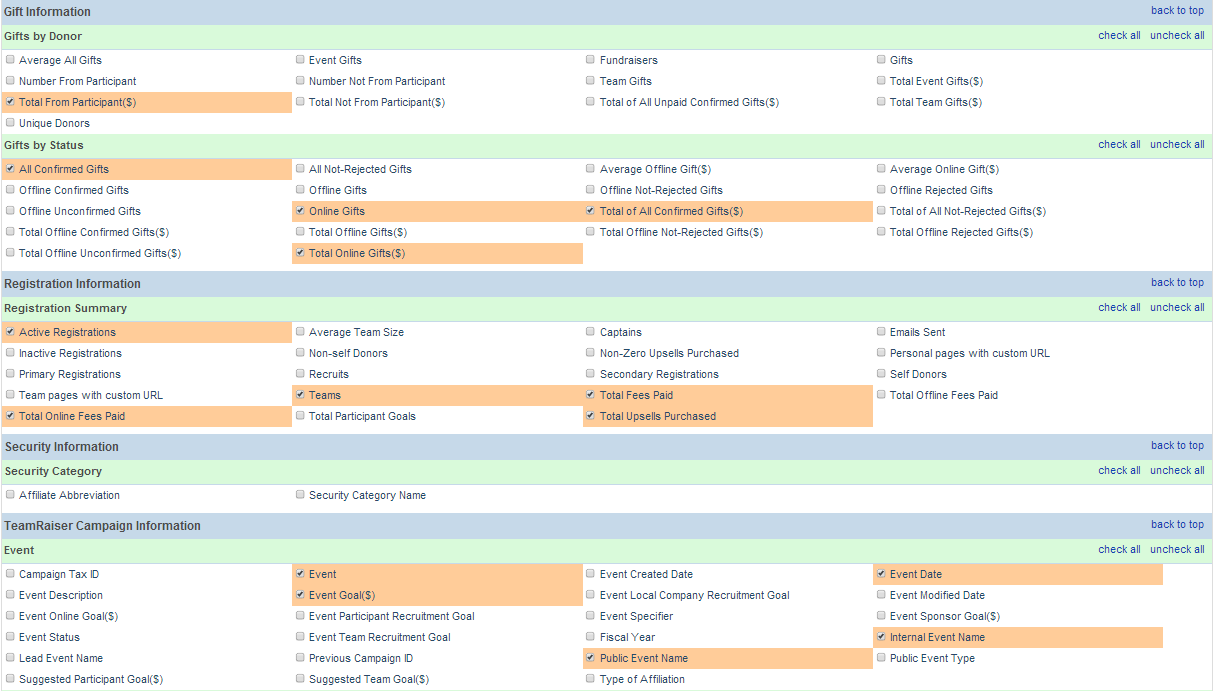
1. Select Report Type: Performance By Event



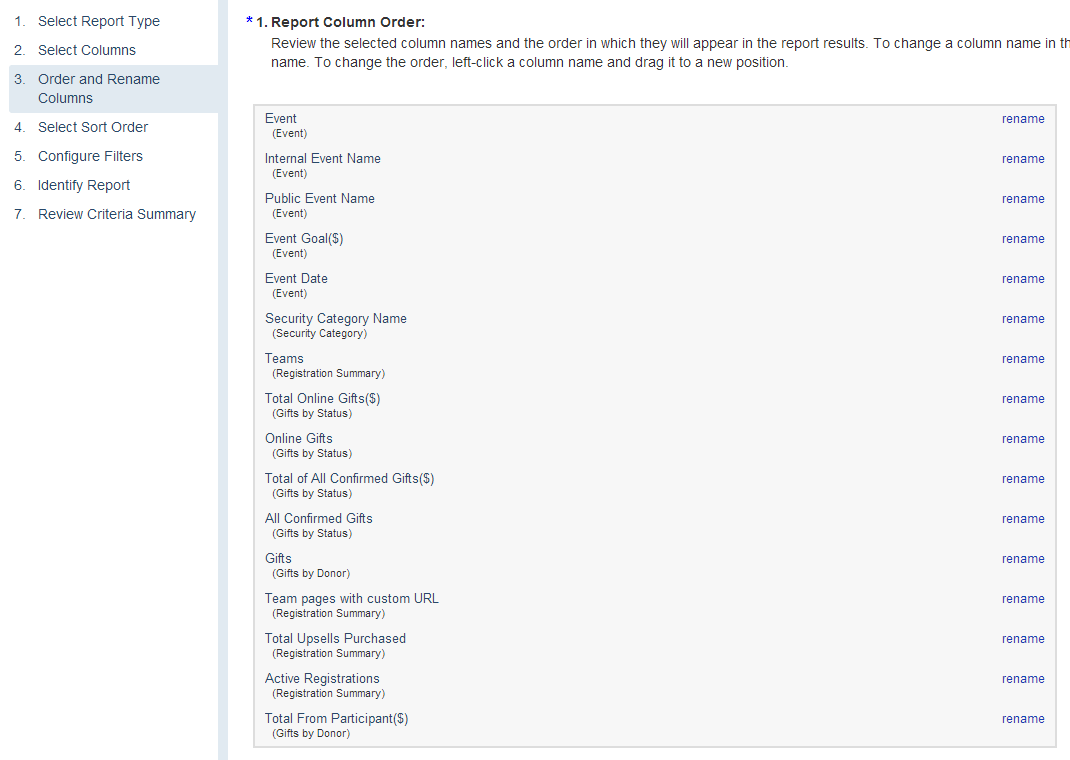
1. Select Columns:
   1. Gifts Information
      1. Total From Participant($)
   2. Gifts by Status:
      1. Total Online Gifts($)
      2. Online Gifts (gives # of gifts)
      3. Total of All Confirmed Gifts($)
      4. All Confirmed Gifts
   3. Registration Info
      1. Active Registrations (gives # of active registrations)
      2. Teams
      3. Total Online fees paid
      4. Total fees
      5. Total Upsells purchased
   4. TR Campaign Info
      1. Event
      2. Internal Event Name
      3. Public Event Name
      4. Event Goal($)
      5. Event Date

All column options are listed alphabetically within each category. If you can’t find a column us the Ctrl +F function to search for the term you’re looking for

e.g.



1. Order and Rename Columns:
   1. This step is only necessary if you want to change column headers or reorganize how your data will appear on the final report. For the purposes within this guide we will not be making any adjustments to the default layout.

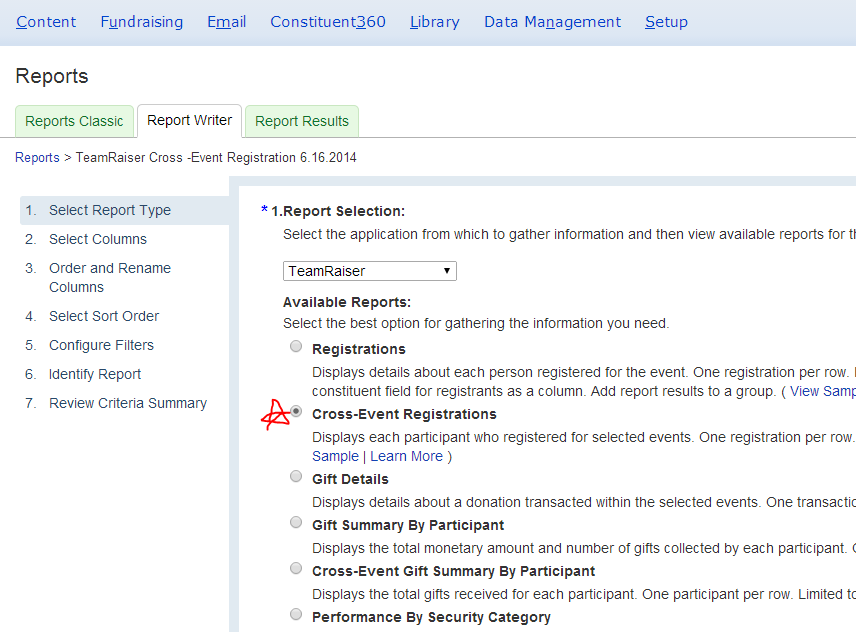


1. Select Sort Oder:
   1. You can choose to present the date in order of any of the columns you’ve selected for the report itself. For the purposes within this guide we will not be identifying any sort order.
2. Configure Filters:
   1. If needed, create filters to target the events you’re analyzing. The required filter for this report is Security Category. Many organizations utilize one security category, but if you use more than one, be sure to know which security category your TeamRaiser event(s) is housed under for reporting purposes.
   2. You can confirm which Security Category your event is associated with by going to Fundraising 🡪 TeamRaiser 🡪 Edit 🡪 Identify TeamRaiser Step #4: Security Category.
   3. If you have several TeamRaiser events under one security category and only want to report on a certain number of years, or certain set of events, you can add additional filters as needed.
3. Identify Report:
   1. Label report
4. Review Criteria Summary:
   1. Confirm columns and filters and select Save Report
   2. The report will now be stored under the Report Writer tab for future use.
5. Run Report:
   1. Go back to the Report Writer tab and search for the report you just saved and select Run Report.
   2. The results will appear in the Report Results tab when they are ready.
   3. Download the report to a CSV file and save.

**Cross-Event Registration Report**

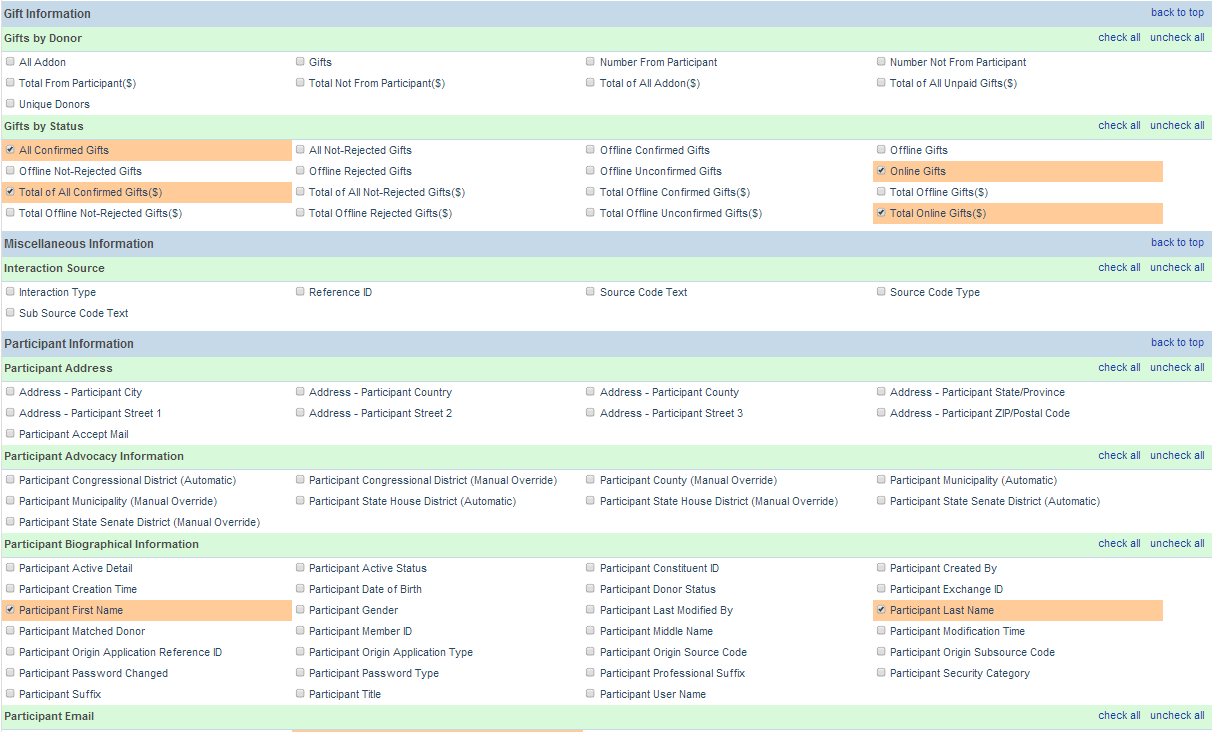
**Create New Report**

1. Select Repot Type: Cross-Event Registrations



1. Select Columns:
   1. Gift Information
      1. Total From Participant ($)
      2. Total Online Gifts ($)
      3. Online Gifts
      4. Total All Confirmed Gifts ($)
      5. All Confirmed Gifts
   2. Participant Information
      1. Participant First Name
      2. Participant Last Name
      3. Participant Email
      4. Participation Type Name
   3. Registration Information
      1. Is Team Captain
      2. Personal Page Last Updated Date
      3. Registration Date
      4. Self Donor
      5. Additional Gift Amount($)
      6. Fees Paid Amount ($)
      7. Upsell Total Amount ($)
      8. Is Prior Participant
      9. Emails Sent
   4. Team Information
      1. Team Name
   5. TeamRaiser Campaign Information
      1. Internal Event Name
      2. Public Event Name
      3. Event Date

e.g.



1. Order and Rename Columns:
   1. This step is only necessary if you want to change column headers or reorganize how your data will appear on the final report. For the purposes within this guide we will not be making any adjustments to the default layout.

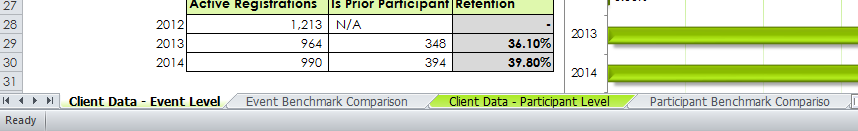


1. Select Sort Oder:
   1. You can choose to present the date in order of any of the columns you’ve selected for the report itself. For the purposes within this guide we will not be identifying any sort order.
2. Configure Filters:
   1. If needed, create filters to target the events you’re analyzing. The required filter for this report is Security Category. Many organizations utilize one security category, but if you use more than one, be sure to know which security category your TeamRaiser event(s) is housed under for reporting purposes.
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3. Identify Report:
   1. Label report
4. Review Criteria Summary:
   1. Confirm columns and filters and select Save Report
   2. The report will now be stored under the Report Writer tab for future use.
5. Run Report:
   1. Go back to the Report Writer tab and search for the report you just saved and select Run Report.
   2. The results will appear in the Report Results tab when they are ready.
   3. Download the report to a CSV file and save.

**Event Level Data Analysis**

Now that you’ve run, downloaded and saved both reports, you can begin the data manipulation and identifying the data fields needed to populate the accompanying Peer-to-Peer Benchmark Excel Workbook.

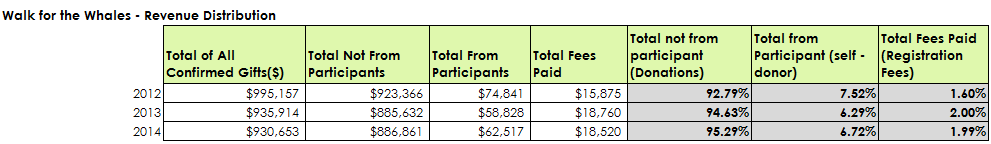
The Excel Work book is divided into two input pages and two output pages. We have broken the data reporting into two categories, Event Level data and Participant Level Data.



Event Level Data Performance Indicators :

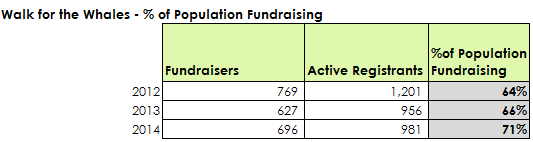
1. **Revenue Distribution:** This metric will calculate the total funds received from three categories; donations, registration fees and self-donations
   1. Sort Performance by Event Report by Event Name and date– separate data by event as needed
   2. Sum Total All Confirmed Gifts ($)
   3. Sum Total Not From Participant (Donations $)
   4. Sum Total From Participant (Self-Donations)
   5. Sum Total Fees Paid (Registration Fees)
   6. Populate Peer-to-Peer Excel Workbook **Client Data – Event Level** tab with totals

e.g.



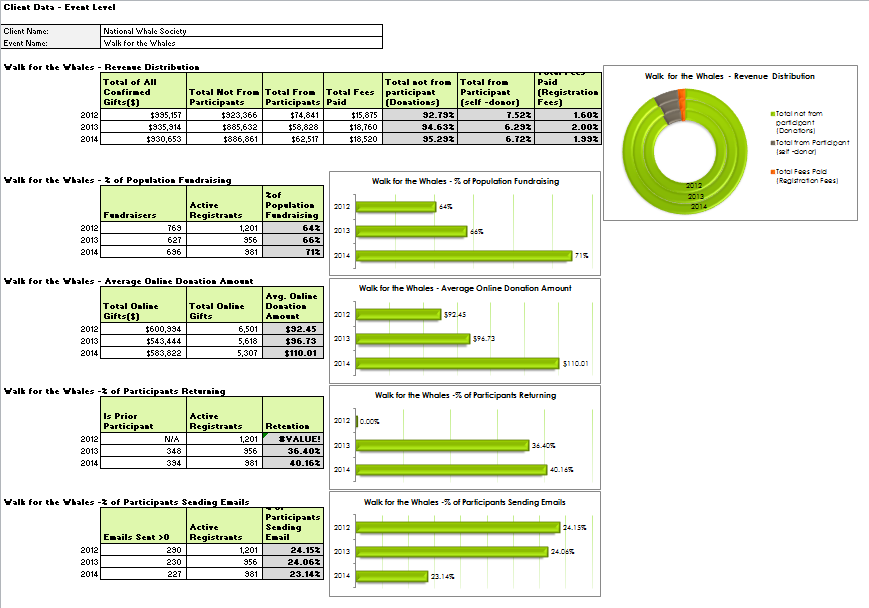
1. **% of Population Fundraising:** # of Fundraisers/ Active Registrants
   1. Sort Performance by Event Report by Event Name and date – separate data by event as needed
   2. Sum Fundraisers
   3. Sum Active Registrants
   4. Populate Peer-to-Peer Excel Workbook **Client Data – Event Level** tab with totals

e.g.

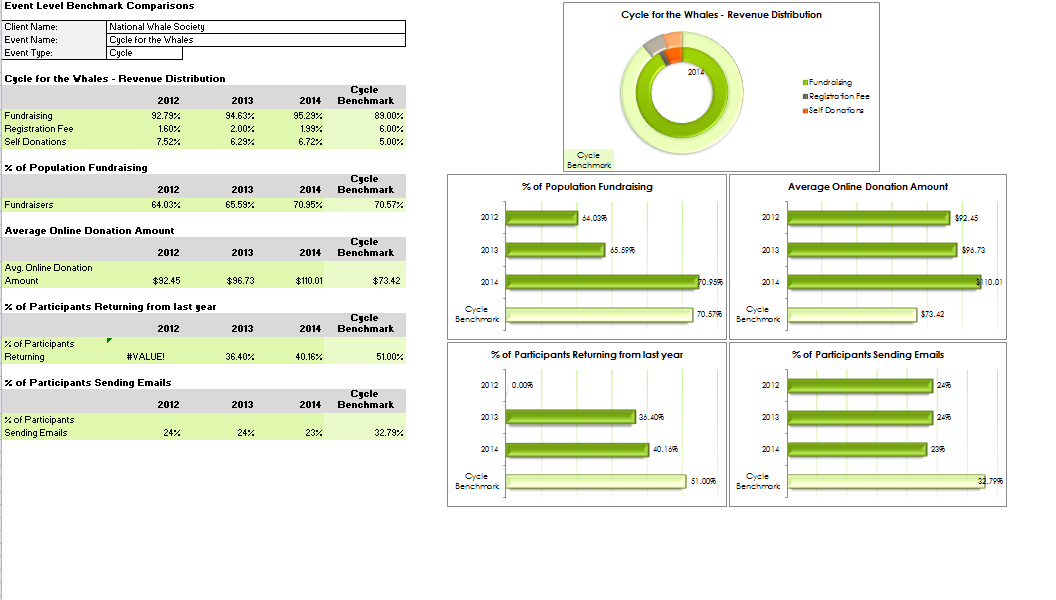


1. **Average Online Donation Amount:** Total Online Gifts ($) / Total Online Gifts
   1. Sort Performance by Event Report by Event Name and date – separate data by event as needed
   2. Sum Online Gifts ($)
   3. Sum Total Online Gifts
   4. Populate Peer-to-Peer Excel Workbook **Client Data – Event Level** tab with totals
2. **% of Participants Returning:** Is Prior Participant/ Active Registrants
   1. Sort Cross-Event Registration Report by Event Name and date – separate data by event as needed
   2. Sort data by Is Prior Registrant – sum total of prior participants
   3. Populate Peer-to-Peer Excel Workbook **Client Data – Event Level** tab with totals
3. **% of Participants Sending Emails:** Emails Sent >0/Active Registrants
   1. Sort Cross-Event Registration Report by Event Name and date – separate data by event as needed
   2. Sort data by Emails Sent – sum total of participants with emails sent >0
   3. Populate Peer-to-Peer Excel Workbook **Client Data – Event Level** tab with totals

Your Event-Level Data input worksheet will look like this:



The next tab is the Event Benchmark Comparison tab which will be automatically updated with your calculated performance indicators compared to benchmark data:



**Participant Level Data**

All Participant Level Data will be pulled from the Cross-Event Registration report. It is recommended that you begin by sorting the cross-event registration data into the events you wish to analyze. For the purposes of this guide and the excel worksheet, it is recommend to begin with the most recent event year’s data.

1. Before identifying any values, it is recommended that you creating tabs of data for each segment you want to drill down into. For the purposes of this guide we’ll be analyzing the following segments:

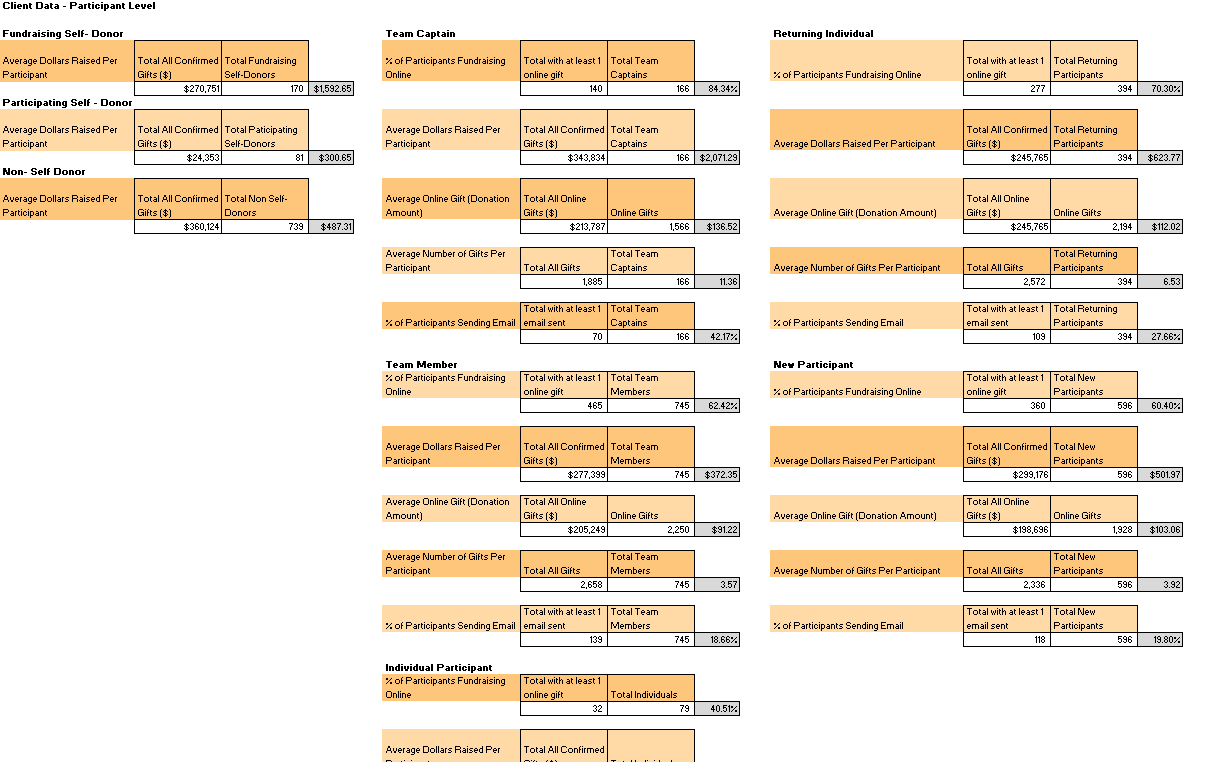
* **Non Self –Donor:** Sort file by Self-Donor status copy/paste all FALSE participants to new worksheet
* **Fundraising Self-Donor:** Sort remaining file (removed Non Self-Donor records) by All Confirmed Gifts – those with gift counts > 1 are Fundraising Self- Donors
* **Participating Self-Donor:** Sort remaining file (removed Non Self-Donor records) by All Confirmed Gifts – those with gift count = 1 are Participating Self- Donors (did no additional fundraising)
* **Team Captain:** Sort file by Is Team Captain and paste all TRUE to a Team Captain Worksheet
* **Team Member:** Sort file by Team Name and paste all participant records with a Team Name populated in a Team Member Worksheet. Sort again by Is Team Captain and Delete all records with TRUE.
* **Individual Participant:** Sort file by Team Name and paste all participant records with no Team Name in an Individual Participant Worksheet.
* **New Participants:** Sort file by Is Prior Participant paste all Yes to a Returning Participants Worksheet
* **Returning Participants:** Sort file by Is Prior Participant paste all N/A to a New Participants Worksheet

1. Once you’ve organized your data by segment, you can analyze data for all Key Performance Indicators (KPIs) for each segment:

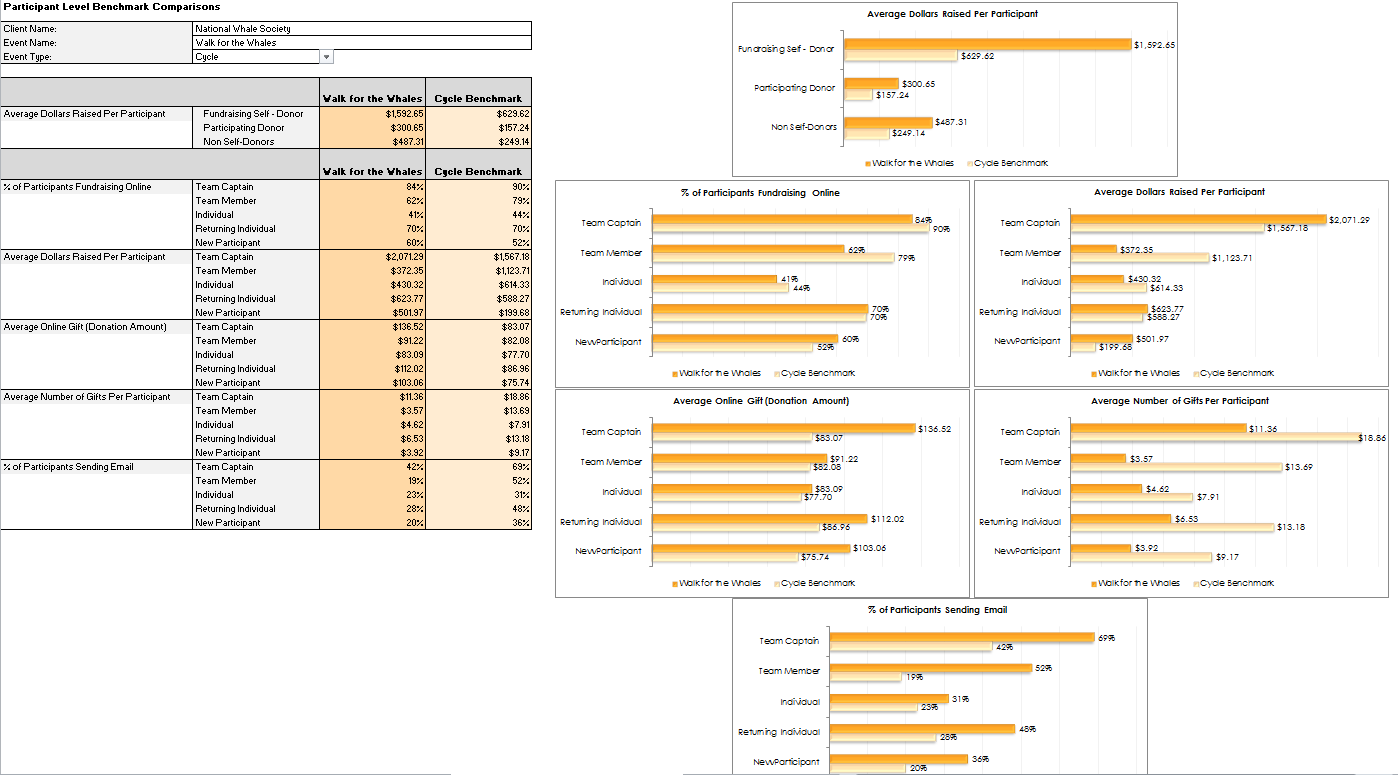
**Key Performance Indicators:**

1. **% of Participants Fundraising Online:** Total Participants with at least 1 Online Gift / Total Participants (from whatever segment is being measured)
   1. **Sort by Online Gifts and sum total**
   2. Populate Peer-to-Peer Excel Workbook **Client Data – Participant Level** tab with totals
2. **Average Dollars Raised Per Participant:** Total All Confirmed Gifts ($)/Total Sum of Segment
   1. Sum Total All Confirmed Gifts
   2. Sum Total of segment being measured
   3. Populate Peer-to-Peer Excel Workbook **Client Data – Participant Level** tab with totals
3. **Average Online Gift:** Total All Online Gifts ($)/ Online Gifts
   1. Sum Total All Online Gifts ($)
   2. Sum Total Online Gifts
   3. Populate Peer-to-Peer Excel Workbook **Client Data – Participant Level** tab with totals
4. **Average Number of Gifts Per Participant:** Total All Gifts/ Total Sum of segment
   1. Sum Total All Gifts
   2. Sum Total of segment being measured
   3. Populate Peer-to-Peer Excel Workbook **Client Data – Participant Level** tab with totals
5. **% of Participants Sending Email:** Total with at least 1 email sent/ Total Sum of Segment
   1. Sum Total of participants with at least 1 email sent
   2. Sum Total of segment being measured
   3. Populate Peer-to-Peer Excel Workbook **Client Data – Participant Level** tab with totals

Your Event-Level Data input worksheet will look like this:



The next tab is the Participant Benchmark Comparison tab which will be automatically updated with your calculated performance indicators compared to benchmark data:



The tables in the excel workbook are to provide an easy-to-read visual comparison of your organization’s data vs. the benchmark data. These tables can be easily pasted into emails, Word documents or Power Point presentations.

For additional guidance on ideas on how to interpret your data once you’ve created your dashboard, please reference the 2013 Peer-to-Peer Benchmark report. You can also visit our Luminate Customer Center at <http://customer.convio.com>.