



## **Federation Benchmarking Project: Lessons Learned from Pilot Study of Small / Intermediate Federations - 2009**

### **Background:**

- Pilot study; 12 federations provided self-reported data for 2005-2008 period
- Worked with Measuring Success to test hypotheses and associations found in prior analyses of large / large-intermediate federation data
- Results provide both management insights and benchmarks for performance

### **Key Findings:**

1. Professional cultivation matters. More frequent visits by federation professionals with top donors are associated with larger gift increases.
2. However, professional solicitation of top donors did not have same impact as in L/LI federations and was not associated with larger gift increases.
3. On average, top donors whose spouses are federation volunteers – either at programs or in campaign – make larger gift increases than those whose spouses are not. (Association was not significant in large/large-intermediate federations.)
4. Top donors (at all size federations) are restricting more of their annual campaign gifts, but this trend does not appear to have a negative impact on unrestricted gift increases.
5. The association seen in the large / large-intermediate federations between growth in their board campaign gifts and growth in their overall campaigns did not hold in the small / intermediate pilot study.



6. Federation Executive Committee members may serve as role models for the community when it comes to endowment, as Executive Committee PG&E participation is positively associated with community-wide PG&E levels.
7. Multiple factors impact the percent of agency boards making gifts to a federation's annual campaign, including: the proportion of total agency fundraising that is attributable to the federation, the average size of agency executives' gifts to federation, and the perceived health and community relationships of the agencies.
8. Larger average agency board gifts and larger agency exec gifts are both associated with increased agency board giving to federation and higher average campaign gift size.
9. There is significant variation across federations (in all city-size groups) in how senior managers as a group and executive directors as individuals spend their time. For the large / large-intermediate federations, more time outside of day-to-day operations is associated with several positive fundraising outcomes.
10. Despite fundamental differences in scope of operations, the average distribution of expenses by major category (e.g., campaign, planned giving, planning & allocations, fiscal management/IT) is generally consistent across city-size groups.

For more information, please contact:

- Andy Paller, FBP project manager  
[andrew.paller@JewishFederations.org](mailto:andrew.paller@JewishFederations.org)  
(860) 216-2201
- Judy Horowitz  
[judy.horowitz@JewishFederations.org](mailto:judy.horowitz@JewishFederations.org)  
(678) 222-3726
- Sue Worrel  
[Sue.worrel@jewishcharlotte.org](mailto:Sue.worrel@jewishcharlotte.org)  
(704) 944-6779