

Fundraising and Spending Effectiveness



Key Industry Benchmarks

In an effort to earn, maintain and strengthen the trust of Betas and friends across North America, the Beta Foundation monitors its fundraising and spending performance relative to these three non-profit industry benchmarks (also shown graphically on the three following pages):

Program Services Ratio

Industry Benchmark = More than 65%

The Program Services Ratio represents the percentage of each dollar **spent** by the Beta Foundation that is **spent** on the leadership development programs of the Men of Principle initiative (program expenses/total expenses). The **HIGHER** the Beta Foundation's Program Services Ratio, the better! In fiscal year 2017, the Beta Foundation's Program Services Ratio was 90.1%, which means 90.1 cents of every dollar spent by the Beta Foundation went directly to the programs that advance the Fraternity's mission of developing men of principle for a principled life.

Fundraising Efficiency Ratio

Industry Benchmark = Less than 35%

The Fundraising Efficiency Ratio represents the percentage of each dollar **received** by the Beta Foundation that is **spent** on fundraising expenses (fundraising expenses/annual support). The **LOWER** the Beta Foundation's Fundraising Efficiency Ratio, the better! In fiscal year 2017, the Beta Foundation's Fundraising Efficiency Ratio was 5.8%, which means it only cost Beta Foundation 5.8 cents to raise a dollar.

Fundraising Ratio

Industry Benchmark = Less than 35%

The Fundraising Ratio represents the percentage of each dollar **spent** by the Beta Foundation that is **spent** on fundraising expenses (fundraising expenses/total expenses). The **LOWER** the Beta Foundation's Fundraising Ratio, the better! In fiscal year 2017, the Beta Foundation's Fundraising Ratio was 6.0%, which means only 6.0 cents of every dollar spent by the Beta Foundation went to fundraising expenses.

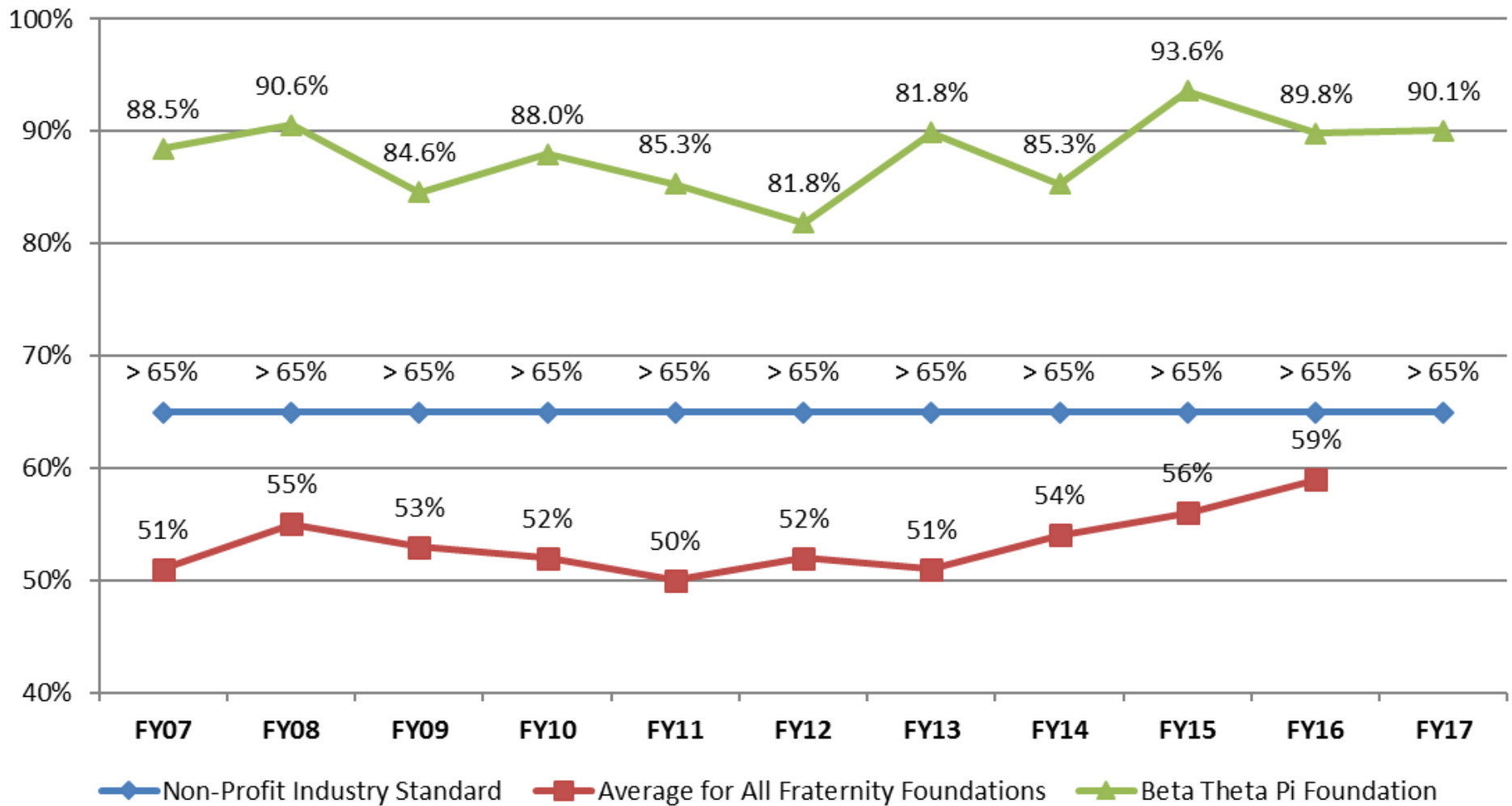
Although all three of these ratios are important to consider, most non-profit experts argue that the **Program Services Ratio is the most important** because it highlights the percentage of each dollar spent by a non-profit organization that goes directly to the programs that advance the organization's mission.

The Beta Theta Pi Foundation Board of Directors and Foundation Staff in Oxford do not take for granted the contributions given each year by generous Betas and friends across the world, and we hope these key benchmark results show our commitment to raising and spending your charitable dollars efficiently and in a manner which allows us to directly impact the development young men of principle across North America.

NOTE: The data provided in this document comes from public IRS 990 tax returns and is gathered by an independent party affiliated with the North-American Interfraternity Conference Foundation (NICF).

Program Services Ratio

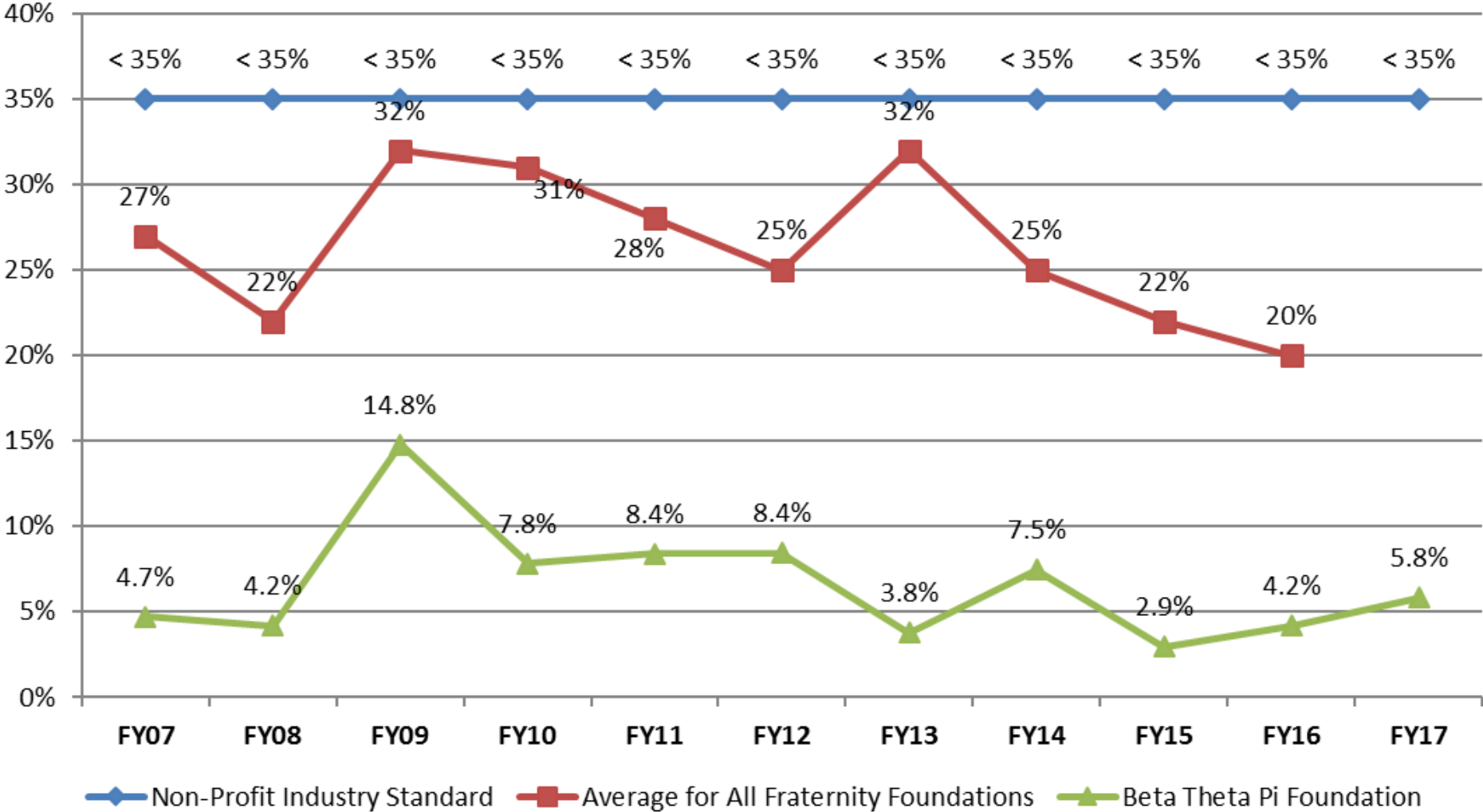
(Program Expenses/Total Expenses) ~ The **HIGHER** the Better!



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Fundraising Efficiency Ratio

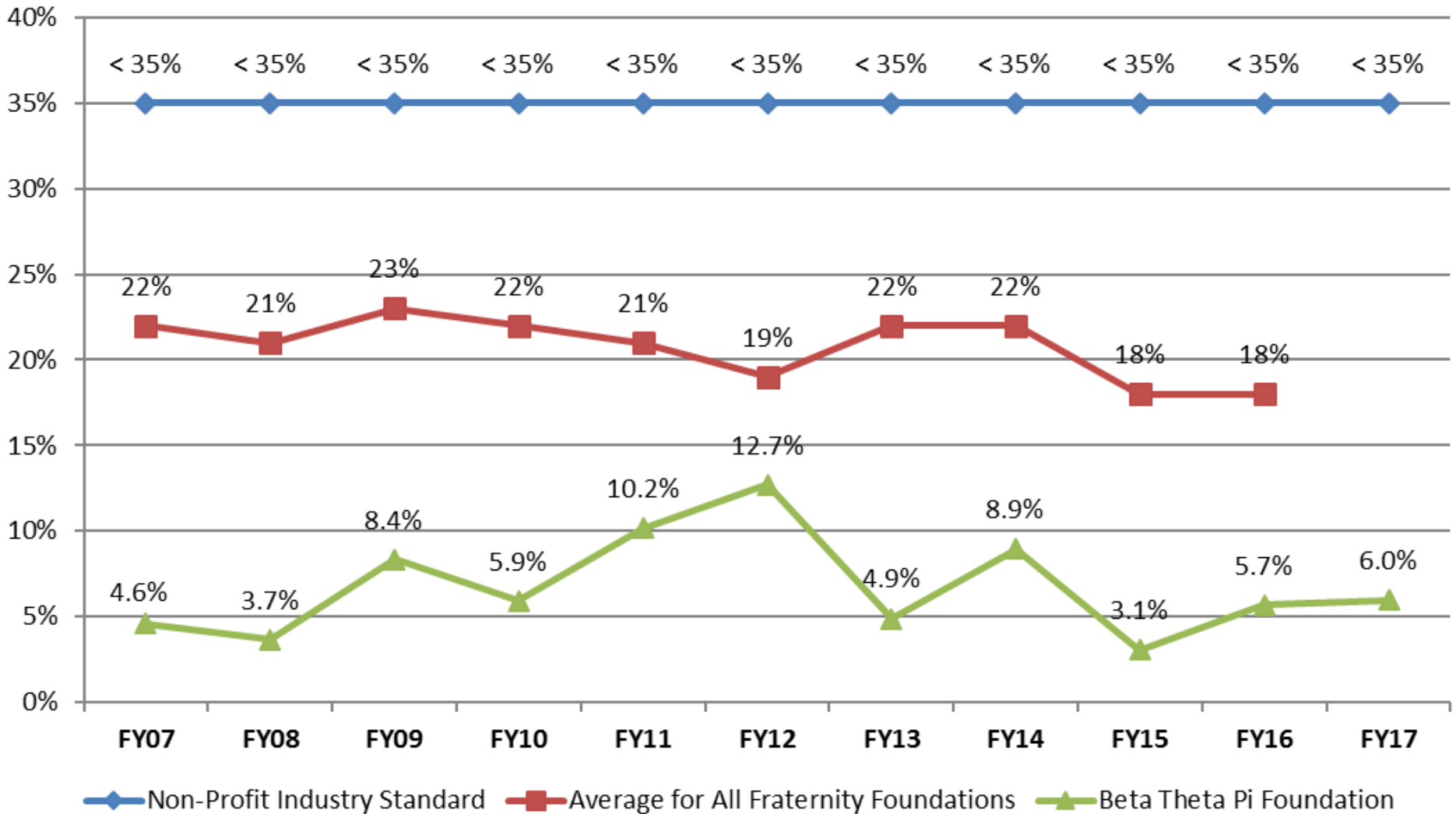
(Fundraising Expenses/Annual Support) ~ The **LOWER** the Better!



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Fundraising Ratio

(Fundraising Expenses/Total Expenses) ~ The **LOWER** the Better!



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