



## ***Donor Review Report***

Professional Version

## ***Prepared For Gryphon Sample Report***

Feb 2020

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# Included With This Report

## Included at the back of this report is a disk that contains the following:

- 1) Electronic version of this report (PDF format).
- 2) 39 action reports to assist in identifying donors (PDF format).
- 3) A Powerpoint version of the report (Powerpoint format).
- 4) Appeal summary results (PDF format).
- 5) Comma delimited text files of the results of the analysis.
- 6) Name and address utility - restores names and addresses to above tables so that you can target specific donors. (Included with Access database or Excel Spreadsheet).

It is important to note that the tables and charts in this report include every gift made to your organization regardless of size. This is important because a small number of major gifts can sometimes skew results. As a client you have chosen not to exclude major gifts of any size from this report.

### **Definition:**

**For the purposes of this report active donors are considered to be those who have given a gift in the most recent 36 months covered by this report.**

**The information in this report pertains strictly to the years reported. The first year in this report forms the baseline and all activities in the following years are in comparison to this baseline. As such, all donors in the baseline year are considered new donors and first gift dates for all donors are calculated based upon the first gift made within this report time frame.**

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## **Introduction**

There are two parts to your donor review report. The first part looks at a full ten years of donor history, so as to provide a comprehensive understanding of the long term growth patterns of your fundraising program. This can be important because short term results can fluctuate and there is a risk of losing sight of the longer term strategies that eventually lead to overall positive growth. It is normal that short term results vary and they can sometimes seem volatile but when looking at a longer term perspective it is possible to see whether your strategic directions have yielded the overall results you were planning for.

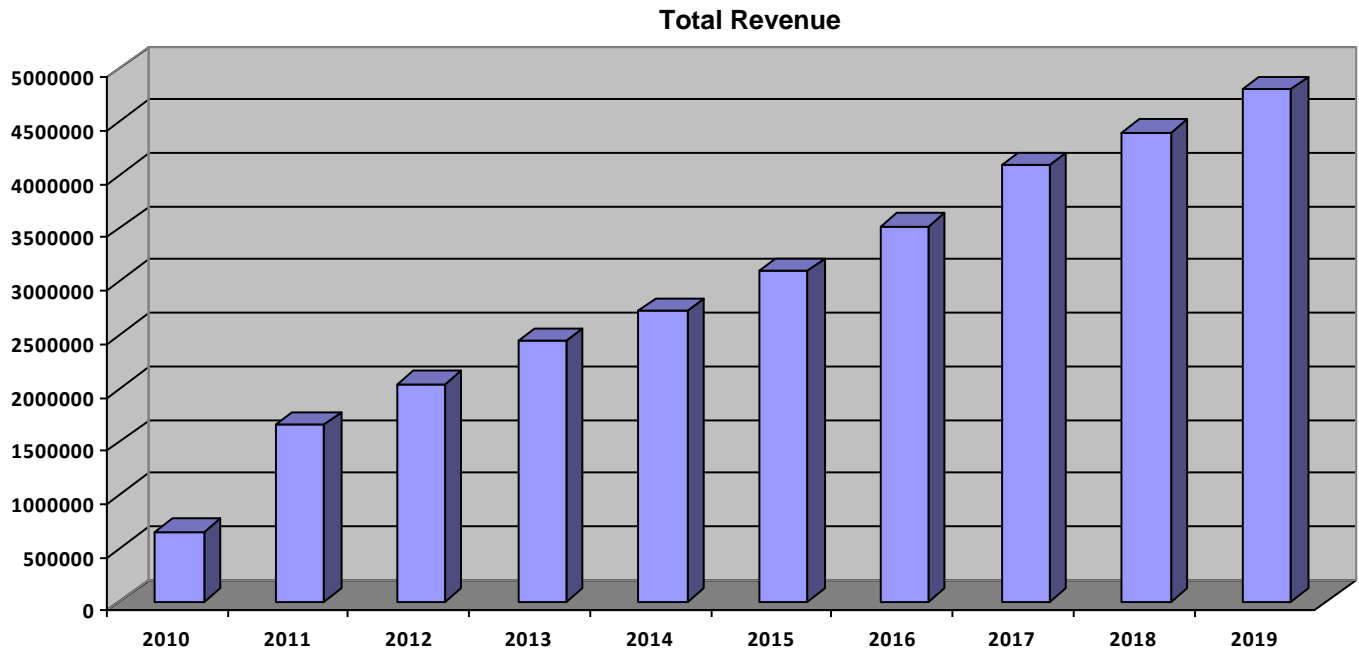
The second part of the report looks in depth at donors who have been active in the most recent thirty-six months. These are your currently active donors and a closer look at them will highlight where strengths and opportunities for improvement might lie. The action tables provided with this report are meant to allow fundraising staff to begin working immediately with these key donors instead of wasting time doing research to find out who they are.

This review is not designed to require analytical expertise to use. It is designed so that any fundraising professional can understand the results and use those results to enhance their ability to work with the key donors who have the greatest potential to make a significant impact for your programs. Each page of the review is accompanied by a page of analytical considerations that uses every day language to highlight how that information can be utilized.

Included with this review are files that will save you time when working with the results. There is a PowerPoint presentation provided for presentations to staff or Board members. There are text files containing key results that are ready to be imported into Excel. There is an Access database with these same results along with a special utility that can restore names, addresses and phone numbers to the information in the tables provided by this report. This will allow you to identify key donors and work with them in a specific way. One example of this might be top donors who are beginning to lapse. Through the information provided by this report, you can quickly identify these donors and begin the work of reconnecting with them. These same tables are also provided in PDF format in the event that you need to print the results of a specific segment of the report.

The information in this report can help you to focus your time and resources on the donors that can make the greatest impact for your organization. It is meant to be a guide that can help point you towards fundraising success.

# Executive Overview Of Giving History



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Total Revenue</b>	<b>\$657,897</b>	<b>\$1,654,391</b>	<b>\$2,043,530</b>	<b>\$2,446,586</b>	<b>\$2,718,869</b>	<b>\$3,096,191</b>	<b>\$3,521,071</b>	<b>\$4,086,133</b>	<b>\$4,400,471</b>	<b>\$4,797,118</b>
# Gifts	8,858	31,184	41,917	48,627	51,787	60,028	67,128	72,493	74,372	84,784
Gifts Per Donor	1.29	1.64	1.82	1.88	1.94	1.91	2.09	2.13	2.24	2.28
Avg Gift	\$74	\$53	\$49	\$50	\$53	\$52	\$52	\$56	\$59	\$57
Revenue Per Active Donor	\$96	\$87	\$89	\$94	\$102	\$99	\$110	\$120	\$132	\$129
Avg Long Term Donor Value	\$96	\$111	\$141	\$172	\$206	\$227	\$259	\$291	\$328	\$353
# On File	6,888	20,831	30,844	39,653	46,310	55,583	62,204	69,456	75,093	83,252
# Active This Period	6,888	19,036	23,061	25,910	26,673	31,351	32,096	34,030	33,241	37,253
% Active This Period	100	91	75	65	58	56	52	49	44	45
# Renewed	N/A	5,093	12,649	15,683	17,906	19,072	22,135	22,669	23,533	24,303
# New	N/A	13,943	10,013	8,809	6,657	9,273	6,621	7,252	5,637	8,159
# Reactivated	N/A	0	399	1,418	2,110	3,006	3,340	4,109	4,071	4,791
# Stopped Giving This Year	1,028	3,803	4,202	4,467	4,303	5,544	6,079	7,635	8,938	N/A

The summary above shows overall revenue for period covered by this report. The table also highlights the changes that have occurred in the numbers of donors that are on file, changes to those who are active and changes in the number of gifts donors gave.

In the pages that follow we will look in detail at each of these categories and outline the underlying trends that have led to the changes shown in the above table.

# Analytical Considerations

## Executive Summary

The executive summary of your giving history provides an overview of your fundraising program and allows you to map the areas where your program has grown over the last ten years. Using this you can see at a glance whether your overall fundraising progress is where you wanted it to be.

### ***Total Revenue***

We know from experience that revenues fluctuate from year to year. When revenues are up we have confidence that our fundraising strategies are performing as we hoped. When revenues are down we begin to question our fundraising strategies. Using the short term perspective that comes from viewing immediate results it becomes difficult to know whether long term fundraising strategies are in need of review or are working as intended. That is why it is important to review our results over a longer period of time. While revenues may fluctuate from year to year the key question that can be answered here is whether overall revenue has grown in the way planned for over the last ten years. If so then long term fundraising strategic plans would appear to be working in spite of any year over year fluctuations in revenue.

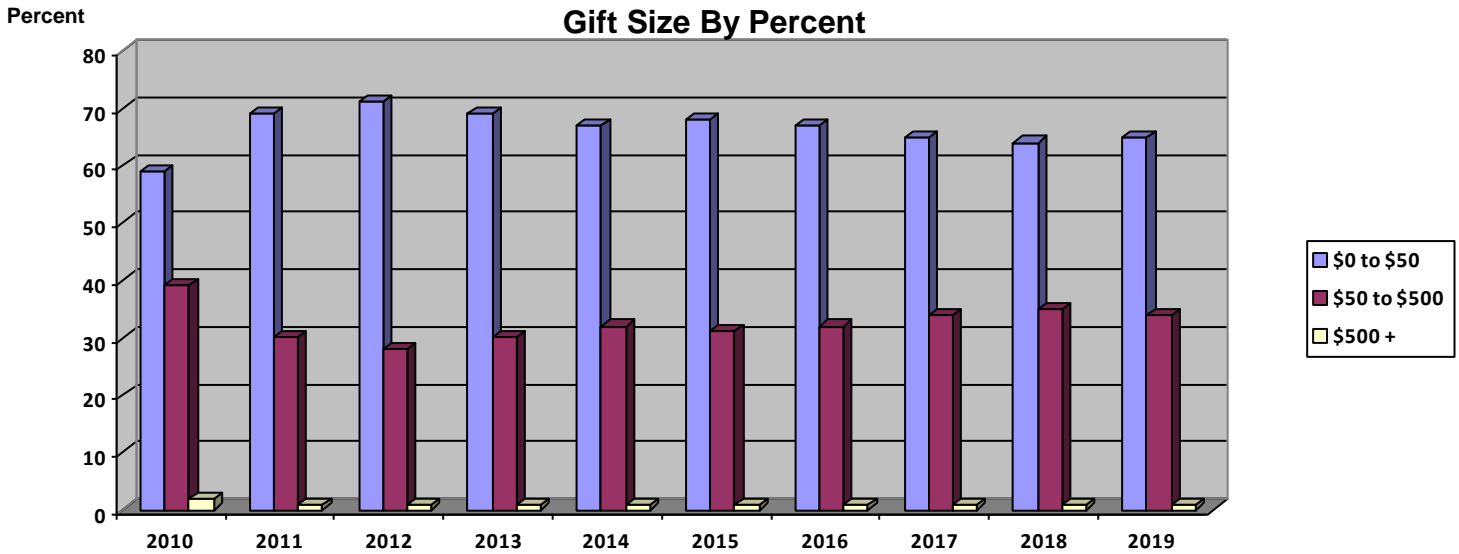
### ***Gift Activity***

Reviewing the number of gifts and tracking the averages can provide insight into important aspects of your fundraising program. If overall revenues have grown but the number of gifts has dropped, then this can indicate success in major gift cultivation but could also indicate that donor acquisition strategies are not what they need to be to maintain a healthy donor file. If revenues have grown and the number of gifts has also grown it would be important to keep an eye on the number of gifts per donor and number of donors on file. This can tell you whether the increased giving is coming from existing donors who are giving a greater number of gifts or whether it is a result of donor acquisition strategies that are successfully building your donor file.

### ***Donor File Activity***

The number of active donors can vary from year to year but it is important to see overall growth in this area over a ten year period. The number of reactivated donors and the number of new donors always needs to be larger than the number of donors who stop giving to you. This is necessary in order for your donor file to grow. While this may not happen every single year it is important to see this kind of overall growth. Without overall growth in this area it is possible that normal donor attrition will become predominant and lead to a loss of revenue. This is where donor acquisition strategies play a large role and even though acquisition of new donors can be expensive it is nevertheless needed in order to maintain and grow a healthy donor file.

# Gift Size History



## Gift Size

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
\$0 to \$9.99	73	333	640	594	632	940	1,395	1,364	1,340	1,547
\$10 to \$14.99	461	1,983	2,959	3,959	2,882	3,845	4,564	5,292	6,261	7,577
\$15 to \$24.99	2,230	10,689	13,618	13,612	14,453	17,060	17,348	17,157	15,910	19,188
\$25 to \$49.99	2,493	8,644	12,434	15,385	16,772	19,084	21,891	23,448	24,241	26,617
\$50 to \$99.99	1,649	5,145	7,012	8,638	9,691	10,891	12,442	13,908	14,448	16,208
\$100 to \$499.99	1,773	4,100	4,923	6,052	6,895	7,702	8,924	10,653	11,393	12,844
\$500 to \$999.99	117	189	233	277	302	332	363	418	496	519
\$1000 +	62	101	98	110	160	174	201	253	283	284

## Gift Size By Percent

\$0 to \$9.99	1	1	2	1	1	2	2	2	2	2
\$10 to \$14.99	5	6	7	8	6	6	7	7	8	9
\$15 to \$24.99	25	34	32	28	28	28	26	24	21	23
\$25 to \$49.99	28	28	30	32	32	32	33	32	33	31
\$50 to \$99.99	19	16	17	18	19	18	19	19	19	19
\$100 to \$499.99	20	13	12	12	13	13	13	15	15	15
\$500 to \$999.99	1	1	1	1	1	1	1	1	1	1
\$1000 +	1	0	0	0	0	0	0	0	0	0
<b>Total # Gifts</b>	<b>8,858</b>	<b>31,184</b>	<b>41,917</b>	<b>48,627</b>	<b>51,787</b>	<b>60,028</b>	<b>67,128</b>	<b>72,493</b>	<b>74,372</b>	<b>84,784</b>

The graph and table above track the change in the size of donor gifts over the years. These levels can indicate whether donor cultivation strategies are having their desired impact.

Effective donor cultivation strategies can lead to an increase in the size of donor gifts and this would tend to show up as an overall percentage increase in the larger gift categories.

# **Analytical Considerations**

## **Gift Size History**

This page gives a ten-year perspective on the size of gifts your organization is receiving. Ideally, the overall size of gifts should progress toward the higher amount categories as time progresses. In order for this to happen it would be important for an effective donor upgrading program to be in place. Such a program would monitor the gift levels of donors with a view to offering opportunities for increasing gift size.

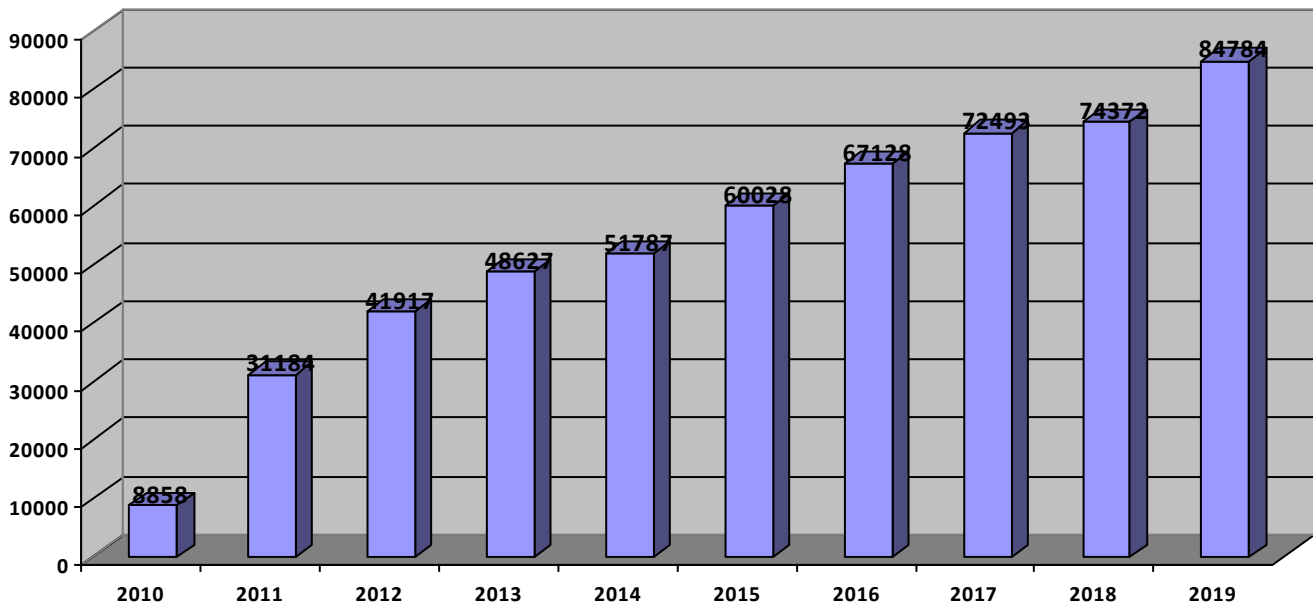
One example of this can be seen in direct mail programs that change their gift ask based upon the last gift a donor has given. If a donor's most recent gift was ten dollars then the next time an appeal is sent the suggested gift ask might start at fifteen dollars. In this way, the donor is challenged to increase their giving level.

When looking at a ten-year overview of gift size it is likely that gift levels will be seen to rise and fall year over year. But if upgrading strategies are in place and working as expected then the overall level of gifts should be rising over a ten-year span. An upward trend in the total number of gifts would also be expected if donor acquisition programs are adding new donors. This is where the page on frequency of giving and the information on gift size should be understood as being connected. Later in the report we put this information together so as to see this connection more clearly.

Those in the upper gift ranges have signaled that they have a high commitment level to your cause and are good candidates for major gift, monthly giving and legacy giving programs.

# Gift Frequency History

## Total Number Of Lifetime Gifts



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Frequency Of Gifts</b>	<b>Number Of Gifts</b>									
1	5,716	12,715	14,110	15,388	15,097	18,881	18,095	19,053	18,539	21,586
2	1,634	7,432	9,232	10,578	11,618	11,936	12,702	13,734	12,838	12,960
3 - 9	1,267	9,724	16,187	19,709	21,256	23,528	28,275	29,082	29,056	31,194
10 +	241	1,313	2,388	2,952	3,816	5,683	8,056	10,624	13,939	19,044
Total	8,858	31,184	41,917	48,627	51,787	60,028	67,128	72,493	74,372	84,784
<b>Gift Frequency By Percentage *</b>										
1	65	41	34	32	29	31	27	26	25	25
2	18	24	22	22	22	20	19	19	17	15
3 - 9	14	31	39	41	41	39	42	40	39	37
10 +	3	4	6	6	7	9	12	15	19	22
Total	100	100	100	100	100	100	100	100	100	100

The graph shows the total number of gifts given by donors over the period covered by this report. The categories in the table that might be of most interest are highlighted and are those showing lifetime gifts of three or more. These would be counted as some of your most loyal donors.

In the pages that follow we will look closely at these donors by comparing the number of gifts they gave to how frequently these gifts were given and what the monetary value of these gifts were.

# **Analytical Considerations**

## **Gift Frequency History**

This page highlights the giving frequency of your donors over the last ten years. Gift frequency can be a good indicator of donor interest and commitment to your cause. It is important to note that this page shows only gift frequency and not necessarily how long a donor has been giving to your organization. We combine this information later in the report but for the moment we view gift frequency in isolation so we can begin to identify donors who express their significant interest in your organization through multiple gifts.

The area highlighted in yellow helps you to target donors who have shown both interest and willingness in supporting your cause in a way that makes them excellent candidates for your monthly donor program. Donors who have given three or more gifts during the course of a year can also be excellent candidates for legacy giving and major gift programs.

Looking at gift frequency by percentage can also be an indicator of how well donor cultivation strategies are working over the long term. If these strategies are working well then you would expect to see the percentage of donors giving multiple gifts rise over time. The ideal would be to see the percentages change through the ten year period so that those in the three to nine and ten plus categories form the majority of those who are giving.

## New Donor Acquisition And Retention

### Number Of New Donors Who Continue To Give

Year** Acquired	Number Acquired	Gave In Year 2	Gave In Year 3	Gave In Year 4	Gave In Year 5	Gave In Year 6	Gave In Year 7	Gave In Year 8	Gave In Year 9	Gave In Year 10
2010	6888	5093	4488	4096	3771	3618	3417	3215	2949	2757
2011	13943	8560	7288	6417	6099	5672	5382	4903	4773	
2012	10013	5717	4990	4573	4309	4025	3624	3482		
2013	8809	4838	4265	3971	3626	3321	3213			
2014	6657	3523	3138	2922	2554	2456				
2015	9273	4968	4270	3846	3626					
2016	6621	3338	2849	2652						
2017	7252	3558	3220							
2018	5637	2915								
2019	8159									

### Percentage Of New Donors Who Continue To Give

Year** Acquired	Number Acquired	Gave In Year 2	Gave In Year 3	Gave In Year 4	Gave In Year 5	Gave In Year 6	Gave In Year 7	Gave In Year 8	Gave In Year 9	Gave In Year 10
2010	6888	73.9	65.2	59.5	54.7	52.5	49.6	46.7	42.8	40.0
2011	13943	61.4	52.3	46.0	43.7	40.7	38.6	35.2	34.2	
2012	10013	57.1	49.8	45.7	43.0	40.2	36.2	34.8		
2013	8809	54.9	48.4	45.1	41.2	37.7	36.5			
2014	6657	52.9	47.1	43.9	38.4	36.9				
2015	9273	53.6	46.0	41.5	39.1					
2016	6621	50.4	43.0	40.1						
2017	7252	49.1	44.4							
2018	5637	51.7								
2019	8159									

The above tables track the performance of new donors acquired throughout the years. Each year displayed in the table shows the total number of new donors acquired in that year. Columns to the right show how many of those new donors continued to give in each subsequent year.

It is important to note that the number displayed in each row is a reflection of how many donors in that group gave in each of those subsequent years. It is not necessarily a reflection of donors who have completely stopped giving to your cause (known as donor attrition). Donors will sometimes skip one or more years when giving gifts and as such the numbers in each row are not necessarily an accurate indicator of donor attrition. Donor attrition tables are presented later in this report.

Strong donor cultivation strategies can help to increase the number of donors that continue to give each year after an initial new donor acquisition gift.

## **Analytical Considerations**

### **New Donor Acquisition And Retention**

The information on this page tracks the performance of new donors that have been acquired throughout the years. Each year displayed in the table shows the total number of new donors acquired in that year and how many of that group were active in subsequent years.

It is important to remember that donors will sometimes skip one or more years when giving gifts. For this reason, the numbers and percentages in each column do not reflect donor attrition (this we will address later in the report).

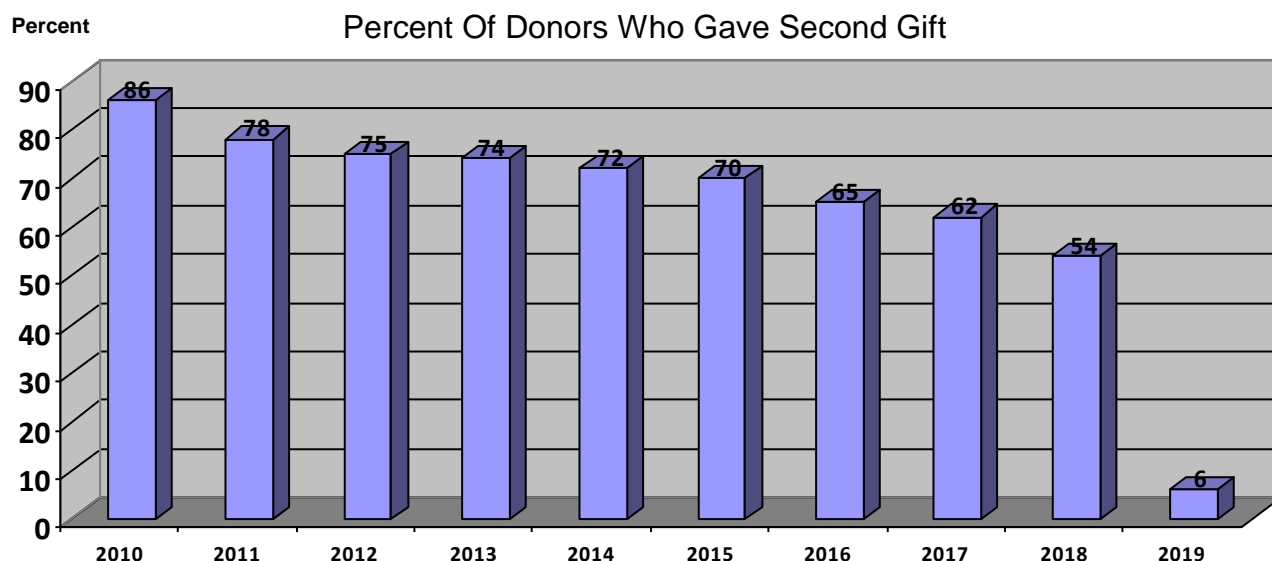
Some industry research has suggested that up to fifty percent of donors acquired in any given year will not give another gift. In percentage terms, it is not unusual to see this kind of drop in support from the first to the second year. Ideally those who give in the first year would be targeted with second gift conversion strategies so as to maximize the number of donors who will continue to give. Research in the industry suggests that obtaining a second gift from a donor greatly increases the chances that the donor will remain loyal and committed to your cause for a sustained period of time.

Strong second gift conversion strategies should begin to show up in higher donor retention rates as the year's progress. Some of these strategies might include a personal phone call thanking new donors for their interest or sending a personal note from an Executive staff member.

Donor acquisition can be expensive and as a result acquisition programs can sometimes suffer from underfunding. Without a healthy donor acquisition program, it is likely that normal donor attrition will begin to reduce the number of active donors on your file. This in turn can lead to lower revenues. Without care this can quickly become a downward spiral as lower revenues can lead to further cost cutting of expensive acquisition programs.

A well funded donor acquisition program coupled with a strong second gift conversion strategy and proper donor stewardship can lead to a very healthy long term donor retention rate.

## Second Gift Conversion History



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Acquired This Period	6,888	13,943	10,013	8,809	6,657	9,273	6,621	7,252	5,637	8,159
Gave Second Gift	5,894	10,893	7,528	6,503	4,761	6,485	4,321	4,493	3,033	470
Percent Who Gave Second Gift	86	78	75	74	72	70	65	62	54	6
Revenue	\$573,850	\$725,586	\$406,459	\$364,004	\$275,626	\$337,061	\$243,871	\$311,239	\$231,451	\$71,203
# Gifts	7,856	16,050	9,772	8,073	5,966	7,749	5,274	5,731	3,747	1,234
Avg # Gifts	1.33	1.47	1.30	1.24	1.25	1.19	1.22	1.28	1.24	2.63
Avg Gift Amt	\$73	\$45	\$42	\$45	\$46	\$43	\$46	\$54	\$62	\$58
Avg Revenue Per Donor	\$97	\$67	\$54	\$56	\$58	\$52	\$56	\$69	\$76	\$151

The graph and table above show the number of new donors who gave a second gift at some point during the time period covered by this report. The table shows how many of the newly acquired donors in each year eventually gave a second gift regardless of what year that gift was given.

It is not unusual to find that the percentage of new donors who give a second gift is slightly higher in past years. This reflects the fact that with the passage of time newly acquired donors sometimes give a second gift even though that gift may not be received for two or more years.

Obtaining a second gift from newly acquired donors usually increases the chances that these donors will continue to give to your cause over time. Effective and timely donor cultivation strategies can increase the possibility of securing long term relationships with newly acquired donors.

## **Analytical Considerations**

### **Second Gift Conversion History**

The table on this page shows the number of new donors who gave a second gift at some point during the time period covered by this report. It is sometimes the case that acquiring a second gift from a donor takes years. For this reason, it is not unusual to find that the percentage of new donors giving a second gift will be larger in the first five years of the report, with percentages becoming lower in more recent years. The longer the amount of time, the more chance there is that a donor will at some point make a second gift, especially if your organization has an active second gift conversion program in place.

As previously mentioned, obtaining a second gift from a new donor greatly increases the chances that the donor will remain committed and loyal to your cause. Ideally, over time, a strong second gift conversion program could potentially obtain a 50 percent success rate.

Second gift conversion programs can be a natural extension of any donor stewardship strategies you employ. These programs, when strategically employed, can help to minimize the expense of donor acquisition and ensure that long term donor relationships are established with your organization.

If you note that second gift conversion rates do not rise with the passage of time it would be important to review your cultivation and stewardship programs. Those who never give a second gift become lost opportunities for your organization to increase donor retention rates and offset the expenses related to costly donor acquisition.

## New Donor Second Gift Conversion

When New Donors Gave A Second Gift											
Year** Acquired	Number Acquired	Gave 2nd Gift In 2010	Gave 2nd Gift In 2011	Gave 2nd Gift In 2012	Gave 2nd Gift In 2013	Gave 2nd Gift In 2014	Gave 2nd Gift In 2015	Gave 2nd Gift In 2016	Gave 2nd Gift In 2017	Gave 2nd Gift In 2018	Gave 2nd Gift In 2019
2010	6888	937	4232	370	115	55	66	41	38	26	14
2011	13943		3064	6072	829	215	254	181	138	71	69
2012	10013			1306	4704	770	293	156	133	84	82
2013	8809				902	4151	727	336	190	99	98
2014	6657					767	2938	564	313	98	81
2015	9273						814	4337	845	332	157
2016	6621							604	2898	561	258
2017	7252								838	2972	683
2018	5637									445	2588
2019	8159										470

Percentage Of New Donors Who Gave Second Gift											
Year** Acquired	Number Acquired	Gave 2nd Gift In 2010	Gave 2nd Gift In 2011	Gave 2nd Gift In 2012	Gave 2nd Gift In 2013	Gave 2nd Gift In 2014	Gave 2nd Gift In 2015	Gave 2nd Gift In 2016	Gave 2nd Gift In 2017	Gave 2nd Gift In 2018	Gave 2nd Gift In 2019
2010	6888	13.6	61.4	5.4	1.7	0.8	1.0	0.6	0.6	0.4	0.2
2011	13943		22.0	43.5	5.9	1.5	1.8	1.3	1.0	0.5	0.5
2012	10013			13.0	47.0	7.7	2.9	1.6	1.3	0.8	0.8
2013	8809				10.2	47.1	8.3	3.8	2.2	1.1	1.1
2014	6657					11.5	44.1	8.5	4.7	1.5	1.2
2015	9273						8.8	46.8	9.1	3.6	1.7
2016	6621							9.1	43.8	8.5	3.9
2017	7252								11.6	41.0	9.4
2018	5637									7.9	45.9
2019	8159										5.8

The above table tracks when your new donors gave their second gift. Obtaining a second gift from newly acquired donors usually increases the chances that these donors will continue to give to your cause over time. Depending on the number and type of donor appeals you make in any given year, it is not unusual to find that obtaining a second gift may take many months.

Inviting donors to make a second gift as soon as is appropriate after their initial gift can many times increase your chances of securing their involvement in your cause.

Donor acquisition can be very costly and as a result timely contact with new donors who have made an expression of interest in your cause can be very important. Effective and timely new donor cultivation strategies can increase the possibility of securing long term relationships with these newly acquired donors.

## **Analytical Considerations**

### **When New Donors Gave A Second Gift**

The table on this page shows when donors gave their second gift. It is not unusual to find that the majority of donors give their second gift in the year immediately following the year they were acquired. It is significant to note that there are some donors who will not give a second gift for many years. While making up a small percentage, those who give in later years serve to remind us of the importance of perseverance when engaging in our second gift conversion strategies.

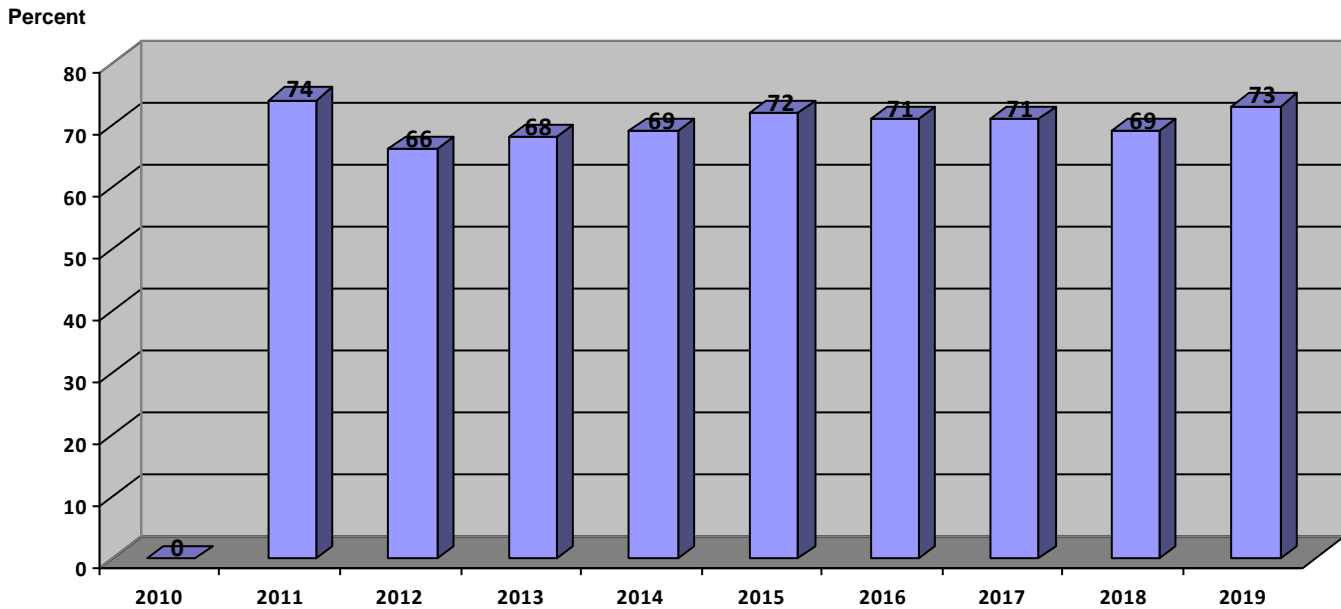
Industry wisdom reminds us of the importance of attempting to obtain a second gift as soon as it is appropriate to make this appeal. As previously mentioned, the importance of obtaining a second gift cannot be understated as it greatly increases the chances of developing a long-term donor relationship that can last for many years.

The table on this page can help to guide investment decisions surrounding acquisition and stewardship strategies by showing that securing a long-term relationship with a donor is a process that can sometimes span more than a single year. The resulting revenue benefit from establishing that long-term relationship is one that requires patience and an investment in time.

The resulting financial benefits of this investment can be witnessed when viewing long term donor value (page 28 of this report). Using these same groups of newly acquired donors the long-term donor value report shows the total amount of revenue these donors contributed to your organization throughout the years. By far, the greatest part of this revenue comes from those donors your organization successfully obtained a second gift from.

# Donor Renewal Rates

Percent Of Donors Who Renew From One Year To The Next



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
# Active This Period	6,888	19,036	23,061	25,910	26,673	31,351	32,096	34,030	33,241	37,253
Renewed From Previous Year	0	5,093	12,649	15,683	17,906	19,072	22,135	22,669	23,533	24,303
Percent Renewed Previous Year	0	74	66	68	69	72	71	71	69	73
Revenue	\$657,897	\$768,905	\$1,467,969	\$1,845,671	\$2,165,748	\$2,391,676	\$2,923,434	\$3,272,754	\$3,636,516	\$3,868,944
# Gifts	8,858	12,058	29,107	36,142	41,083	45,599	55,056	58,294	62,643	69,396
Avg # Gifts	1.29	2.37	2.30	2.30	2.29	2.39	2.49	2.57	2.66	2.86
Avg Gift Amt	\$74	\$64	\$50	\$51	\$53	\$52	\$53	\$56	\$58	\$56
Avg Revenue Per Donor	\$96	\$151	\$116	\$118	\$121	\$125	\$132	\$144	\$155	\$159

The graph and table above show the number of donors who continued to give from one year to the next (known as donor renewal).

Higher percentages of donors who renew their support is an indicator that your organization has effectively won the long term loyalty of the donors who support you. In the case of lower percentages you may wish to review donor cultivation and stewardship strategies with a view to increasing donor loyalty to your cause.

# **Analytical Considerations**

## **Donor Renewal Rates**

This page shows how many donors renew their support from year to year. Ideally there would be a high percentage of donors who renew their support from one year to the next. A good target percentage could range from seventy to seventy-five percent who renew year over year.

Renewal rates can be a good indicator of how well donor cultivation strategies are working. Donor renewal rates that are low or that decrease over time can suggest that donors do not have an interest in your organization strong enough to sustain their support over the long term.

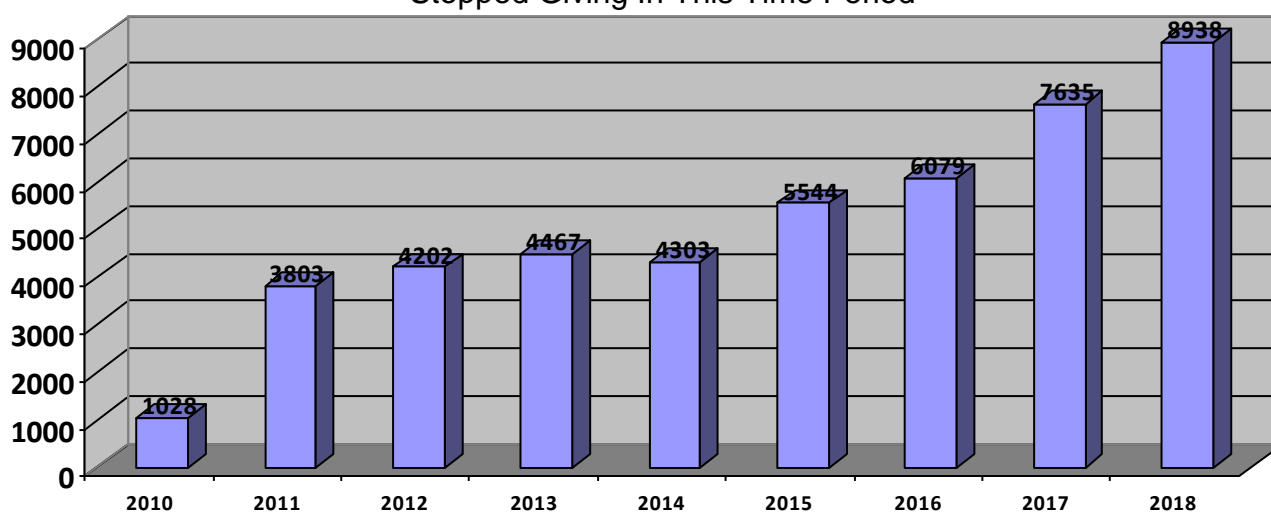
Some organizations have circumstances that could easily explain low donor renewal rates. One example might be a private school whose primary donors are parents. So long as the children of those parents attend they remain donors but when the children graduate the parents might no longer feel the need to support the school. When looking at donor renewal rates it will be important to keep in mind any natural cycle in your organization that might affect these rates.

With this in mind it is important to remember that good donor cultivation strategies can lead to strong donor renewal rates. Good stewardship of donors leads to increased loyalty to your cause and this is usually reflected in healthy donor renewal rates for your organization. When coupled with a strong donor acquisition program it is possible to see both the number of active donors and the number of renewing donors grow from year to year.

It is also worth noting the average number of gifts and average gift amount. When strong stewardship strategies are employed it is possible to see both these averages rise over time. If donor renewal rates are strong but average number of gifts and average amount of gift do not rise then it is possible that donors are not being challenged through upgrading strategies to increase their commitment to your cause.

# Donor Attrition

Stopped Giving In This Time Period



## Donor Attrition Rates

	2010	2011	2012	2013	2014	2015	2016	2017	2018
Active This Period	6,888	19,036	23,061	25,910	26,673	31,351	32,096	34,030	33,241
Acquired This Period	6,888	13,943	10,013	8,809	6,657	9,273	6,621	7,252	5,637
# Stopped Giving	1,028	3,803	4,202	4,467	4,303	5,544	6,079	7,635	8,938
Percent Of Active File	14.9	20.0	18.2	17.2	16.1	17.7	18.9	22.4	26.9
Gave 1 Gift	994	3,050	2,485	2,306	1,896	2,788	2,300	2,759	2,604
Percent Of Active File	14.4	16.0	10.8	8.9	7.1	8.9	7.2	8.1	7.8
Gave 2+ Gifts	34	753	1,717	2,161	2,407	2,756	3,779	4,876	6,334
Percent Of Active File	0.5	4.0	7.4	8.3	9.0	8.8	11.8	14.3	19.1
Net New Donors	5,860	10,140	5,811	4,342	2,354	3,729	542	-383	-3,301
Revenue In Last Year Of Giving	\$99,265	\$238,118	\$255,053	\$310,808	\$324,642	\$378,333	\$411,609	\$609,756	\$827,657
# Gifts In Last Year	1,077	4,481	5,147	6,109	5,649	6,810	7,847	9,936	11,783
Avg # Gifts In Last Year	1.05	1.18	1.22	1.37	1.31	1.23	1.29	1.30	1.32
Avg Gift Amt In Last Year	\$92	\$53	\$50	\$51	\$57	\$56	\$52	\$61	\$70
Avg Revenue Per Donor In Last Year	\$97	\$63	\$61	\$70	\$75	\$68	\$68	\$80	\$93

Donor attrition is a normal occurrence but strong donor cultivation techniques can minimize attrition rates. It is important to consider a strong donor acquisition program in order to offset the number of donors lost through attrition.

# Analytical Considerations

## Donor Attrition

This page shows how many donors were active, how many were acquired and how many stopped giving to your organization throughout the years. Donor attrition is a normal occurrence and while good donor stewardship strategies can minimize attrition there will always be a certain number of donors who stop giving in any given year.

The reasons for attrition can include such things as a change in employment status, difficult economic times, donor fatigue etc. While every effort can be made to re-engage donors who lapse, it is realistic to expect that every year a certain portion of your donor file will become inactive.

It is extremely important to ensure that new donor acquisition and donor reactivation strategies counteract this normal attrition, otherwise the file growth of your organization could be in jeopardy. Ideally the number of donors lost to attrition should be less than those acquired and/or those who have been reactivated.

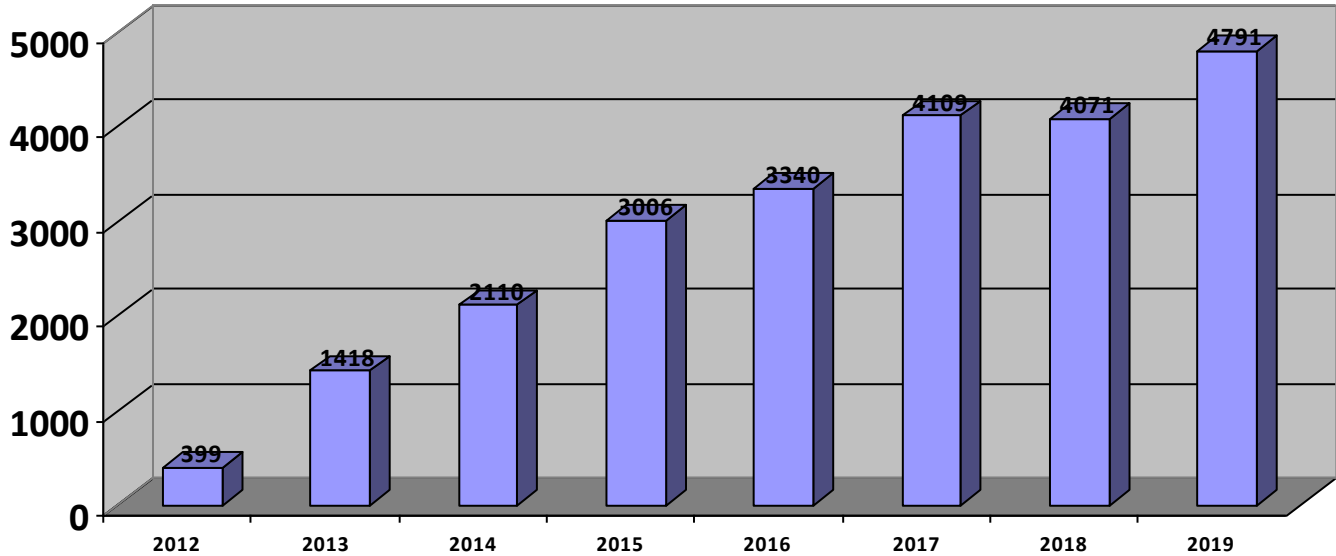
The number of "net new donors" in the table shows whether your organization has been successful in maintaining and growing your donor file. It should be noted that the number of lapsed donors in the most recent two years can change significantly over time, as these include currently active donors who are likely to give again if they are given the appropriate opportunity.

The table also shows the difference between lapsed donors who gave one gift and lapsed donors who gave two or more gifts. As we have seen in the preceding pages those who have given two or more gifts have shown themselves to be committed to the work of your organization and it is worth exploring who these donors are to see if reactivation is a possibility.

The line showing the "revenue in last year of giving" demonstrates the financial loss to your organization of lapsed donors and illustrates clearly that strategies to minimize donor attrition are a worthwhile investment.

# Donor Reactivation Report

## Existing Donors Who Gave In The Current Year But Not the Previous Year



	2012	2013	2014	2015	2016	2017	2018	2019
<b># Reactivated</b>	<b>399</b>	<b>1,418</b>	<b>2,110</b>	<b>3,006</b>	<b>3,340</b>	<b>4,109</b>	<b>4,071</b>	<b>4,791</b>
Active Donors This Period	23,061	25,910	26,673	31,351	32,096	34,030	33,241	37,253
Reactivated As Percent Of Active Donors	1.73	5.47	7.91	9.59	10.41	12.07	12.25	12.86
Revenue From Reactivated Donors	\$45,168	\$114,307	\$157,087	\$227,021	\$226,166	\$333,633	\$330,418	\$390,388
# Gifts	537	1,919	2,783	3,871	4,474	5,689	5,367	6,446
Avg # Gifts	1.35	1.35	1.32	1.29	1.34	1.38	1.32	1.35
Avg Gift Amt	\$84	\$60	\$56	\$59	\$51	\$59	\$62	\$61
Avg Revenue Per Donor	\$113	\$81	\$74	\$76	\$68	\$81	\$81	\$81

The table above can be an indicator of how well cultivation strategies might be working. Each column in the table above shows the number of donors who gave in that year but did not give in the previous year. While it is true that some donors give infrequently, this table can also indicate how successful your organization has been at re-engaging donors after they have stopped giving for a year or more.

You will note that the first two years of the time period covered by this report are not displayed. This is because the calculations for each year in this table require data from a minimum of two preceding years. As a result there is insufficient data to make calculations for the first two years of this report.

## **Analytical Considerations**

### **Donor Reactivation**

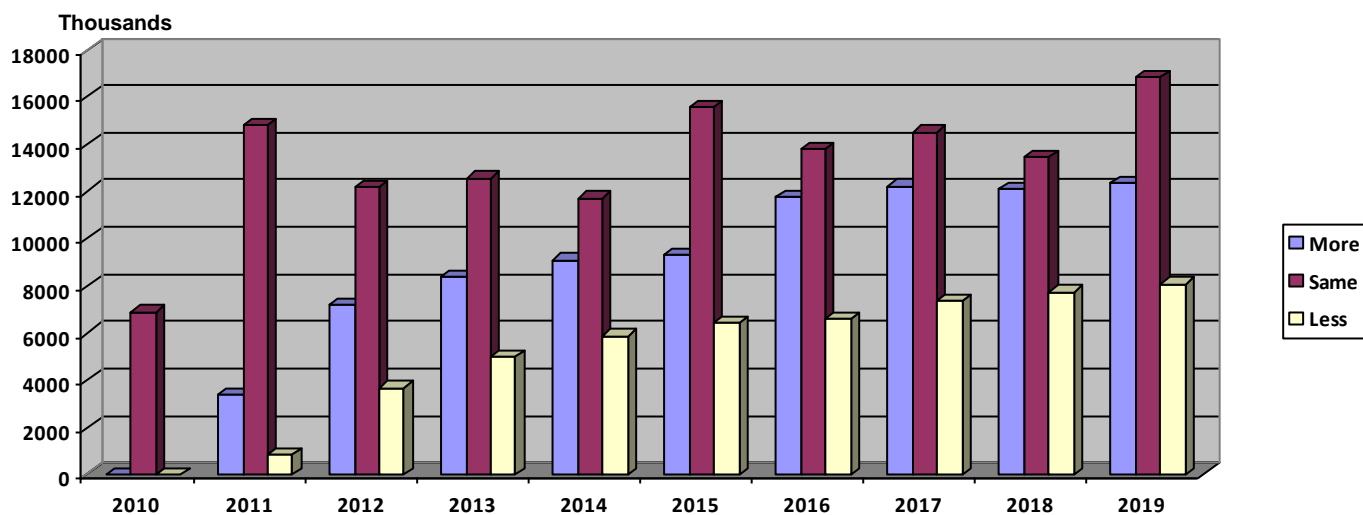
This page shows how well your organization has done in its efforts to re-engage lapsed and lapsing donors. Each year displayed in the table shows the number of donors who gave in that year, but did not give in the year before. Ideally, a strong donor reactivation program would be one part of the donor cultivation strategies your organization has in place, so as to address the issue of lapsing donors. Many times a donor who has begun to lapse can be reactivated by a timely phone call or a note from a senior executive.

The importance of donor reactivation is reinforced by the fact that every year normal donor attrition reduces your donor file. In order to minimize the number of lost donors it is important to not only engage in donor acquisition programs but also in donor reactivation strategies. Under normal circumstances it is more cost effective to reactivate donors than it is to acquire new ones.

Donor reactivation strategies are also important in ensuring that donor attrition does not jeopardize your donor file size. New donors who are acquired on an annual basis coupled with the number of reactivated donors should always be greater than the attrition rate in order to ensure donor file stability and healthy donor file growth.

When looking at the "revenue from reactivated donors" line on this page it becomes clear that the benefits of a strong donor reactivation program go beyond donor file considerations and include the benefit of additional revenue that otherwise might have been lost.

## Donors Who Gave More, The Same Or Less



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Gave More</b>	<b>0</b>	<b>3,372</b>	<b>7,214</b>	<b>8,387</b>	<b>9,083</b>	<b>9,327</b>	<b>11,772</b>	<b>12,211</b>	<b>12,059</b>	<b>12,357</b>
Amt Given Last Year	\$0	\$253,735	\$503,387	\$637,532	\$742,112	\$824,966	\$1,040,019	\$1,243,555	\$1,286,519	\$1,378,837
Amt Given This Year	\$0	\$596,452	\$997,181	\$1,188,069	\$1,332,871	\$1,429,223	\$1,871,635	\$2,113,556	\$2,225,941	\$2,293,764
% Increase	0	135	98	86	80	73	80	70	73	66
<b>Gave The Same</b>	<b>6,888</b>	<b>14,803</b>	<b>12,169</b>	<b>12,555</b>	<b>11,709</b>	<b>15,579</b>	<b>13,751</b>	<b>14,498</b>	<b>13,458</b>	<b>16,833</b>
Amt Given	\$657,897	\$977,244	\$751,925	\$831,756	\$873,612	\$1,075,964	\$1,033,598	\$1,232,475	\$1,266,527	\$1,518,507
<b>Gave Less</b>	<b>0</b>	<b>861</b>	<b>3,678</b>	<b>4,968</b>	<b>5,881</b>	<b>6,445</b>	<b>6,573</b>	<b>7,321</b>	<b>7,724</b>	<b>8,063</b>
Amt Given Last Year	\$0	\$139,647	\$543,191	\$709,593	\$850,657	\$977,804	\$986,515	\$1,217,457	\$1,456,977	\$1,603,644
Amt Given This Year	\$0	\$80,695	\$294,424	\$426,761	\$512,386	\$591,004	\$615,838	\$740,103	\$908,004	\$984,847
% Decrease	0	-42	-46	-40	-40	-40	-38	-39	-38	-39
<b>By Percent</b>										
Gave More	0	18	31	32	34	30	37	36	36	33
Gave The Same	100	78	53	48	44	50	43	43	40	45
Gave Less	0	5	16	19	22	21	20	22	23	22

Included in the electronic files that come with this report are two important tables. The first table shows the number of active donors who consistently increased their giving every year for the past three years. There were 4204 of these donors and the total additional revenue amounted to \$566,050.50. This could indicate that these donors have a rising level of commitment to your organization along with an increasing ability to give more.

The second table documents the number of active donors who reduced their giving. There were 1593 donors who consistently decreased their giving over the most recent 36 months. The total lost revenue from this group amounted to \$178,437.60. This decrease in revenue could indicate a loss of interest in your organization and might result in the loss of donors.

## **Analytical Considerations**

### **Donors Who Gave More, The Same Or Less**

This information can help you track any significant changes in donor giving levels over the years. Ideally the percentages of those who "gave more" would rise over the years as upgrading strategies successfully move donors from their current gift levels to greater involvement. There will always be a certain percentage of donors who are comfortable with their giving levels and are not interested in increasing the size of their gifts. It is not unusual to see that the majority of donors fall into this "gave the same" category.

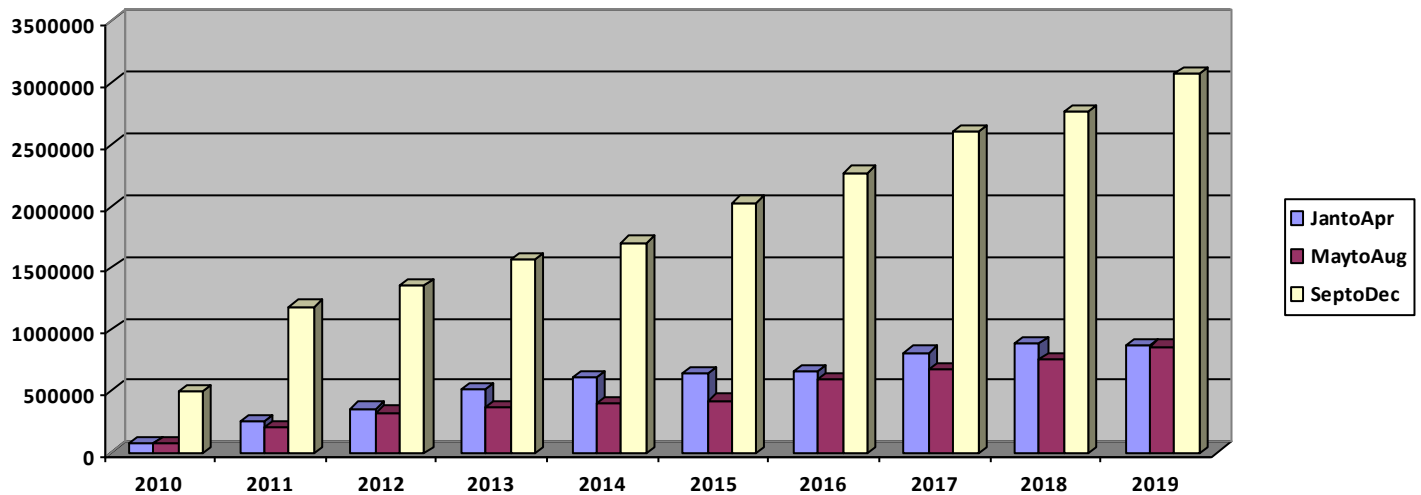
There can be many reasons why a donor might fall into the "gave less" category. Economic or employment situations change and there are some donors who no longer have the capacity to give in the same way they used to. It can be important however, to understand who these donors are and remain in contact with them, as sometimes the reason for their decreased giving is related to a growing dissatisfaction with the relationship they have to your organization. Issues of dissatisfaction can many times be remedied through timely personal contact, thus renewing the donors former level of commitment.

Staying informed through personal contact with donors who gave less because their circumstances have changed is important for another reason. Personal interest in donors who give less because of changing circumstances helps to cultivate the longer-term possibilities for when they are once again able support you at a greater level. Such interest helps to establish long term donor commitment to your organization.

Donors who have given more may be signaling that their interest and capacity to help has risen to a new level. These are donors who may be prime candidates for monthly donor, major giving or legacy giving programs.

# Results By Third Of Year

## Detail Report Total Gifts



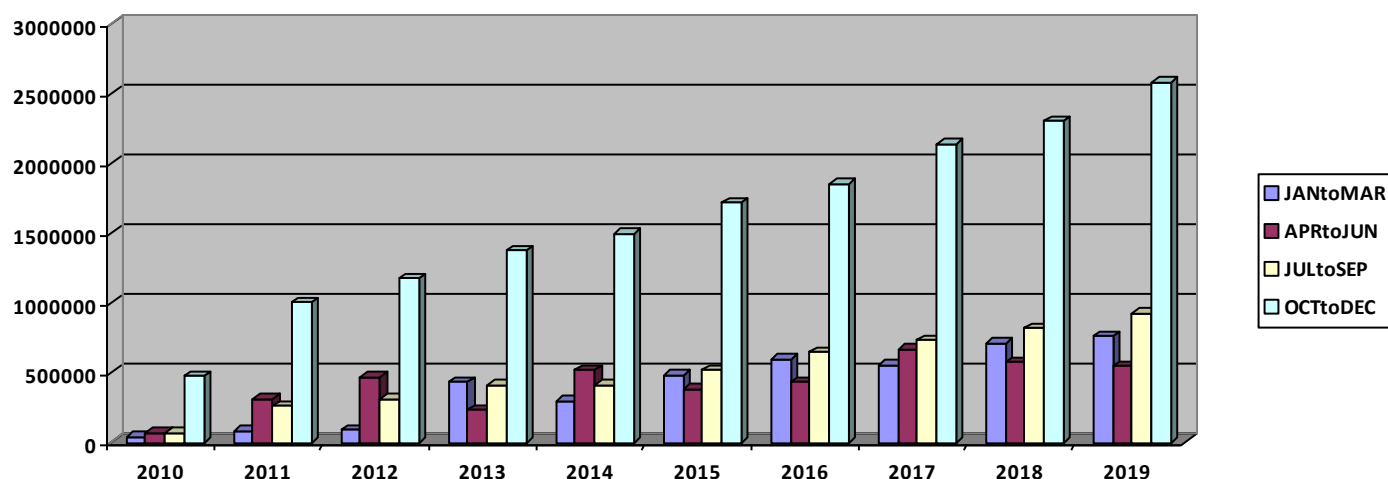
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Jan to Apr</b>	\$76,418	\$264,428	\$362,300	\$515,013	\$613,540	\$643,306	\$660,918	\$814,863	\$889,952	\$871,210
Avg Gift	\$70	\$51	\$44	\$45	\$48	\$48	\$46	\$49	\$52	\$48
Number Of Donors	955	4,625	7,142	9,281	10,191	10,624	10,955	12,748	12,085	11,959
# Gifts	1,091	5,169	8,197	11,448	12,723	13,439	14,254	16,711	16,954	18,014
Avg # Gifts Per Donor	1.14	1.12	1.15	1.23	1.25	1.26	1.30	1.31	1.40	1.51
<b>May to Aug</b>	\$81,785	\$204,586	\$330,310	\$366,351	\$404,546	\$427,253	\$593,842	\$678,822	\$754,558	\$862,412
Avg Gift	\$85	\$59	\$52	\$56	\$65	\$62	\$56	\$57	\$57	\$58
Number Of Donors	803	2,143	3,927	4,190	3,808	4,040	6,223	6,649	6,943	7,534
# Gifts	965	3,455	6,295	6,537	6,205	6,891	10,569	12,004	13,157	14,980
Avg # Gifts Per Donor	1.20	1.61	1.60	1.56	1.63	1.71	1.70	1.81	1.90	1.99
<b>Sep to Dec</b>	\$499,694	\$1,185,377	\$1,350,920	\$1,565,222	\$1,700,783	\$2,025,633	\$2,266,312	\$2,592,448	\$2,755,962	\$3,063,496
Avg Gift	\$73	\$53	\$49	\$51	\$52	\$51	\$54	\$59	\$62	\$59
Number Of Donors	6,029	17,123	20,221	22,713	23,435	28,417	28,885	30,044	29,559	34,073
# Gifts	6,802	22,560	27,425	30,642	32,859	39,698	42,305	43,778	44,261	51,790
Avg # Gifts Per Donor	1.13	1.32	1.36	1.35	1.40	1.40	1.46	1.46	1.50	1.52
<b>Totals</b>	\$657,897	\$1,654,391	\$2,043,530	\$2,446,586	\$2,718,869	\$3,096,191	\$3,521,071	\$4,086,133	\$4,400,471	\$4,797,118

The table and graph above show the changes in revenue by third of year. This summary provides an overview of giving patterns and can serve to indicate which sections of the year are showing overall growth.

It is important to note that while overall revenue figures may show growth, different sections of the year may vary greatly. The graph above shows the level of revenue growth over time for each section of the year. Any one of the three lines on the graph that shows declining growth suggests that donor cultivation efforts might need to be enhanced during that particular time of the year.

# Quarterly Results

## Detail Report Total Gifts



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Jan to Mar</b>	<b>\$43,469</b>	<b>\$79,997</b>	<b>\$87,790</b>	<b>\$432,904</b>	<b>\$295,608</b>	<b>\$482,958</b>	<b>\$593,881</b>	<b>\$556,216</b>	<b>\$712,628</b>	<b>\$758,925</b>
Avg Gift	\$80	\$89	\$56	\$43	\$53	\$48	\$46	\$48	\$52	\$49
Number Of Donors	480	774	1,271	8,305	4,530	8,220	10,446	8,948	10,357	11,289
# Gifts	544	900	1,577	9,987	5,630	10,143	12,912	11,471	13,758	15,514
Avg # Gifts Per Donor	1.13	1.16	1.24	1.20	1.24	1.23	1.24	1.28	1.33	1.37
<b>Apr to Jun</b>	<b>\$68,808</b>	<b>\$311,717</b>	<b>\$466,676</b>	<b>\$233,390</b>	<b>\$515,499</b>	<b>\$384,482</b>	<b>\$431,049</b>	<b>\$669,484</b>	<b>\$576,530</b>	<b>\$544,010</b>
Avg Gift	\$71	\$49	\$46	\$64	\$52	\$59	\$57	\$54	\$61	\$57
Number Of Donors	853	5,095	8,022	2,959	8,090	5,084	5,509	8,927	6,308	5,696
# Gifts	965	6,314	10,161	3,664	9,868	6,559	7,620	12,427	9,411	9,505
Avg # Gifts Per Donor	1.13	1.24	1.27	1.24	1.22	1.29	1.38	1.39	1.49	1.67
<b>Jul to Sept</b>	<b>\$68,373</b>	<b>\$262,562</b>	<b>\$314,233</b>	<b>\$409,572</b>	<b>\$412,280</b>	<b>\$516,251</b>	<b>\$647,811</b>	<b>\$727,900</b>	<b>\$814,863</b>	<b>\$922,065</b>
Avg Gift	\$94	\$44	\$46	\$47	\$53	\$49	\$47	\$53	\$51	\$54
Number Of Donors	628	4,816	4,987	6,291	5,629	7,754	9,951	9,778	10,731	11,259
# Gifts	730	5,988	6,762	8,714	7,788	10,489	13,653	13,756	15,852	17,228
Avg # Gifts Per Donor	1.16	1.24	1.36	1.39	1.38	1.35	1.37	1.41	1.48	1.53
<b>Oct to Dec</b>	<b>\$477,246</b>	<b>\$1,000,115</b>	<b>\$1,174,831</b>	<b>\$1,370,720</b>	<b>\$1,495,482</b>	<b>\$1,712,500</b>	<b>\$1,848,331</b>	<b>\$2,132,534</b>	<b>\$2,296,451</b>	<b>\$2,572,117</b>
Avg Gift	\$72	\$56	\$50	\$52	\$52	\$52	\$56	\$61	\$65	\$60
Number Of Donors	5,937	15,266	18,748	21,286	22,128	26,393	26,390	27,420	27,277	32,124
# Gifts	6,619	17,982	23,417	26,262	28,501	32,837	32,943	34,839	35,351	42,537
Avg # Gifts Per Donor	1.11	1.18	1.25	1.23	1.29	1.24	1.25	1.27	1.30	1.32
<b>Totals</b>	<b>\$657,897</b>	<b>\$1,654,391</b>	<b>\$2,043,530</b>	<b>\$2,446,586</b>	<b>\$2,718,869</b>	<b>\$3,096,191</b>	<b>\$3,521,071</b>	<b>\$4,086,133</b>	<b>\$4,400,471</b>	<b>\$4,797,118</b>

The graph above shows the level of revenue growth for each quarter of the year. This summary provides an overview of giving patterns and can serve to indicate which sections of the year are showing overall growth.

# Monthly Results

## Detail Report Total Gifts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Jan</b>	<b>\$17,171</b>	<b>\$29,776</b>	<b>\$27,874</b>	<b>\$50,393</b>	<b>\$48,801</b>	<b>\$53,273</b>	<b>\$56,051</b>	<b>\$55,969</b>	<b>\$83,350</b>	<b>\$97,358</b>
# Gifts	114	310	455	744	732	754	1,001	1,188	1,487	1,916
Avg Gift	\$151	\$96	\$61	\$68	\$67	\$71	\$56	\$47	\$56	\$51
<b>Feb</b>	<b>\$14,310</b>	<b>\$15,528</b>	<b>\$24,581</b>	<b>\$88,495</b>	<b>\$107,408</b>	<b>\$120,482</b>	<b>\$177,951</b>	<b>\$66,045</b>	<b>\$185,352</b>	<b>\$186,299</b>
# Gifts	261	237	431	1,828	2,042	2,424	3,654	1,367	3,306	3,798
Avg Gift	\$55	\$66	\$57	\$48	\$53	\$50	\$49	\$48	\$56	\$49
<b>Mar</b>	<b>\$11,988</b>	<b>\$34,693</b>	<b>\$35,334</b>	<b>\$294,016</b>	<b>\$139,399</b>	<b>\$309,202</b>	<b>\$359,879</b>	<b>\$434,201</b>	<b>\$443,926</b>	<b>\$475,269</b>
# Gifts	169	353	691	7,415	2,856	6,965	8,257	8,916	8,965	9,800
Avg Gift	\$71	\$98	\$51	\$40	\$49	\$44	\$44	\$49	\$50	\$48
<b>Apr</b>	<b>\$32,949</b>	<b>\$184,431</b>	<b>\$274,510</b>	<b>\$82,109</b>	<b>\$317,932</b>	<b>\$160,348</b>	<b>\$67,037</b>	<b>\$258,648</b>	<b>\$177,325</b>	<b>\$112,284</b>
# Gifts	547	4,269	6,620	1,461	7,093	3,296	1,342	5,240	3,196	2,500
Avg Gift	\$60	\$43	\$41	\$56	\$45	\$49	\$50	\$49	\$55	\$45
<b>May</b>	<b>\$26,304</b>	<b>\$72,739</b>	<b>\$103,087</b>	<b>\$54,412</b>	<b>\$72,496</b>	<b>\$69,194</b>	<b>\$175,813</b>	<b>\$204,370</b>	<b>\$157,116</b>	<b>\$156,670</b>
# Gifts	323	1,131	1,846	632	887	925	3,110	3,506	2,404	2,757
Avg Gift	\$81	\$64	\$56	\$86	\$82	\$75	\$57	\$58	\$65	\$57
<b>Jun</b>	<b>\$9,556</b>	<b>\$54,547</b>	<b>\$89,078</b>	<b>\$96,869</b>	<b>\$125,071</b>	<b>\$154,940</b>	<b>\$188,199</b>	<b>\$206,466</b>	<b>\$242,090</b>	<b>\$275,056</b>
# Gifts	95	914	1,695	1,571	1,888	2,338	3,168	3,681	3,811	4,248
Avg Gift	\$101	\$60	\$53	\$62	\$66	\$66	\$59	\$56	\$64	\$65
<b>Jul</b>	<b>\$29,246</b>	<b>\$46,499</b>	<b>\$83,351</b>	<b>\$103,375</b>	<b>\$131,771</b>	<b>\$134,201</b>	<b>\$128,449</b>	<b>\$139,196</b>	<b>\$180,032</b>	<b>\$196,627</b>
# Gifts	404	808	1,581	1,973	2,130	2,272	2,369	2,395	3,150	3,472
Avg Gift	\$72	\$58	\$53	\$52	\$62	\$59	\$54	\$58	\$57	\$57
<b>Aug</b>	<b>\$16,679</b>	<b>\$30,801</b>	<b>\$54,794</b>	<b>\$111,696</b>	<b>\$75,208</b>	<b>\$68,918</b>	<b>\$101,381</b>	<b>\$128,790</b>	<b>\$175,320</b>	<b>\$234,060</b>
# Gifts	143	602	1,173	2,361	1,300	1,356	1,922	2,422	3,792	4,503
Avg Gift	\$117	\$51	\$47	\$47	\$58	\$51	\$53	\$53	\$46	\$52
<b>Sep</b>	<b>\$22,448</b>	<b>\$185,262</b>	<b>\$176,088</b>	<b>\$194,502</b>	<b>\$205,301</b>	<b>\$313,132</b>	<b>\$417,981</b>	<b>\$459,913</b>	<b>\$459,510</b>	<b>\$491,379</b>
# Gifts	183	4,578	4,008	4,380	4,358	6,861	9,362	8,939	8,910	9,253
Avg Gift	\$123	\$40	\$44	\$44	\$47	\$46	\$45	\$51	\$52	\$53
<b>Oct</b>	<b>\$37,833</b>	<b>\$162,617</b>	<b>\$236,597</b>	<b>\$217,398</b>	<b>\$335,038</b>	<b>\$279,656</b>	<b>\$247,917</b>	<b>\$386,756</b>	<b>\$393,976</b>	<b>\$501,815</b>
# Gifts	647	3,004	5,149	4,636	7,180	5,946	5,026	6,077	6,660	9,541
Avg Gift	\$58	\$54	\$46	\$47	\$47	\$47	\$49	\$64	\$59	\$53
<b>Nov</b>	<b>\$44,639</b>	<b>\$126,560</b>	<b>\$252,406</b>	<b>\$358,397</b>	<b>\$290,158</b>	<b>\$530,404</b>	<b>\$565,350</b>	<b>\$662,566</b>	<b>\$702,030</b>	<b>\$695,315</b>
# Gifts	506	2,155	5,986	7,580	6,491	12,033	10,932	12,046	12,405	12,338
Avg Gift	\$88	\$59	\$42	\$47	\$45	\$44	\$52	\$55	\$57	\$56
<b>Dec</b>	<b>\$394,774</b>	<b>\$710,938</b>	<b>\$685,828</b>	<b>\$794,926</b>	<b>\$870,285</b>	<b>\$902,440</b>	<b>\$1,035,063</b>	<b>\$1,083,212</b>	<b>\$1,200,445</b>	<b>\$1,374,987</b>
# Gifts	5,466	12,823	12,282	14,046	14,830	14,858	16,985	16,716	16,286	20,658
Avg Gift	\$72	\$55	\$56	\$57	\$59	\$61	\$61	\$65	\$74	\$67
<b>Totals</b>	<b>\$657,897</b>	<b>\$1,654,391</b>	<b>\$2,043,530</b>	<b>\$2,446,586</b>	<b>\$2,718,869</b>	<b>\$3,096,191</b>	<b>\$3,521,071</b>	<b>\$4,086,133</b>	<b>\$4,400,471</b>	<b>\$4,797,118</b>

## **Analytical Considerations**

### **Results By Third, Quarter And Month Of Year**

These pages show a breakdown of results by time period. This can be helpful for planning purposes and understanding which times of the year yield the best results. For example, you may note that the first and last quarters of the year show strong returns but the second and third quarters show weak returns.

Using these results in combination with the appeal results page shown later in this report, it becomes possible to assess whether appeals in the weak quarters need to be changed or possibly eliminated. It may become evident that resources allocated to some appeals may be better spent at a different time of year.

You may also note stronger average gift amounts or a higher number of average gifts during specific times of the year and these may be an indicator that focusing cultivation and appeal efforts during these times might be warranted.

It is also interesting to view the year over year results in each time period noting any unusual changes. Special events, specific appeals and other activities that occur in one year and not in another may have a profound effect on results and may explain why one year stands out over others.

# Monthly Appeal Results

Total Number Of Appeals Detail Report										
Total # Of Appeals	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Jan</b>	2	3	3	5	5	5	5	5	7	8
Total Amount	\$17,171	\$29,776	\$27,874	\$50,393	\$48,801	\$53,273	\$56,051	\$55,969	\$83,350	\$97,358
<b>Feb</b>	1	3	3	4	6	6	6	5	8	10
Total Amount	\$14,310	\$15,528	\$24,581	\$88,495	\$107,408	\$120,482	\$177,951	\$66,045	\$185,352	\$186,299
<b>Mar</b>	1	3	3	4	5	5	5	5	8	10
Total Amount	\$11,988	\$34,693	\$35,334	\$294,016	\$139,399	\$309,202	\$359,879	\$434,201	\$443,926	\$475,269
<b>Apr</b>	2	3	3	4	5	5	5	5	8	10
Total Amount	\$32,949	\$184,431	\$274,510	\$82,109	\$317,932	\$160,348	\$67,037	\$258,648	\$177,325	\$112,284
<b>May</b>	2	3	3	4	4	5	5	5	8	9
Total Amount	\$26,304	\$72,739	\$103,087	\$54,412	\$72,496	\$69,194	\$175,813	\$204,370	\$157,116	\$156,670
<b>Jun</b>	2	3	3	4	4	5	4	4	7	8
Total Amount	\$9,556	\$54,547	\$89,078	\$96,869	\$125,071	\$154,940	\$188,199	\$206,466	\$242,090	\$275,056
<b>Jul</b>	2	3	3	4	5	6	4	4	6	9
Total Amount	\$29,246	\$46,499	\$83,351	\$103,375	\$131,771	\$134,201	\$128,449	\$139,196	\$180,032	\$196,627
<b>Aug</b>	2	3	3	5	5	5	5	6	8	11
Total Amount	\$16,679	\$30,801	\$54,794	\$111,696	\$75,208	\$68,918	\$101,381	\$128,790	\$175,320	\$234,060
<b>Sep</b>	2	3	3	4	6	6	5	6	9	9
Total Amount	\$22,448	\$185,262	\$176,088	\$194,502	\$205,301	\$313,132	\$417,981	\$459,913	\$459,510	\$491,379
<b>Oct</b>	2	3	3	5	6	5	5	6	8	10
Total Amount	\$37,833	\$162,617	\$236,597	\$217,398	\$335,038	\$279,656	\$247,917	\$386,756	\$393,976	\$501,815
<b>Nov</b>	2	3	3	6	6	6	6	6	8	10
Total Amount	\$44,639	\$126,560	\$252,406	\$358,397	\$290,158	\$530,404	\$565,350	\$662,566	\$702,030	\$695,315
<b>Dec</b>	2	3	4	5	6	6	5	7	9	11
Total Amount	\$394,774	\$710,938	\$685,828	\$794,926	\$870,285	\$902,440	\$1,035,063	\$1,083,212	\$1,200,445	\$1,374,987
<b>Totals</b>	22	36	37	54	63	65	60	64	94	115

The table above shows the number of appeals that your organization has undertaken during the time period covered by this report. The table shows the total number of appeals made in any given month in relation to the total income for that month. While results for any particular appeal can span multiple months this information can be helpful when trying to track frequency of ask in relation to results.

A detailed summary of appeals and how well they performed is provided as an appendix to this report.

## **Analytical Considerations**

### **Monthly Appeal Results**

The table on this page gives a snapshot of the overall number of appeals that took place and situates them in the month in which they occurred. This can be helpful when trying to determine whether appeals in any given time period are effective. Using these results, it may be possible to assess whether specific appeal efforts should be shifted to alternative times of the year, when results show that response rates are better.

One example might include the observation that an appeal launched in June shows good results but one launched in September does not. It may be worth reviewing the two appeals to see if there are specific aspects of the June appeal that do not appear in the September appeal. These could then be incorporated into the September appeal so as to produce better results.

Another example might include the observation that an identical appeal does well in one time period but not in another. It may be worth reviewing these appeals with a view to moving the timing of the weaker appeal or expanding the stronger appeal, by reallocating the resources of the weaker appeal to the one that produces better results.

Appeal results should be used in conjunction with the quarterly and monthly results pages in this report so as to maintain a larger perspective on the overall performance of these appeals. It is possible that an appeal that has been used successfully every year during a specific time period might show poor results during one specific year, possibly due to a specific economic issue that occurred at that time. It would be important to judge the success of any given appeal over the longer term so as to avoid abandoning or changing an appeal that might otherwise have continued to be successful.

# Long Term Donor Value

<b>2010</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>	<b>Year 6</b>	<b>Year 7</b>	<b>Year 8</b>	<b>Year 9</b>	<b>Year 10</b>
# Acquired	6,888	6,888	6,888	6,888	6,888	6,888	6,888	6,888	6,888	6,888
# Gave To Date	6,888	5,093	4,488	4,096	3,771	3,618	3,417	3,215	2,949	2,757
# Gifts To Date	8,858	20,916	31,840	41,893	51,576	61,296	71,163	80,518	89,287	98,239
Avg # Gifts Per Donor	1.3	3.0	4.6	6.1	7.5	8.9	10.3	11.7	13.0	14.3
Revenue To Date	\$657,897	\$1,426,801	\$2,129,766	\$2,824,308	\$3,495,477	\$4,191,922	\$4,920,911	\$5,615,130	\$6,298,673	\$6,964,358
Avg Gift Amt	\$74	\$68	\$67	\$67	\$68	\$68	\$69	\$70	\$71	\$71
LTDV (Avg Rev Per Donor)	\$96	\$207	\$309	\$410	\$507	\$609	\$714	\$815	\$914	\$1,011
<b>2011</b>										
# Acquired		13,943	13,943	13,943	13,943	13,943	13,943	13,943	13,943	13,943
# Gave To Date		13,943	8,560	7,288	6,417	6,099	5,672	5,382	4,903	4,773
# Gifts To Date		19,126	37,846	54,448	69,275	83,554	97,978	111,661	124,645	138,111
Avg # Gifts Per Donor		1.4	2.7	3.9	5.0	6.0	7.0	8.0	8.9	9.9
Revenue To Date		\$885,487	\$1,695,659	\$2,469,970	\$3,193,287	\$3,914,631	\$4,661,880	\$5,457,753	\$6,244,639	\$7,036,298
Avg Gift Amt		\$46	\$45	\$45	\$46	\$47	\$48	\$49	\$50	\$51
LTDV (Avg Rev Per Donor)		\$64	\$122	\$177	\$229	\$281	\$334	\$391	\$448	\$505
<b>2012</b>										
# Acquired			10,013	10,013	10,013	10,013	10,013	10,013	10,013	10,013
# Gave To Date			10,013	5,717	4,990	4,573	4,309	4,025	3,624	3,482
# Gifts To Date			12,273	23,679	33,905	43,832	53,891	63,689	72,867	82,377
Avg # Gifts Per Donor			1.2	2.4	3.4	4.4	5.4	6.4	7.3	8.2
Revenue To Date			\$530,393	\$1,021,519	\$1,506,869	\$1,983,861	\$2,484,231	\$3,004,891	\$3,516,482	\$4,019,388
Avg Gift Amt			\$43	\$43	\$44	\$45	\$46	\$47	\$48	\$49
LTDV (Avg Rev Per Donor)			\$53	\$102	\$150	\$198	\$248	\$300	\$351	\$401
<b>2013</b>										
# Acquired				8,809	8,809	8,809	8,809	8,809	8,809	8,809
# Gave To Date				8,809	4,838	4,265	3,971	3,626	3,321	3,213
# Gifts To Date				10,566	19,696	28,258	37,105	45,687	53,960	62,527
Avg # Gifts Per Donor				1.2	2.2	3.2	4.2	5.2	6.1	7.1
Revenue To Date				\$486,608	\$929,606	\$1,339,034	\$1,769,365	\$2,244,442	\$2,717,370	\$3,184,117
Avg Gift Amt				\$46	\$47	\$47	\$48	\$49	\$50	\$51
LTDV (Avg Rev Per Donor)				\$55	\$106	\$152	\$201	\$255	\$308	\$361
<b>2014</b>										
# Acquired					6,657	6,657	6,657	6,657	6,657	6,657
# Gave To Date					6,657	3,523	3,138	2,922	2,554	2,456
# Gifts To Date					7,921	14,903	21,751	28,601	35,160	41,956
Avg # Gifts Per Donor					1.2	2.2	3.3	4.3	5.3	6.3
Revenue To Date					\$396,034	\$710,522	\$1,045,167	\$1,386,147	\$1,731,969	\$2,082,390
Avg Gift Amt					\$50	\$48	\$48	\$48	\$49	\$50
LTDV (Avg Rev Per Donor)					\$59	\$107	\$157	\$208	\$260	\$313

# Long Term Donor Value

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
<b>2015</b>										
# Acquired						9,273	9,273	9,273	9,273	9,273
# Gave To Date						9,273	4,968	4,270	3,846	3,626
# Gifts To Date						10,558	20,043	29,183	38,174	47,308
Avg # Gifts Per Donor						1.1	2.2	3.1	4.1	5.1
Revenue To Date						\$477,494	\$885,511	\$1,344,548	\$1,814,828	\$2,292,633
Avg Gift Amt						\$45	\$44	\$46	\$48	\$48
LTDV (Avg Rev Per Donor)						\$51	\$95	\$145	\$196	\$247
<b>2016</b>										
# Acquired							6,621	6,621	6,621	6,621
# Gave To Date							6,621	3,338	2,849	2,652
# Gifts To Date							7,598	14,173	20,403	26,695
Avg # Gifts Per Donor							1.1	2.1	3.1	4.0
Revenue To Date							\$371,471	\$692,011	\$1,015,493	\$1,356,875
Avg Gift Amt							\$49	\$49	\$50	\$51
LTDV (Avg Rev Per Donor)							\$56	\$105	\$153	\$205
<b>2017</b>										
# Acquired								7,252	7,252	7,252
# Gave To Date								7,252	3,558	3,220
# Gifts To Date								8,510	15,536	22,625
Avg # Gifts Per Donor								1.2	2.1	3.1
Revenue To Date								\$479,746	\$852,149	\$1,214,247
Avg Gift Amt								\$56	\$55	\$54
LTDV (Avg Rev Per Donor)								\$66	\$118	\$167
<b>2018</b>										
# Acquired									5,637	5,637
# Gave To Date									5,637	2,915
# Gifts To Date									6,362	12,398
Avg # Gifts Per Donor									1.1	2.2
Revenue To Date									\$433,537	\$734,167
Avg Gift Amt									\$68	\$59
LTDV (Avg Rev Per Donor)									\$77	\$130
<b>2019</b>										
# Acquired										8,159
# Gave To Date										8,159
# Gifts To Date										8,942
Avg # Gifts Per Donor										1.1
Revenue To Date										\$537,785
Avg Gift Amt										\$60
LTDV (Avg Rev Per Donor)										\$66

# Analytical Considerations

## Long Term Donor Value

The next two pages show an average long term donor value for each group of donors acquired over the years. Long term donor value is a calculation based on the actual revenue received from the total number of donors acquired in any particular year.

For example, if all donations received from a group of 8,000 newly acquired donors were added up over the next five years, then it would be possible to calculate a five year long term donor value for that group. Hypothetically, if that total revenue were to be three million dollars, accumulated over five years, then the long term donor value of those 8,000 donors would be \$375 which is the result of the following calculation ( $\$3,000,000 / 8,000 = \$375$ ). Each donor in that group is then hypothetically considered to be worth \$375 to the organization over the course of five years, even though in actual fact not every single donor in that group has contributed at the same level over time.

The purpose of doing this is to show that a specific investment in new donor acquisition, although expensive, can be a worthwhile strategy in the long term. These pages show the actual long term donor value for your organization and as such they can assist you in demonstrating the value of investments made in donor acquisition programs.

For example, a hypothetical investment of 20% of long term donor value could be proposed as an acceptable budget to cover the costs of new donor acquisition. Using the numbers in the example above, 20% of \$375 is \$75.00 per donor. If the goal were to acquire 2000 new donors in the current year, then a budget of \$150,000 ( $2000 \text{ new donors} \times \$75 = \$150,000$ ) could be allocated with some assurance that, based on past experience and using proven acquisition appeals, this strategy could eventually lead to a satisfactory long term return on investment.

In the example above we used 20% as the hypothetical percentage for our calculation. The actual percentage that your organization allocates for new donor acquisition budgets would need to be calculated based upon actual costs incurred by your organization in the past. Viewing the long term donor values listed on these pages can help you set realistic goals for investing in proven donor acquisition appeals and justifying those budgets based on actual past results.

## **Part Two**

### **Active Donors In The Last Thirty Six Months**

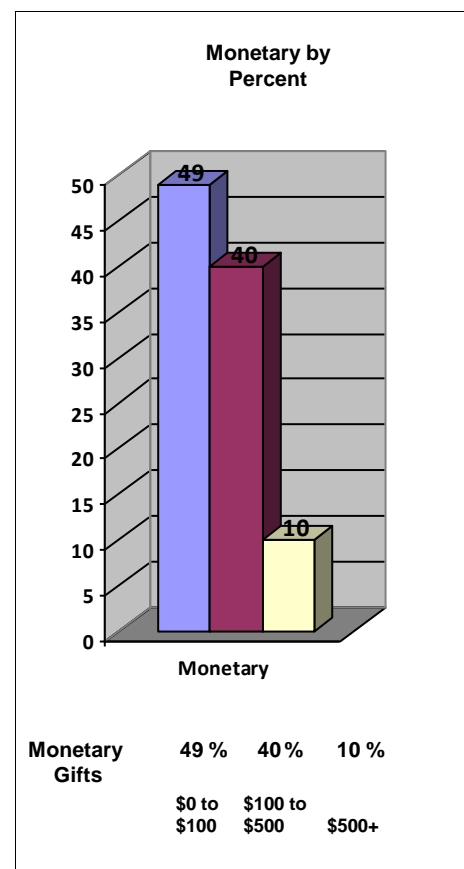
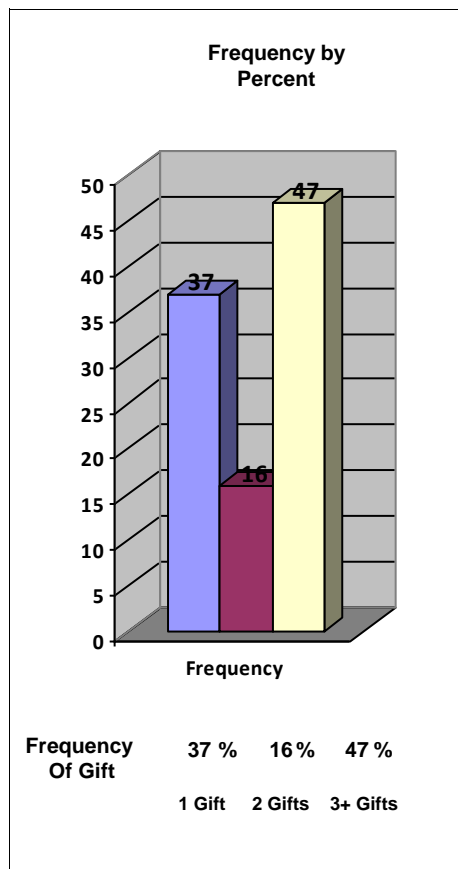
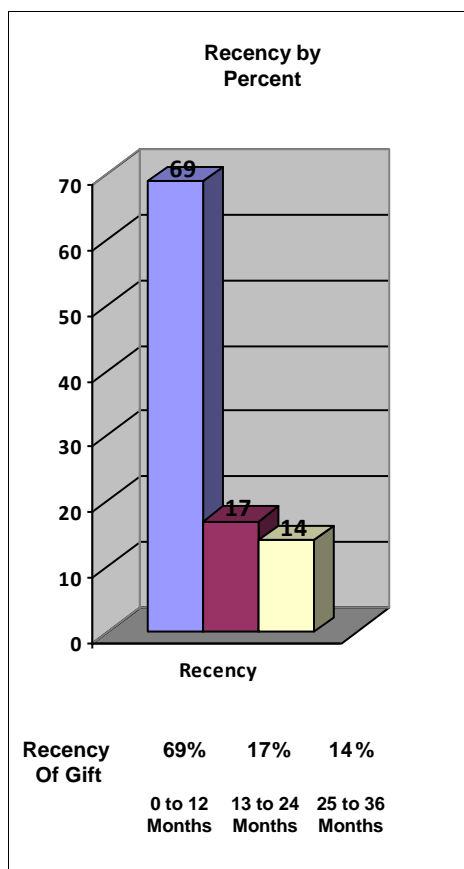
In the first part of this study we examined a full ten years of donor activity, so as to provide a comprehensive understanding of the changes that have occurred during that time period. Using the first part of the report it is possible to assess whether the overall strategic directions of your fundraising program are working as intended.

The second part of the study looks in depth at the donors who have been active in the most recent thirty-six months. We begin to look specifically at the recency, frequency and monetary value of their gifts and using this information we can detect patterns that can then inform the actions we might wish to take. The action reports provided with this donor review are the result of these insights and assist in methodically addressing opportunities that are revealed by the information. They are located on the disk at the back of this report.

It is in this part of the study that we will be able to highlight specific groups of donors who can be identified for the purpose of improving and refining our cultivation efforts. We begin by looking at an overview of the recency, frequency and monetary activity of your most recent donors.

# Recency, Frequency and Monetary Overview

## Donors Last 36 Months



Total # Donors Last 36 Months 53,826

This overview shows the status of your most recent donors (defined here as those who have given a gift in the last 36 months). The upper categories in the recency, frequency and monetary graphs are some of your most committed donors. In the pages that immediately follow we will review in detail the giving patterns of the donors in each category shown in the above table .

It is worth noting that the donors who fall in the 25 to 36 month recency category, yet are in the higher categories for frequency and monetary gifts are donors who have been committed to your cause but are also potentially at risk of lapsing. This group in particular is highlighted in the pages that follow as they are donors you may wish to cultivate to ensure they are not lost.

You will be able to readily identify the donors in all the above categories using the tables supplied on the disk at the back of this report.

# Analytical Considerations

## Recency, Frequency And Monetary Overview

The three graphs on this page can convey a sense of how committed your active donors are to your cause (active donors are defined as those who have given in the last 36 months). While we examine these three categories separately on this page we combine them in later pages to produce the kind of actionable directions that can enhance our cultivation efforts.

The first graph, recency by percent, shows in percentage terms how recently your active donors have given their last gift. A large percentage in the 0 to 12 month category indicates a willingness on the part of your donors to be actively engaged in supporting your cause. Larger percentages in the other two time frames may indicate that your donors are not as committed as they once were and donor reactivation strategies might be required to re-engage them. Ideally, a large percentage of your donors would be represented in the 0 to 12 month time frame.

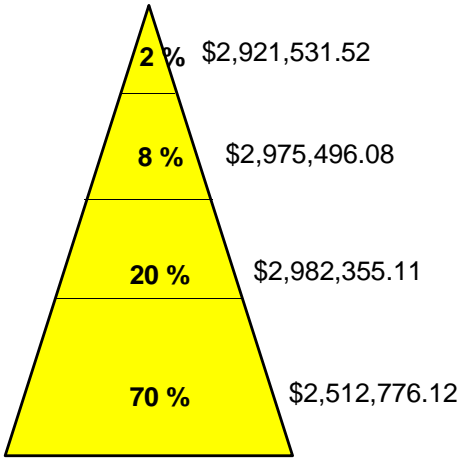
The second graph, frequency by percent, can be an indicator of the depth of commitment your active donors have towards your cause. A high percentage of active donors in the "three +" category is an excellent indicator that your donors have the depth of commitment which keeps them involved in supporting the work of your organization with multiple gifts. These are donors who have been most willing to respond to your appeals for support and they can be considered good prospects for monthly giving programs.

The third graph, monetary by percent, can be an indicator of your donor's ability and capacity to support your cause. Those who fall in the \$500+ category are going to be your best prospects for major gift and legacy giving programs. Those in the \$100 to \$500 category would be good candidates for monthly giving programs and those in the \$0 to \$100 category would be good candidates for cultivation strategies that can encourage them towards upgrading their annual commitment.

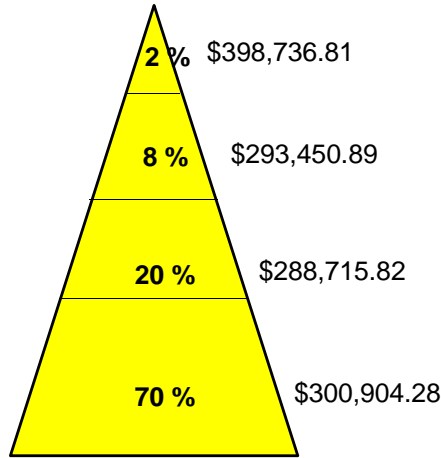
# Donors Pyramid

## Donors Last 36 Months

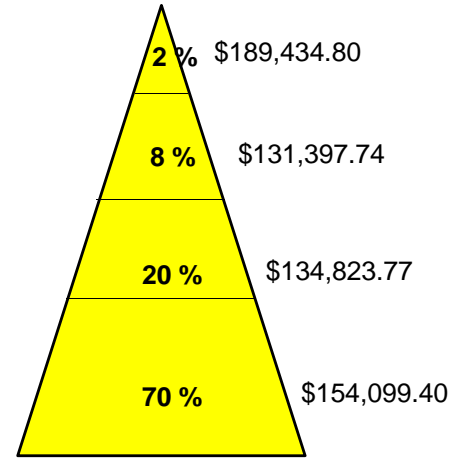
### 0 to 12 Months Dollar Amounts For Last 36 Months



### 13 to 24 Months Dollar Amounts For Last 36 Months



### 25 to 36 Months Dollar Amounts For Last 36 Months



		Top 2%	Next 8%	Next 20%	70%
<b>0 to 12 Months Dollar Amts For Last 36 Months</b>	# Donors	745	2980	7450	26078
	Revenue	\$2,921,531.52	\$2,975,496.08	\$2,982,355.11	\$2,512,776.12
	% of Total	25.65	26.12	26.18	22.06
	# Gifts	14125	41305	66686	80335
	Gifts Per Donor	18.96	13.86	8.95	3.08
	Avg Gift	\$207	\$72	\$45	\$31
	Avg Revenue Per Donor	\$3,922	\$998	\$400	\$96
<b>13 to 24 Months Dollar Amts For Last 36 Months</b>	# Donors	179	715	1788	6256
	Revenue	\$398,736.81	\$293,450.89	\$288,715.82	\$300,904.28
	% of Total	31.11	22.89	22.52	23.47
	# Gifts	906	3184	5436	9736
	Gifts Per Donor	5.06	4.45	3.04	1.56
	Avg Gift	\$440	\$92	\$53	\$31
	Avg Revenue Per Donor	\$2,228	\$410	\$161	\$48
<b>25 to 36 Months Dollar Amts For Last 36 Months</b>	# Donors	153	611	1528	5343
	Revenue	\$189,434.80	\$131,397.74	\$134,823.77	\$154,099.40
	% of Total	31.07	21.55	22.11	25.27
	# Gifts	376	1365	2312	5883
	Gifts Per Donor	2.46	2.23	1.51	1.10
	Avg Gift	\$504	\$96	\$58	\$26
	Avg Revenue Per Donor	\$1,238	\$215	88	\$29

Within the top 2% of each pyramid are those who are most likely to become major gift and monthly donors. Cultivation efforts can be focused on the top percentage of donors in these pyramids to maximize potential growth in revenue.

The tables on the disk attached to this report identify the donors in the above pyramids.

# **Analytical Considerations**

## **Active Donors Pyramid**

Fundraisers know that in most instances, a small number of donors give the largest amount of revenue to your cause. The top two percent of your donors can often give more than any other segment in your donor database. The three pyramids on this page illustrate how your active donors fit into the different percentage segments. Segments are broken out into active donors within 0 to 12 months, 13 to 24 months and 25 to 36 months. Each percentage segment in the pyramids is shown with the total amount of gifts that they contribute.

Using this page you can easily target the top two percent of your donor database for enhanced cultivation and stewardship efforts. The top two percent of donors are listed by donor I.D. number in the action reports on the disk that accompany this review along with the I.D. numbers for all other percentage segments shown in the three pyramids.

It would be important to review the top donors who show up in the pyramids for 13 to 24 months and 25 to 36 months. These are donors who at one point were your top contributors but for whatever reason have chosen not to give in the most recent twelve months. While some donors give a single large gift that is meant to be a one-time event there are others who, for whatever reason, chose not to contribute in the most recent twelve months. A careful review of these donors can ensure that your top contributors are not inadvertently lost.

The top two percent and the next eight percent are segments of donors that can be considered prime prospects for major gift, legacy giving and monthly giving programs. Those who are listed in the bottom seventy percent can be encouraged through upgrading strategies to increase their commitment to the work of your organization.

# Giving Frequency By Recency Of Gift

Donors Last 36 Months

# Gifts Last 36 Months

Last Gift	# Donors	Percent *	# Gifts	# Donors	Percent *	Revenue	Total Gifts	Avg Gift	Avg Rev Per Donor
<b>0 - 12 Months</b>	<b>37253</b>	<b>69</b>	<b>1 Gift</b>	<b>9389</b>	<b>25</b>	<b>\$586,104</b>	<b>9,389</b>	<b>\$62</b>	<b>\$62</b>
			<b>2 Gifts</b>	<b>4932</b>	<b>13</b>	<b>\$640,755</b>	<b>9,864</b>	<b>\$65</b>	<b>\$130</b>
			<b>3 to 9 Gifts</b>	<b>17926</b>	<b>48</b>	<b>\$5,752,768</b>	<b>89,407</b>	<b>\$64</b>	<b>\$321</b>
			<b>10+ Gifts</b>	<b>5006</b>	<b>13</b>	<b>\$4,412,531</b>	<b>93,791</b>	<b>\$47</b>	<b>\$881</b>
<b>13 - 24 Months</b>	<b>8938</b>	<b>17</b>	<b>1 Gift</b>	<b>4207</b>	<b>47</b>	<b>\$300,413</b>	<b>4,207</b>	<b>\$71</b>	<b>\$71</b>
			<b>2 Gifts</b>	<b>2589</b>	<b>29</b>	<b>\$387,709</b>	<b>5,178</b>	<b>\$75</b>	<b>\$150</b>
			<b>3 to 9 Gifts</b>	<b>2027</b>	<b>23</b>	<b>\$467,312</b>	<b>8,145</b>	<b>\$57</b>	<b>\$231</b>
			<b>10+ Gifts</b>	<b>115</b>	<b>1</b>	<b>\$126,374</b>	<b>1,732</b>	<b>\$73</b>	<b>\$1,099</b>
<b>25 - 36 Months</b>	<b>7635</b>	<b>14</b>	<b>1 Gift</b>	<b>6223</b>	<b>82</b>	<b>\$376,765</b>	<b>6,223</b>	<b>\$61</b>	<b>\$61</b>
			<b>2 Gifts</b>	<b>990</b>	<b>13</b>	<b>\$113,124</b>	<b>1,980</b>	<b>\$57</b>	<b>\$114</b>
			<b>3 to 9 Gifts</b>	<b>401</b>	<b>5</b>	<b>\$111,518</b>	<b>1,482</b>	<b>\$75</b>	<b>\$278</b>
			<b>10+ Gifts</b>	<b>21</b>	<b>0</b>	<b>\$8,348</b>	<b>251</b>	<b>\$33</b>	<b>\$398</b>
<b>Total</b>	<b>53826</b>	<b>100%</b>	<b>1 Gift</b>	<b>19819</b>	<b>37</b>	<b>\$1,263,282</b>	<b>19,819</b>	<b>\$64</b>	<b>\$64</b>
			<b>2 Gifts</b>	<b>8511</b>	<b>16</b>	<b>\$1,141,589</b>	<b>17,022</b>	<b>\$67</b>	<b>\$134</b>
			<b>3 to 9 Gifts</b>	<b>20354</b>	<b>38</b>	<b>\$6,331,598</b>	<b>99,034</b>	<b>\$64</b>	<b>\$311</b>
			<b>10+ Gifts</b>	<b>5142</b>	<b>10</b>	<b>\$4,547,253</b>	<b>95,774</b>	<b>\$47</b>	<b>\$884</b>

The above table shows the breakdown by recency of the giving patterns of your most recent donors. Those in the 0 to 12 month category, who have given one gift, are likely to be your newest donors and could be targeted for cultivation efforts to strengthen their interest in your cause.

The highlighted area in the 25 to 36 month category is one that might also require special cultivation efforts. They are donors who have shown themselves to be committed to your cause but for some reason are potentially lapsing from current status. These donors are identified by category on the tables that are found on the disk at the back of this report should you wish to pursue a strategy of cultivation with them.

# Giving Frequency By Monetary Value

## Regular Donors Last 36 Months

### # Gifts Last 36 Months Of \$1.00 To \$100.00

Last Gift	# Donors	Percent *	# Gifts	# Donors	Percent *	Revenue	Total Gifts	Avg Gift	Avg Rev Per Donor
0 - 12 Months	16157	55	1 Gift	8838	55	\$332,076	8,838	\$38	\$38
			2 Gifts	3444	21	\$194,628	6,888	\$28	\$57
			3 to 9 Gifts	3865	24	\$286,926	13,919	\$21	\$74
			10+ Gifts	10	0	\$679	113	\$6	\$68
13 - 24 Months	6314	22	1 Gift	3848	61	\$154,072	3,848	\$40	\$40
			2 Gifts	1752	28	\$101,290	3,504	\$29	\$58
			3 to 9 Gifts	712	11	\$51,161	2,422	\$21	\$72
			10+ Gifts	2	0	\$182	33	\$6	\$91
25 - 36 Months	6719	23	1 Gift	5831	87	\$220,087	5,831	\$38	\$38
			2 Gifts	708	11	\$38,962	1,416	\$28	\$55
			3 to 9 Gifts	178	3	\$12,246	603	\$20	\$69
			10+ Gifts	2	0	\$180	25	\$7	\$90
Total	29190	100%	1 Gift	18517	63	\$706,234	18,517	\$38	\$38
			2 Gifts	5904	20	\$334,880	11,808	\$28	\$57
			3 to 9 Gifts	4755	16	\$350,332	16,944	\$21	\$74
			10+ Gifts	14	0	\$1,042	171	\$6	\$74

The above table shows a breakdown of donor giving patterns by monetary value. The table details the giving patterns of those who have given lifetime gifts between \$1.00 and \$100.00.

The highlighted area in the 25 to 36 month category is a reminder that some of your most committed donors in this gift range are potentially lapsing from current status.

# Giving Frequency By Monetary Value

## Middle Donors Last 36 Months

### # Gifts Last 36 Months Of \$100.00 To \$500.00

Last Gift	# Donors	Percent *	# Gifts	# Donors	Percent *	Revenue	Total Gifts	Avg Gift	Avg Rev Per Donor
0 - 12 Months	15900	84	1 Gift	484	3	\$114,675	484	\$237	\$237
			2 Gifts	1364	9	\$267,005	2,728	\$98	\$196
			3 to 9 Gifts	11758	74	\$2,710,165	61,567	\$44	\$230
			10+ Gifts	2294	14	\$744,873	36,014	\$21	\$325
13 - 24 Months	2303	12	1 Gift	319	14	\$74,514	319	\$234	\$234
			2 Gifts	753	33	\$149,026	1,506	\$99	\$198
			3 to 9 Gifts	1163	50	\$246,072	4,939	\$50	\$212
			10+ Gifts	68	3	\$19,775	985	\$20	\$291
25 - 36 Months	827	4	1 Gift	350	42	\$78,813	350	\$225	\$225
			2 Gifts	262	32	\$54,793	524	\$105	\$209
			3 to 9 Gifts	200	24	\$42,744	775	\$55	\$214
			10+ Gifts	15	2	\$3,618	166	\$22	\$241
Total	19030	100%	1 Gift	1153	6	\$268,001	1,153	\$232	\$232
			2 Gifts	2379	13	\$470,824	4,758	\$99	\$198
			3 to 9 Gifts	13121	69	\$2,998,980	67,281	\$45	\$229
			10+ Gifts	2377	12	\$768,266	37,165	\$21	\$323

The table above shows a breakdown of donor giving patterns by monetary value. The table details the giving patterns of those who have given lifetime gifts between \$100.00 and \$500.00.

The highlighted area in the 25 to 36 month category is a reminder that some of your most committed donors in this gift range are potentially lapsing from current status.

# Giving Frequency By Monetary Value

Top Donors Last 36 Months

# Gifts Last 36 Months Of More Than \$500.00

Last Gift	# Donors	Percent *	# Gifts	# Donors	Percent *	Revenue	Total Gifts	Avg Gift	Avg Rev Per Donor
0 - 12 Months	5196	93	1 Gift	67	1	\$139,354	67	\$2,080	\$2,080
			2 Gifts	124	2	\$179,122	248	\$722	\$1,445
			3 to 9 Gifts	2303	44	\$2,755,677	13,921	\$198	\$1,197
			10+ Gifts	2702	52	\$3,666,979	57,664	\$64	\$1,357
13 - 24 Months	321	6	1 Gift	40	12	\$71,828	40	\$1,796	\$1,796
			2 Gifts	84	26	\$137,393	168	\$818	\$1,636
			3 to 9 Gifts	152	47	\$170,080	784	\$217	\$1,119
			10+ Gifts	45	14	\$106,416	714	\$149	\$2,365
25 - 36 Months	89	2	1 Gift	42	47	\$77,865	42	\$1,854	\$1,854
			2 Gifts	20	22	\$19,370	40	\$484	\$968
			3 to 9 Gifts	23	26	\$56,529	104	\$544	\$2,458
			10+ Gifts	4	4	\$4,550	60	\$76	\$1,138
Total	5606	100%	1 Gift	149	3	\$289,047	149	\$1,940	\$1,940
			2 Gifts	228	4	\$335,885	456	\$737	\$1,473
			3 to 9 Gifts	2478	44	\$2,982,286	14,809	\$201	\$1,204
			10+ Gifts	2751	49	\$3,777,945	58,438	\$65	\$1,373

The table above shows a breakdown of donor giving patterns by monetary value. The table details the giving patterns of those who have given lifetime gifts of more than \$500.00.

The highlighted area in the 25 to 36 month category is a reminder that some of your most committed donors in this gift range are potentially lapsing from current status. This might be the first group you would want to cultivate so as to ensure they are not lost from your active file - the more so because they have demonstrated their capacity to be top donors in support of your cause. This group can be identified in the tables that are on the disk provided with this report.

## **Analytical Considerations**

### **Active Donor Giving Frequency by Recency and Monetary Value**

The next four pages show information that contains the greatest number of actionable items in this report. Recency, frequency and monetary value (RFM) is combined so as to allow you the ability to target specific donors based upon their giving history. The first of the four pages gives an overview of the RFM for all your active donors. The second, third and fourth pages drill down showing donors who have given in the \$1 to \$100 range, the \$101 to \$500 range and finally donors who have given \$501 or more.

Those in the 0 to 12 month time period would be your most recently active donors and these are broken down into groups of donors who have given one gift, two gifts, three to nine gifts and ten plus gifts. The advantage of doing this is that it allows you to target specific groups of donors based on their giving ranges, frequency and gift amounts. For example, donors who have given one gift in the 0 to 12 month time frame are likely your newest donors. These can be targeted with strategies to welcome and solicit a second gift as soon as is appropriate.

Those who are in the 0 to 12 month time period and have given ten or more gifts show themselves to be highly committed to your cause and would be ideal candidates for monthly donor programs.

The area highlighted in yellow shows donors that could be on the verge of lapsing. They are active donors who have shown commitment to your cause by giving multiple gifts in the past but for some reason they have not given in the last 25 to 36 months. Reclaiming these potentially lapsing donors through donor reactivation strategies would be of high priority. Of special importance are those donors in the highlighted area who are on the page listing gifts in the amount of \$501 or more. These are donors who have given substantial amounts of revenue to your organization but are on the verge of lapsing.

Of equal importance would be donors giving gifts of \$501 and more who fall into the 0 to 12 month category and give three or more gifts. These would be ideal candidates for major gift and legacy gift programs.

The information for all of these categories on all four pages mentioned above are provided in the action reports that are found on the disk at the back of this report. These action reports can save you time by providing the information you need to target these different groups of donors in a meaningful and timely fashion.

# Consecutive Years Giving History

## Donors Who Have Given Consecutively For

	2 Years	3 Years	4 Years	5 Years	6 Years	7 Years	8 Years	9 Years	10 Years
<b>All Donors</b>									
# Donors	9,595	5,460	3,569	3,287	2,235	2,429	2,331	2,807	1,731
Revenue	\$1,435,960	\$1,416,137	\$1,452,555	\$1,797,301	\$1,685,515	\$2,276,961	\$2,582,006	\$3,983,368	\$3,806,119
# Gifts	27,363	29,394	29,561	37,585	34,066	43,985	49,807	74,832	56,854
Avg # Gifts	2.85	5.38	8.28	11.43	15.24	18.11	21.37	26.66	32.84
Avg Gift Amt	\$52	\$48	\$49	\$48	\$49	\$52	\$52	\$53	\$67
Avg Revenue Per Donor	\$150	\$259	\$407	\$547	\$754	\$937	\$1,108	\$1,419	\$2,199

## Donors Active In The Last 0 to 12 Months

# Donors	2,915	2,463	1,739	2,158	1,382	1,736	1,884	2,599	1,731
Revenue	\$498,795	\$707,444	\$811,636	\$1,260,434	\$1,081,519	\$1,648,541	\$2,099,150	\$3,629,699	\$3,806,119
# Gifts	9,532	14,687	15,955	26,389	22,949	32,613	41,327	70,546	56,854
Avg # Gifts	3.27	5.96	9.17	12.23	16.61	18.79	21.94	27.14	32.84
Avg Gift Amt	\$52	\$48	\$51	\$48	\$47	\$51	\$51	\$51	\$67
Avg Revenue Per Donor	\$171	\$287	\$467	\$584	\$783	\$950	\$1,114	\$1,397	\$2,199

## Donors Active In The Last 13 to 24 Months

# Donors	1,095	505	429	227	225	226	290	208	0
Revenue	\$199,636	\$119,040	\$138,747	\$117,955	\$152,375	\$186,177	\$285,499	\$353,669	
# Gifts	2,872	2,378	3,010	1,955	2,621	3,710	5,552	4,286	
Avg # Gifts	2.62	4.71	7.02	8.61	11.65	16.42	19.14	20.61	
Avg Gift Amt	\$70	\$50	\$46	\$60	\$58	\$50	\$51	\$83	
Avg Revenue Per Donor	\$182	\$236	\$323	\$520	\$677	\$824	\$984	\$1,700	

## Donors Active In The Last 25 to 36 Months

# Donors	777	536	247	237	240	302	157	0	0
Revenue	\$91,352	\$122,285	\$85,431	\$97,685	\$159,806	\$239,687	\$197,357		
# Gifts	1,951	2,425	1,596	2,292	3,059	4,986	2,928		
Avg # Gifts	2.51	4.52	6.46	9.67	12.75	16.51	18.65		
Avg Gift Amt	\$47	\$50	\$54	\$43	\$52	\$48	\$67		
Avg Revenue Per Donor	\$118	\$228	\$346	\$412	\$666	\$794	\$1,257		

## Analytical Considerations

### Consecutive Years Giving History

This page shows the number of donors who have given to your organization over many consecutive years without missing a single year. This table consists of four sections, the first showing consecutive giving history for all donors. It is important to note that this page includes only those donors who have given consecutively without any gaps in their annual giving history. For example, this page would include a donor who had given every year for the past five years but would not include a donor who had given in years one, three and five only.

The donors who give consecutively are shown in categories that are listed by recency of gift. This will allow you to identify donors who are currently active and have been giving to you consecutively for many years, so that you can use this information to engage in donor recognition strategies.

The information also makes it possible to identify and target donors who have given for many consecutive years but for some reason stopped giving sometime in the past twenty-four to thirty-six months. These are donors who have shown unfailing loyalty to your organization over the years and would be top candidates for donor reactivation strategies.

Donors in the 0 to 12 month time frame who have given faithfully for many years would be ideal candidates for monthly giving and legacy giving programs. All the information about these donors can be found in the action reports that are located on the disk at the back of this report.

It is important to note that the number of donors in the “2 years” category is not a cumulative number of donors who are tracked throughout the later years. Each year category contains the number of donors who gave for that time period. For example, a donor who gave for “4 years” consecutively would not also be included in the number of donors showing in the “2 Years” or “3 Years” column. Each column shows the number of donors who gave consecutively for that specific amount of time and they would not be included in any of the other columns.

# Time Of Year Donors Give

## Donors Who Gave Only In

Donors Who Have Given Consecutively For

	2 Years	3 Years	4 Years	5 Years	6 Years	7 Years	8 Years	9 Years	10 Years
<b>Jan - Feb</b>									
# Donors	36	6	6	3	3	0	1	0	1
# Gifts	73	21	24	15	18	0	9	0	10
Avg # Gifts Per Donor	2.0	3.5	4.0	5.0	6.0	0.0	9.0	0.0	10.0
Revenue	\$5,649	\$460	\$1,154	\$1,070	\$860	\$0	\$840	\$0	\$300
Avg Gift Amt	\$77	\$22	\$48	\$71	\$48	\$0	\$93	\$0	\$30
Avg Revenue Per Donor	\$157	\$77	\$192	\$357	\$287	\$0	\$840	\$0	\$300
<b>Mar - Apr</b>									
# Donors	62	11	1	1	0	1	2	0	0
# Gifts	125	33	4	5	0	7	16	0	0
Avg # Gifts Per Donor	2.0	3.0	4.0	5.0	0.0	7.0	8.0	0.0	0.0
Revenue	\$8,649	\$1,577	\$190	\$285	\$0	\$85	\$610	\$0	\$0
Avg Gift Amt	\$69	\$48	\$48	\$57	\$0	\$12	\$38	\$0	\$0
Avg Revenue Per Donor	\$140	\$143	\$190	\$285	\$0	\$85	\$305	\$0	\$0
<b>May - Jun</b>									
# Donors	16	5	3	2	1	0	1	2	1
# Gifts	32	15	12	10	7	0	8	18	10
Avg # Gifts Per Donor	2.0	3.0	4.0	5.0	7.0	0.0	8.0	9.0	10.0
Revenue	\$2,717	\$1,465	\$1,440	\$285	\$1,000	\$0	\$200	\$1,345	\$2,150
Avg Gift Amt	\$85	\$98	\$120	\$29	\$143	\$0	\$25	\$75	\$215
Avg Revenue Per Donor	\$170	\$293	\$480	\$143	\$1,000	\$0	\$200	\$673	\$2,150
<b>Jul - Aug</b>									
# Donors	7	2	0	0	0	0	0	1	0
# Gifts	14	6	0	0	0	0	0	18	0
Avg # Gifts Per Donor	2.0	3.0	0.0	0.0	0.0	0.0	0.0	18.0	0.0
Revenue	\$1,941	\$110	\$0	\$0	\$0	\$0	\$0	\$3,960	\$0
Avg Gift Amt	\$139	\$18	\$0	\$0	\$0	\$0	\$0	\$220	\$0
Avg Revenue Per Donor	\$277	\$55	\$0	\$0	\$0	\$0	\$0	\$3,960	\$0
<b>Sep - Oct</b>									
# Donors	191	29	4	2	2	0	2	0	1
# Gifts	394	91	16	10	15	0	16	0	10
Avg # Gifts Per Donor	2.1	3.1	4.0	5.0	7.5	0.0	8.0	0.0	10.0
Revenue	\$20,432	\$5,942	\$824	\$554	\$829	\$0	\$475	\$0	\$279
Avg Gift Amt	\$52	\$65	\$51	\$55	\$55	\$0	\$30	\$0	\$28
Avg Revenue Per Donor	\$107	\$205	\$206	\$277	\$414	\$0	\$237	\$0	\$279
<b>Nov - Dec</b>									
# Donors	2,738	807	335	252	140	134	101	82	67
# Gifts	5,651	2,484	1,389	1,287	900	963	844	764	727
Avg # Gifts Per Donor	2.1	3.1	4.1	5.1	6.4	7.2	8.4	9.3	10.9
Revenue	\$333,349	\$162,658	\$89,578	\$93,469	\$95,559	\$131,566	\$100,944	\$56,877	\$123,741
Avg Gift Amt	\$59	\$65	\$64	\$73	\$106	\$137	\$120	\$74	\$170
Avg Revenue Per Donor	\$122	\$202	\$267	\$371	\$683	\$982	\$999	\$694	\$1,847

# **Analytical Considerations**

## **Time Of Year Donors Give**

This page looks at the donors who have given consecutively over many years and shows when exactly during the year that they are known to give. There are two important considerations about the information on this page that you need to keep in mind. First, it includes only those donors who have given consecutively without any gaps in their annual giving history. For example, this page would include a donor who had given every year for the past five years but would not include a donor who had given in years one, three and five only.

Second, it includes only those donors who consistently give at the same time every year. For example, it would include a donor who consistently gave either in November or December without exception but would not include a donor who gave in November or December and also in January or February.

This information can be used to be selective about when appeals are sent to specific donors. If a donor is known to give only in November and December without exception then it is possible to segment the delivery of your appeals so that these donors only receive appeals during that time frame. This allows the organization to save resources by not sending appeals during specific times of the year to donors who will not respond to them.

Donor specific information pertaining to "time of year" gifts can be found in the action reports located on the disk at the back of this report.

# Segmentation Report

## 0 to 6 Month

1 Gift 0 - 9.99	124
2+ Gifts 0 - 9.99	6
1 Gift 10 - 14.99	448
2+ Gifts 10 - 14.99	14
1 Gift 15 - 24.99	3051
2+ Gifts 15 - 24.99	121
1 Gift 25 - 49.99	2420
2+ Gifts 25 - 49.99	1530
1 Gift 50 - 99.99	1613
2+ Gifts 50 - 99.9	4541
1 Gift 100 - 499.99	1214
2+ Gifts 100 - 499.99	14626
1 Gift 500 +	99
2+ Gifts 500 +	5057

## 7 to 12 Months

1 Gift 0 - 9.99	4
2+ Gifts 0 - 9.99	1
1 Gift 10 - 14.99	19
2+ Gifts 10 - 14.99	3
1 Gift 15 - 24.99	80
2+ Gifts 15 - 24.99	22
1 Gift 25 - 49.9	105
2+ Gifts 25 - 49.99	235
1 Gift 50 - 99.99	91
2+ Gifts 50 -99.99	443
1 Gift 100 - 499.99	104
2+ Gifts 100 - 499.99	1017
1 Gift 500 +	17
2+ Gifts 500	248

## 13 to 18 Month

1 Gift 0 - 9.99	42
2+ Gifts 0 - 9.99	3
1 Gift 10 - 14.99	144
2+ Gifts 10 - 14.99	3
1 Gift 15 - 24.99	1192
2+ Gifts 15 - 24.99	52
1 Gift 25 - 49.99	955
2+ Gifts 25 - 49.99	606
1 Gift 50 - 99.99	658
2+ Gifts 50 - 99.99	1155
1 Gift 100 - 499.99	592
2+ Gifts 100 - 499.99	1735
1 Gift 500 +	52
2+ Gifts 500 +	259

## 19 to 24 Month

1 Gift 0 - 9.99	9
2+ Gifts 0 - 9.99	3
1 Gift 10 - 14.99	24
2+ Gifts 10 - 14.99	1
1 Gift 15 - 24.99	94
2+ Gifts 15 - 24.99	20
1 Gift 25 - 49.99	153
2+ Gifts 25 - 49.99	152
1 Gift 50 - 99.99	128
2+ Gifts 50 - 99.99	282
1 Gift 100 - 499.99	139
2+ Gifts 100 - 499.99	415
1 Gift 500 +	25
2+ Gifts 500	45

## 25 to 36 Months

1 Gift 0 - 9.99	97
2+ Gifts 0 - 9.99	2
1 Gift 10 - 14.99	341
2+ Gifts 10 - 14.99	4
1 Gift 15 - 24.99	1954
2+ gifts 15 - 24.99	36
1 Gift 25 - 49.99	1762
2+ Gifts 25 - 49.99	310
1 Gift 50 - 99.99	1085
2+ Gifts 50 - 99.99	482
1 Gift 100 - 499.99	911
2+ Gifts 100 - 499.99	517
1 Gift 500 +	73
2+ Gifts 500 +	61

**Total Number Of Donors** 53826

## Analytical Considerations

### Important Note About This Segmentation

This is not a mailing segmentation. This segmentation is meant for cultivation purposes. A mailing segmentation is concerned with the most recent gift information from a donor. A cultivation segmentation is concerned with a giving profile that spans a 36 month period. Why the difference?

The reason for the difference is best illustrated using the following example.

#### Mailing Segmentation

Donor "A" gives three gifts over the last 36 months.

Year 1: \$200

Year 2: \$200

Year 3: \$100 (most recent year, most recent gift)

A mailing segmentation looks only at the most recent gift and the number of gifts given in that time frame.

Using this example, Donor "A" would have a segmentation code of "0 to 6 months, 1 gift, \$50 to \$100"

#### Cultivation Segmentation

Donor "A" gives three gifts over the last 36 months.

Year 1: \$200

Year 2: \$200

Year 3: \$100 (most recent year, most recent gift)

A cultivation segmentation looks at all the gifts in the last 36 months, using the most recent for time period and the total amount and number of gifts as the segment reference.

Using this example, Donor "A" would have a segmentation code of "0 to 6 months, 2+ gifts, \$500+"

When making cultivation decisions about donors and allocating scarce resources an organization might choose to situate Donor "A" further down a priority list if they use a mailing segmentation which shows this donor as a single gift, \$50 to \$100 level donor.

In actual fact, over the last 36 months, the donor has shown themselves to be a multiple gift \$500 plus donor. This donor would normally end up much higher on a priority list for cultivation purposes. Since the purpose of this report is to assist organizations in making cultivation choices we have used a cultivation segmentation for this part of the report.

A segmented table of your donors is included in the action reports that are found on the disk at the back of this report. To assist you in actively targeting specific donor segments this same information has been provided in a Microsoft Access database or Excel Spreadsheet also included on the disk at the back of this report.

## **Revenue Generating Opportunities**

We have taken your actual results and used those to suggest what might be achievable targets based on existing donors and their giving history.

### **Two important notes.**

- 1) It is important to note that the suggested targets below cannot reflect changing fundraising strategies or future economic realities. As such these targets should be considered examples of how you can work with the information in this report. These examples should be used with the caveat that past performance cannot always accurately predict future results.
- 2) When looking at averages we on occasion use an “average of the averages” as found on the pages in your report. While an “average of averages” does not yield a perfectly accurate number it does in our opinion yield a number which is accurate enough to guide this kind of general planning exercise. As year one of your report is considered a base year we do not include it in our averages that appear below. Whenever we have used an average of averages we have denoted this with an “\*”.

### **Donor Renewal Rates (page 14)**

Your average\* donor renewal rate was 70.3 percent.

If your organization were able to increase your average donor renewal rate by just 5 percent this year, then based on last years performance of your donors your revenue could increase by as much as \$193,447.22.

The suggested percentage increase in average donor renewal rate is less than the largest renewal rate for a single year already achieved by your organization (as shown on page 14 of your report). As such it is our opinion that this increase could be achievable by employing donor cultivation and stewardship strategies. We give an example of how to zero in on potential candidates for such strategies in the next section. In planning for the next year this could be one area where revenues might be improved.

If you would like to discuss possible cultivation and stewardship strategies that could be effective in your situation please feel free to contact us.

### **Donor Attrition Rates (page 16)**

In calculating the average donor attrition rate we have removed the most current three years from the calculation. We do this because in our opinion donors who have given a gift in the most recent 36 months are still active and should not be counted as lapsed. Donors

who fall within this 36 month time frame are examined separately with an eye to those who may be starting to lapse. We look at donors who are starting to lapse in the next section.

Your average\* donor attrition rate was 18 percent.

If your organization were able to reduce donor attrition by just 5 percent this year, then based on the past performance of your donors your revenue could increase by as much as \$125,543.00.

It is our opinion that this decrease in attrition could be achievable by employing donor cultivation and stewardship strategies.

In the electronic files that come with this report you will find four tables that list your lapsed donors (in both Excel and Access formats). The donors listed in these four tables are divided into those who gave 10 plus gifts, 3 to 9 gifts, 2 gifts and one gift. In planning for the next year, these tables can be used to contact donors who have lapsed, with the goal of reactivating them. Donors who are lapsed, but who once gave 10 plus gifts or 3 to 9 gifts have already demonstrated a high level of commitment to your organization and they would be the best candidates for reactivation.

Reactivating just 1863 of these lapsed donors through donor cultivation strategies would achieve the above stated revenue goal. If you review your donor reactivation rate and look at the “# Reactivated” section on page 18 of your report you will see that this goal is not far different from what you are already achieving.

If you would like to discuss possible cultivation and stewardship strategies that could be effective in reactivating lapsed donors please feel free to contact us

### **Donors Who Are Starting To Lapse (Gift Recency and Frequency Last 36 Months - page 36)**

As mentioned above, reducing attrition and increasing donor renewal rates can have a lasting impact on revenues.

On pages 36 to 39 of your report is information pertaining to donor giving patterns for the most recent 36 months. On these pages you will see three time periods that show when your donors last gave (0 to 12 months, 13 to 24 months and 25 to 36 months). We consider the donors in the 25 to 36 month time period to be in the process of lapsing. You will notice on page 36 of your report that there are 7635 donors who fall into this category. You will also notice that some of these donors have given multiple gifts.

If your organization were able to renew the interest of just 5 percent of the donors in the “25 to 36 month” time frame, then based on past performance your revenue could increase by as much as \$30,506.52.

On pages 38 and 39 of your report you will see a further examination of donors who have given larger amounts but whose last gift was more than 24 months ago. These would be the donors you might wish to target first.

In the electronic files that come with this report you will find 12 tables that document the giving frequency of your donors in the last 36 months (in both Excel and Access formats). In planning for next year, the four tables that document donors in the 25 to 36 month time period can help you focus on those who are beginning to lapse. Renewing the interest of donors before they lapse further can help increase annual revenue.

If you would like to discuss possible cultivation and stewardship strategies that could be effective in targeting donors who are starting to lapse please feel free to contact us.

### **New Donor Acquisition (page 8)**

In order to understand the full importance of new donor acquisition in the context of your results we first need to take a quick look at the percent of donors that you lose every year.

If you look on page 16 of your report (Donor Attrition) you will see in the row called “Percent Of Active File” the percentage of donors who stopped giving to you in the years covered by this report. You will see that the smallest percentage who stopped giving in any given year was 16 and the largest percentage was 20. The overall average\* percent that stopped giving was 18.

It is not unusual to find that the average attrition rate can be 25 percent or greater. This is why new donor acquisition is so important. If you fail to acquire new donors at a number greater than your attrition rate, then your donor file will shrink and your revenue will be less every year.

On page 8 of your report you will see your new donor acquisition history. If you look at the bottom portion of the table called “Percentage Of New Donors Who Continue To Give” you will see in the column called “Gave In Year 2” the percentage of new donors who gave in the year after their first gift. It is not unusual to find that 50% or more of new donors do not give again in subsequent years. Your average\* percentage of new donors who gave a gift in year two was 54.

Because so many of your new donors do not continue to give to you it is even more important that you give attention to acquisition and second gift conversion strategies. On page 10 of your report you will see your second gift conversion history. This page shows how successful you have been in convincing your new donors to give more than one gift. If you look at the row called “Percent Who Gave Second Gift” you will see the percent of new donors from each year who gave a second gift. It is not unusual to see larger percentages the further back in time

you look. This reflects the fact that, over time, greater numbers from each new donor group will eventually give a second gift.

To see how each of these new donor groups have performed over time you can look at page 28 of your report. Here you will find the Long Term Donor Value for each of the years in this report. Each year shows the donors who were acquired in that year and the total amount of revenue they contributed to your organization. In the row called "LTDV (Avg Rev Per Donor)" you will see the average total revenue each donor has contributed to your organization over the years.

While each year shows the long term donor value for each new group of donors, it is worth noting that your overall average long term donor value (including year 1 the base year) is \$353.41.

This is important to know as you consider your strategies for new donor acquisition (see page 30 of report for budget considerations). If you look again at page 2 of your report and consider that the overall lifetime average value of each new donor is approximately \$353.41 then you will also see that increasing the number of new donors you acquire could have a substantial impact on revenue.

If your organization were to allocate resources to increase your new donor acquisition by five percent over last year, then based on past results the resulting long term revenue gain could be as much as \$144,173.61.

In the electronic files that come with this report you will find a table that documents the new donors you recently acquired (in both Excel and Access formats). Contacting these donors personally or employing other second gift conversion strategies can improve the number of new donors who give a second gift and remain committed to your organization. Each new donor who remains committed has a potential lifetime donor value of \$353.41.

If you would like to discuss possible new donor acquisition strategies that could be effective in in your situation please feel free to contact us.

### **Donor Momentum (Donors Who Gave More, The Same Or Less - page 20)**

Included in the electronic files that come with this report are two important tables. The first table shows the number of active donors who increased their giving every year for the past three years. There were 4204 donors who increased their giving to your organization every year for the past three years. The total additional revenue amounted to \$566,050.50.

The second table documents the number of active donors who have reduced their giving every year for the past three years. There were 1593 donors who decreased their giving to you in this way and the total lost revenue from this group amounted to \$178,437.60.

The donors who have given more every year for the past three years could be signalling that their interest in your organization is growing and that they are capable of increased levels of giving. They would make excellent candidates for monthly giving, major giving and legacy giving programs.

The donors who have given less every year for the past three years could be signalling that their interest in your organization is beginning to decrease. Contacting these donors to renew their interest in your organization could keep them from lapsing and possibly reverse the decrease their giving level.

If you would like to discuss possible donor cultivation strategies that could be effective with both these groups of donors please feel free to contact us.

### **Top Donors (Active Donors Pyramid - page 34)**

On page 34 of your report you will find donor graphs that show your top 2 percent, 8 percent, 20 percent and 70 percent donors. There are three donor graphs on that page that cover the last 36 months.

Included in the electronic files that come with this report are tables that list your top donors as shown in the graphs on page 34. It would be important to note that there were 745 people who were your top 2 percent donors. They gave your organization 25.65 percent of the total revenue you received in the last twelve months. They gave a total of \$2,921,531.52.

There were also 2980 donors who were your top 8 percent of donors. They gave 26.12 percent of the total revenue you received in the last twelve months. They gave a total of \$2,975,496.08.

Combined, these donors gave 51.77 percent of the revenue your organization received in the last twelve months. These are the donors who can be considered most important to your organization and are ideal candidates for major giving and legacy giving programs.

A list of these donors is found in the electronic files that were included with your report. If you would like to discuss possible donor cultivation strategies that could be effective with both these groups of donors please feel free to contact us.

### **Gift Size (page 4)**

On page 4 of your report you will see a table that lists the size of gift your donors have given to you. Included in the electronic files that come with this report are three tables that show the cumulative gift size for donors who were active in the last 36 months. The first table lists gift

gift sizes from donors who gave \$1 to \$50. The second table lists donors who gave \$51 to \$500 and the third table lists donors who gave \$501 or more.

In planning for the next year it would be worthwhile reviewing these tables as some donors who give smaller one time gifts can, over a 36 month period, end up giving a substantial amount of revenue to your organization. These donors are not always recognized as major contributors because the revenue arrives in smaller increments, yet their giving patterns over a three year period reflect an ability to support your organization that can be substantial. Reviewing the table of donors who gave \$501 would be especially worthwhile in this regard.

If you would like to discuss possible donor cultivation strategies that could be effective with these three groups of donors please feel free to contact us.

### **Consecutive Years Giving History (page 41)**

Included in the electronic files that come with this report there are four tables that list the number of consecutive years your donors have given to you. On page 41 of your report you will see that there are donors who have given to you consecutively for many years. You will notice that there were 11490 donors who have given to you between 5 and 10 years consecutively.

Donors who have given to you for 5 years or more are ideal candidates for monthly giving and legacy giving programs. Donor recognition strategies would be important for donors who have remained loyal for many consecutive years. In planning for the next year it would be worthwhile reviewing the table “Consecutive Giving All Donors” that is included in the electronic files attached to this report. These donors will be some of your most loyal supporters and can be considered for special projects and other giving programs that recognize their commitment to your organization.

If you would like to discuss possible donor cultivation strategies that could be effective with this loyal group of donors please feel free to contact us.

### **Donor Segmentation (page 45)**

Included in the electronic files that come with this report is a table that segments your donors. It is important to note that this is a “cultivation” segmentation and not a “mailing” segmentation. The difference between these two versions of segmentation is documented on page 46 of your report.

If you are interested in obtaining a mailing segmentation based on the results of your report please feel free to contact us.

The table in the electronic file called “Donor Segmentation” shows in detail the different categories of giving for donors who have been active in the last 36 months. You will see on page 45 that donors are listed by gift size, number of gifts and how recently the gift was given.

This table can be very useful when planning campaigns for the next year. It can assist you in determining which donors will be most likely to give in response to an ask and which donors might be least likely to give. Donors who have given larger amounts in the 0 to 6 month and 7 to 12 month time frame have indicated that they are actively engaged and committed to the work of your organization. These are donors who could be receptive to special project or invitations to become monthly donors. Those within these two time frames who fall in the 2 plus gifts \$500 plus giving category would be ideal candidates to approach for major gift programs.

Those who are in the 25 to 36 month time frame are least likely to give in response to an ask and could be targeted with donor reactivation strategies so as to keep them from completely lapsing. Donors in 25 to 36 month time frame and who also fall in the 2 plus gifts \$500 plus giving category would be especially important donors to contact.

If you would like to discuss possible donor cultivation strategies that could be effective with all your different segmented categories of donors please feel free to contact us.

## Summary

The goals set out above are based on the past performance of existing donors and your existing new donor acquisition strategies. In our opinion, the goals as stated above are achievable given similar conditions to those that have existed in the past for your organization. Were you to achieve the above stated goals then the increase in revenue for your organization would look like this.

Potential Revenue From Donor Renewal	\$193,447.22
Potential Revenue From Donor Attrition	\$125,543.00
Potential Revenue From Donors Starting To Lapse	\$30,506.52
Potential LTDV Of 5 Percent Increase Of New Donors	\$144,173.61
Total	<hr/> \$493,670.35

In addition to the revenue shown in the table above, we believe that there are opportunities to increase revenue from monthly giving, major gift and legacy giving programs. If you would like to discuss strategies that could be effective in achieving these goals please feel free to contact us.

# Appeal Summary and Action Report

## Appendix

Your action reports and appeal summaries can be found on your thumb drive which is located at the back of this report. The 39 action reports identify the donors you need to work with and the actions you can take to increase gift levels and build donor loyalty.

The appeal summary reports list the different appeals that your organization has undertaken during the time period covered by this report. Each appeal is shown along with number of gifts and revenue received from each appeal. Appeals are organized by month starting with earlier years.

These reports provide the ability to track specific appeals over the years to see how well they have performed in comparison to subsequent years. For example, an appeal that performed well one year might not perform well in subsequent years or vice versa. These reports allow for an assessment of each appeal over the years with a view to judging whether a specific appeal is still effective or whether it might be better deployed during another time of the year.

The appeal summary reports are divided into months of the year and each month displays all appeals deployed in that month for each year covered by this report.