Metrics in Ministry & Development

- Metrics are:
  - Driven by Vision
  - Guided by Values
  - Achieved by being S.M.A.R.T.
    - Specific, Measurable, Attainable, Relevant, Timely
  - Evaluated by K.P.I.'s
    - Key Performance Indicators

Metrics Support a Vision!

- A Vision Statement Must Be:

  - Inspiring

  - Answers, "Where do you want to go?"

  - Brief

  To invite the USC Community into a transforming relationship with Christ and one another, empowered to make a lasting impact on the world.

Metrics are led by: Organizational Values

- ▶ A Value Statement Answers:

  - ▶ Who are you as an organization?

  - ▶ What does your organization value?

  - ▶ What do you hope to achieve as an organization?

▶ USC Values Statement

   ▶ We joyfully place Jesus Christ at the center of our lives.

   ▶ We value authentic relationships that lead us to a deeper love of Christ.

   ▶ We live lives rooted in prayer, guided by Scripture and engaged in the Sacramental life of the Church.

   ▶ Inspired by the Holy Spirit, we serve those in need throughout the world.

Metrics are: S.M.A.R.T.

- S.M.A.R.T. Goals are:
  - Specific
  - Measurable
  - Attainable
  - Relevant
  - Timely

- SMART Goal Examples (Ministry)

  - To grow retreat participants by 10% by May 2018.

  - Each campus minister journey with 3 students this year and lead at least one small group.

  - Increase student participation in Alternative Spring Break from 30 to 40 (30%+) by May 2018.

  - Implement music for daily mass at 5:30pm.

  - Identify at least two organizations on campus that we have not partnered with at USC.

- SMART Goal Examples (Fundraising)

  - FY18 Secure $2 million for Operations

  - Visits: 144 face to face visits

  - Proposals: 36 proposals presented of >$5,000

  - Monthly donors: 40 new monthly donors

  - New donors (one of the following):

    - 25 new donors of $5,000 or more

    - 15 new donors of $10,000 or more

    - 6 new donors of $50,000 or more

- SMART Goal Examples (Marketing)
  - Website traffic increase by 20% May 2018
  - Gain 300 more followers on FB, 200+ IG, 100 on Twitter.
  - Increase social media engagement by 25% per post.
  - Gain 30 5-Star Reviews on FB or Google by May 2018
  - Achieve 20 mentions on FB, Google or Press by May 2018
  - Achieve average of 38% open rate of emails

► **Write one S.M.A.R.T. Goal now in 3 minutes**

S.M.A.R.T. Goals

Strategic — What goal are you trying to accomplish and why?

Measureable — How will you know you've achieved your goal? What is your intended outcome?

Attainable — What actions will you put in place to ensure you achieve this goal?

Relevant — How does this goal align with your role as an educator?

Time-bound — What is the timeline for achieving this goal?

Metrics are evaluated by KPI:

Key Performance Indicators

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- K.P.I.'s help you:
  - Gauge your work
  - Better articulate success to donors
  - Build a strategic vision
  - Strengthen unity among your team

- ▶ Examples for KPI's to track
  - ▶ Financial Health:
    - ▶ Days/months cash on hand (3 months)
    - ▶ Reserve fund/endowment in place ($10M)
    - ▶ Budget in place - with surplus ($100K)
    - ▶ Software in place to handle transactions (RE & QB)
    - ▶ Point person to oversee finances (Bus. Manager)

- Examples for KPI's to track
  - Fundraising
    - New donors (468)
    - Increasing old ones (102)
    - New names added (789)
    - Number of gifts (2058)
    - Avg. Gift Size ($2,371)
    - Participation rates of board (100%)

► Examples for KPI's to track

   ► Programs

      ► Bible studies (20 for FY18)

      ► Mass attendance (Avg. 610)

      ► Sacraments received (Confirmation 30; Baptism 14)

      ► Retreat-participation (75)

      ► Spiritual directions (42)

      ► Service trips (5)

      ► Dinner attendance (168)

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► Examples for KPI's to track

  ► Human Capital

    ► Employee turnover (1-2 per year)

    ► Are reviews in place (Mid-year/Annual)

    ► Are goals being set and achieved? (Goals set)

    ► Is there money set aside for staff development? ($1K)

- Examples for KPI's to track
  - Marketing
    - Facebook goals (gain 300 new by June 2018)
    - Instagram (200) and Twitter (100) followers
    - Quality of marketing materials (Strong)
    - Estimated readership (3-4K)
    - Engagement of University Community
      - Alumni Assoc.; Latino; Asian; Advancement; Rams; Jesuits

- ► Examples for KPI's to track
    - ► Governance
        - ► Board in place (19 members)
        - ► Board roles and expectations (Job Description)
        - ► Education of Board members (Who we are)
        - ► Accountability of staff/priest to board (Evaluations)
        - ► Are you evaluating programs/your board?
        - ► Are you soliciting feedback from your constituents?
            - ► In pew 3 questions

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- ▶ KPI's Worksheets
  - ▶ Start Small (1 indicators per category)
    - ▶ Financial
    - ▶ Fundraising
    - ▶ Programs
    - ▶ Staff
    - ▶ Marketing
    - ▶ Governance
 - ▶ Fill in one per category for your team. (5 min.)

Metrics help develop:
Inputs / Outputs / Outcomes

- Inputs vs. Outputs vs. Outcomes:
  - Provide clarity
  - Help guide your cause
 - Lead to impact (why you exist = outcomes)

- Inputs

  - Inputs describe how much in the way of resources (both financial and non-financial, such as volunteer time, materials, equipment, etc.) was used to conduct an activity.
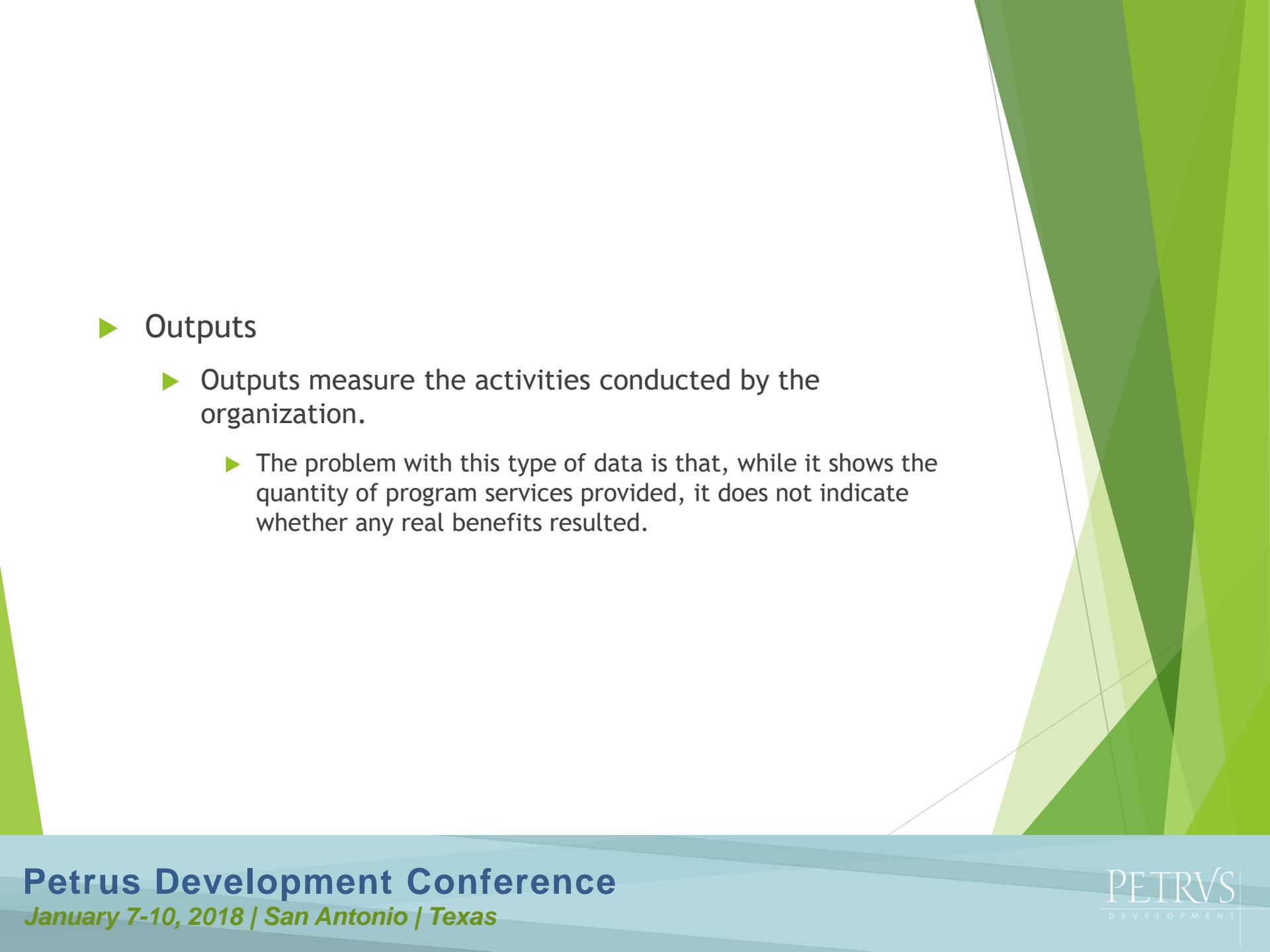
- Outputs
  - Outputs measure the activities conducted by the organization.
    - The problem with this type of data is that, while it shows the quantity of program services provided, it does not indicate whether any real benefits resulted.
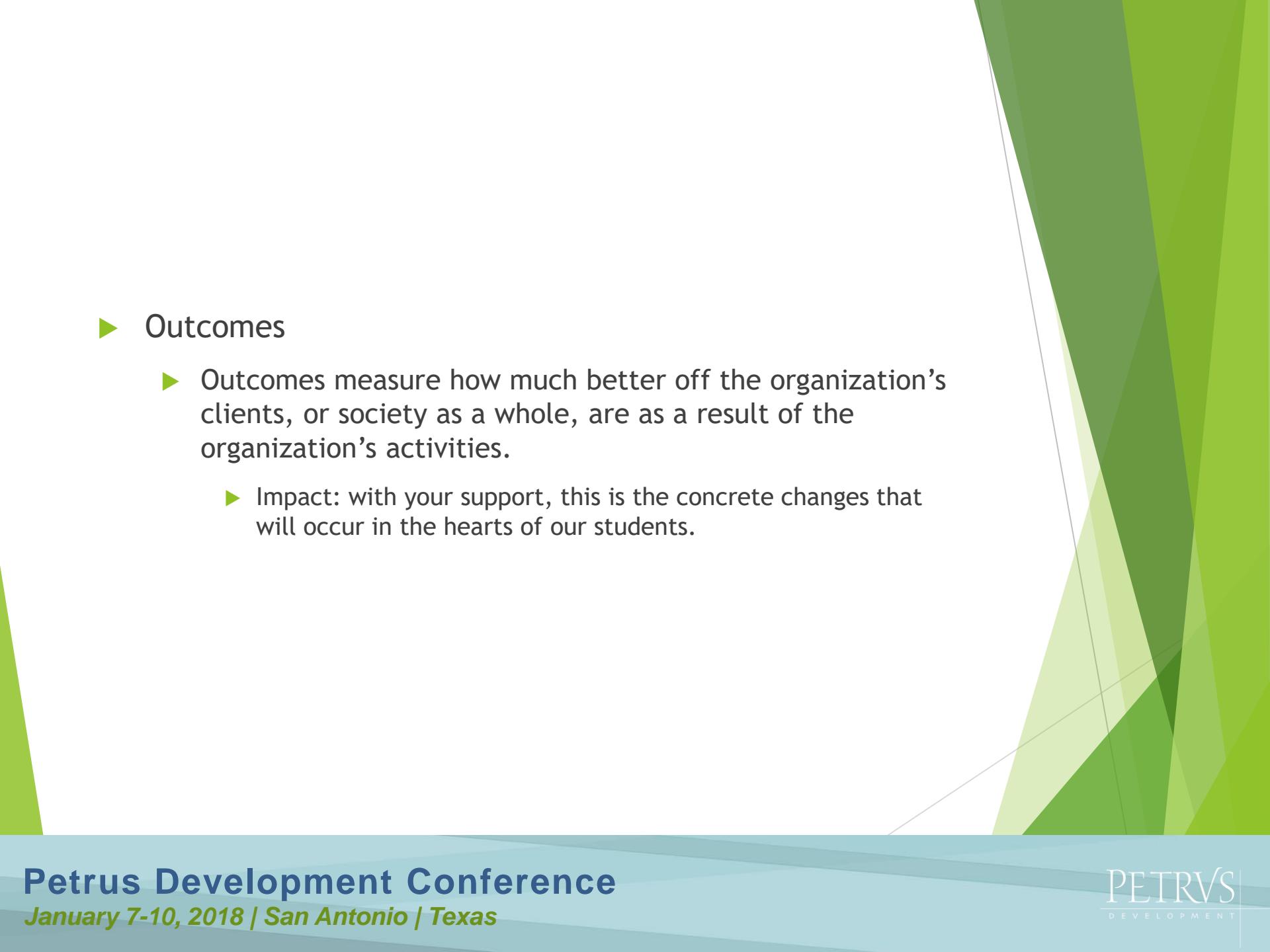
- Outcomes
  - Outcomes measure how much better off the organization's clients, or society as a whole, are as a result of the organization's activities.
    - Impact: with your support, this is the concrete changes that will occur in the hearts of our students.

- **Hilton Grant**
  - Input
    - Pilot a 2.5 year plan in Southern California that not only shares resources between schools but allows us to gather real-time data about the plausibility of a national model.

- Hilton Grant
  - Outputs
    - Single sex retreats
    - Come and see weekend
    - Spiritual direction
    - Bibles studies
    - Service opportunities
    - On campus enhancement
    - Vocations group

- Hilton Grant
  - Outcomes
    - Add two religious sisters to ministry staffs
    - Increase women's participation by at least 10%.
    - Increase the number of women who attend "come and see" weekends throughout California.
    - Partner with Sister Story on their Oral History Project that pairs students with religious women.
    - Building a sustainable model of shared resources among campuses throughout the country.

- Questions?

  "Our Ministry is trying to move away from superficial counting of numbers and toward forming deep relationships built on discipleship. How do you measure that?"