



Bringing **clarity** and  
**certitude** to philanthropy

Fundraising Effectiveness Project 2023 Review

**Sector Trends and What To Do About Them**

# Your presenters



**Ben Miller, MS**

SVP of Data Science and Analytics, Bonterra  
Chair, FEP Steering Committee



**Scott R. Lange**

President Visionary Philanthropic Consulting  
Treasurer, FEP Steering Committee

# Topics for Today

- What is the Fundraising Effectiveness Project?
- 2023 The Year in Fundraising
  - Donation and Donor Growth
  - Retention
  - Other key findings
- The Fundraising Fitness Test
- How to use the data

# The Fundraising Effectiveness Project



**20,000+**  
organizations

## Data Providers:



## Data Reporting:





Levis Research  
Grants and  
Research

Part of  
AFP Foundation for  
Philanthropy

First Grant  
Awarded in 2021!

Ruth K. Hansen,  
Ph.D and Lauren  
Dula, Ph.D

*/*  
*Interaction of Gender and  
Personal Values in Donor  
Response to Appeals*

*More Grants and Research  
Every Year!*

GIG/FEP analysis reports, articles, etc., are available at:  
<https://afpglobal.org/FundraisingEffectivenessProject>



A screenshot of the Fundraising Effectiveness Project website homepage. The page features a navigation menu with links for 'About', 'FEP Reports', 'FEP Tools', 'FEP Resources', 'Latest FEP News', and 'Donors'. The main content area has a background image of a desk with an open notebook and a pair of glasses. The text on the page reads: 'The Fundraising Effectiveness Project' followed by 'Helping nonprofits increase giving at a faster pace by providing critical tools for tracking and evaluating their annual growth in giving.' The footer includes the project logo, a statement that the website is brought to you by the Association of Fundraising Professionals (AFP) Foundation for Philanthropy, and the AFP logo.

# Fundraising Trends 2023





# 2023 Change in Giving Overall Donations



~-2.8%

# Dollars by Donation Size:



**MICRO**  
(\$1 - \$100)

**-6.8%**  
YOY Change

**1.9%**  
% of total dollars



**SMALL**  
(\$101 - \$500)

**-4.0%**  
YOY Change

**5.4%**  
% of total dollars



**MIDSIZE**  
(\$501 - \$5K)

**-5.9%**  
YOY Change

**16.4%**  
% of total dollars



**MAJOR**  
(\$5K - \$50K)

**-7.1%**  
YOY Change

**25.2%**  
% of total dollars



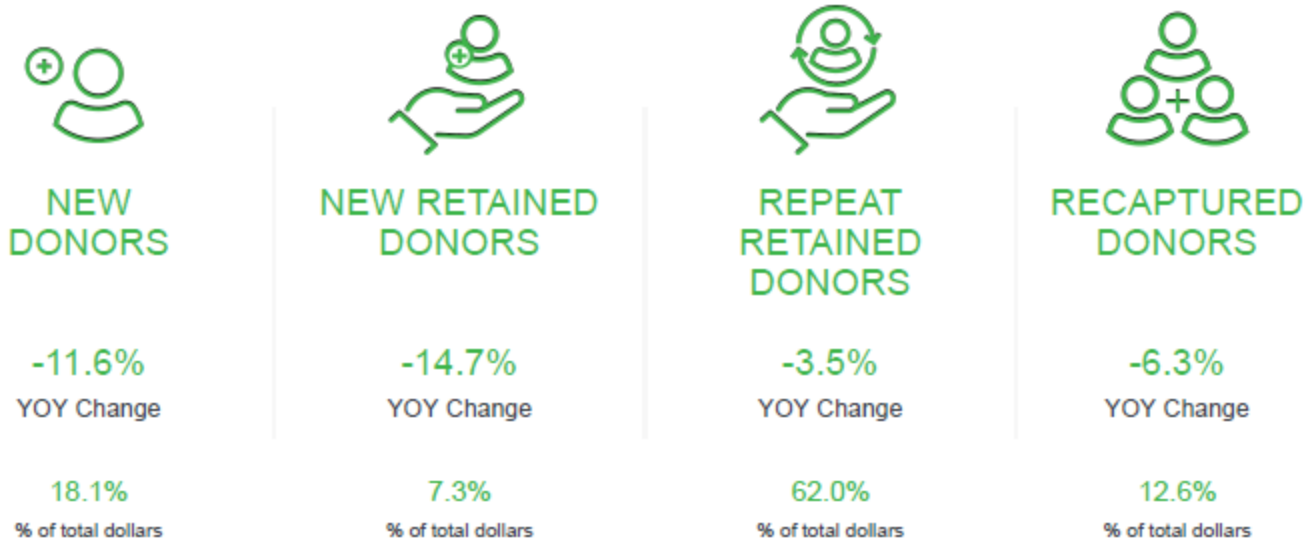
**SUPERSIZE**  
(\$50K+)

**-6.3%**  
YOY Change

**51.2%**  
% of total dollars

- Dollars donated decreased across donors of all sizes, dropping between -4.0% and -7.1%.
- Donors contributing over \$5K accounted for 76.4% of all dollars donated, despite only representing 2.6% of all donors.

# Dollars by Life Cycle



- New donor and New Retained donor groups saw double digit decreases in total dollars donated (-11.6% and -14.7%, respectively). When combined, these two donor groups accounted for 67.8% of the decrease in total dollars donated.

# Dollars by Donation Count



1 DONATION

-7.9%

YOY Change

41.8%

% of total dollars



2 DONATIONS

-6.4%

YOY Change

18.0%

% of total dollars



3-6 DONATIONS

-10.7%

YOY Change

19.5%

% of total dollars



7+ DONATIONS

2.0%

YOY Change

20.8%

% of total dollars

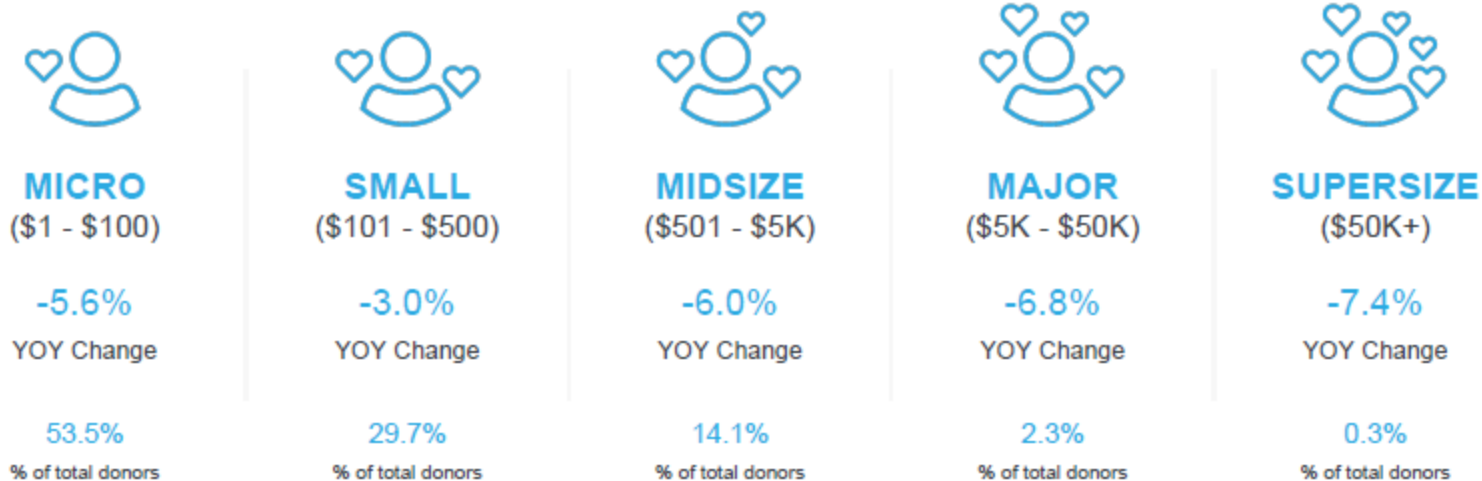
- Even though the one-time donors accounted for 70.6% of donors, they only contributed 41.8% of the dollars donated.
- 3-6 time donors gave -10.7% less compared to last year, experiencing the largest year-over-year decrease in dollars donated.
- Donations from the 7+ donor group were the only ones to increase in terms of total dollars donated. Combined with donors contributing 3-6 times per year, these groups accounted for only 16.3% of donors yet accounted for 40.3% of all donations.

# 2023 Change in Number of Donors



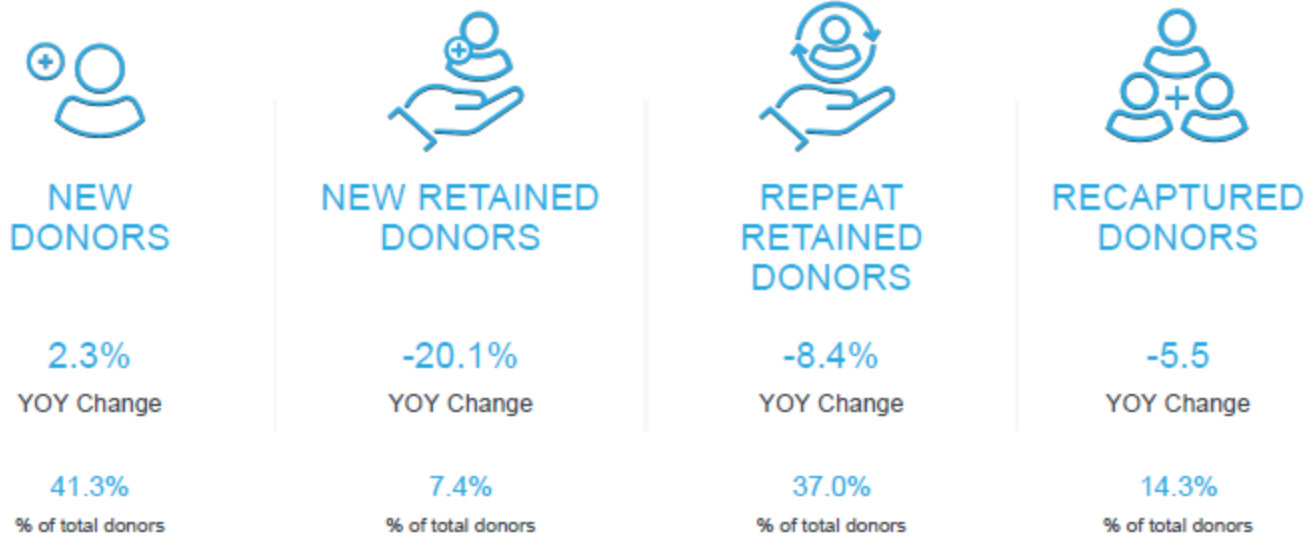
~ -3.4%

# Donors by Gift Size



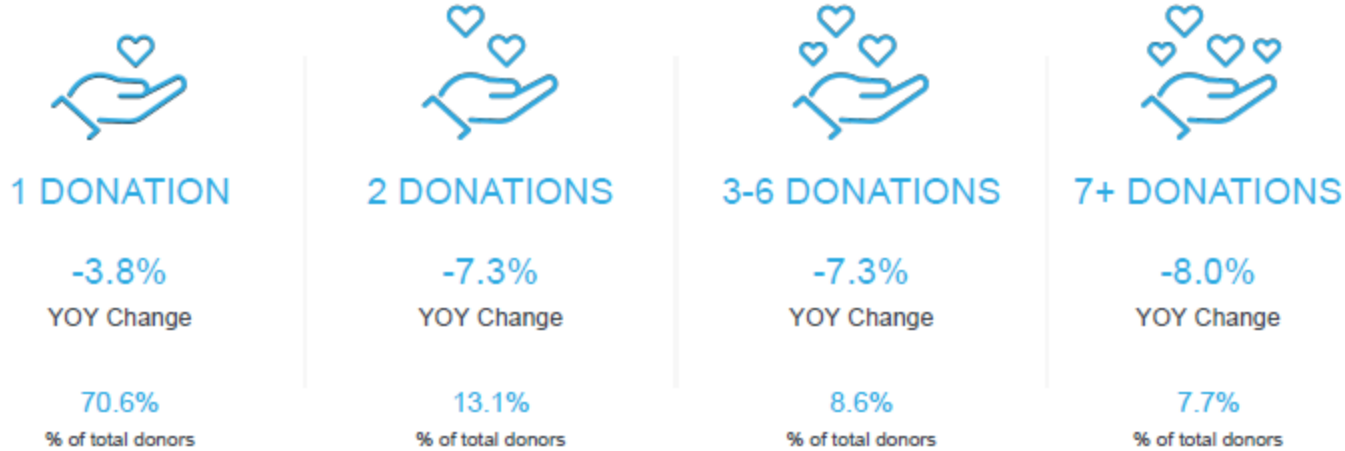
- The observed decrease in donors contributing less than \$500 was responsible for 79.3% of the overall decrease in donors.
- While the number of donors fell across donors of all sizes, supersize donors experienced the largest decrease, falling by 7.4% year-over-year.

# Donors by Life Cycle



- Repeat-retained donors constituted 37.0% of all donors, dropping from 41.9% in Q3.
- New-retained donors dropped by -20.1%, now representing just 7.4% of all donors, down from 8.5% in Q3.
- The number of new donors rose year-over-year, increasing by 2.3%. This is the first time new donor counts have risen since Q1 2021.

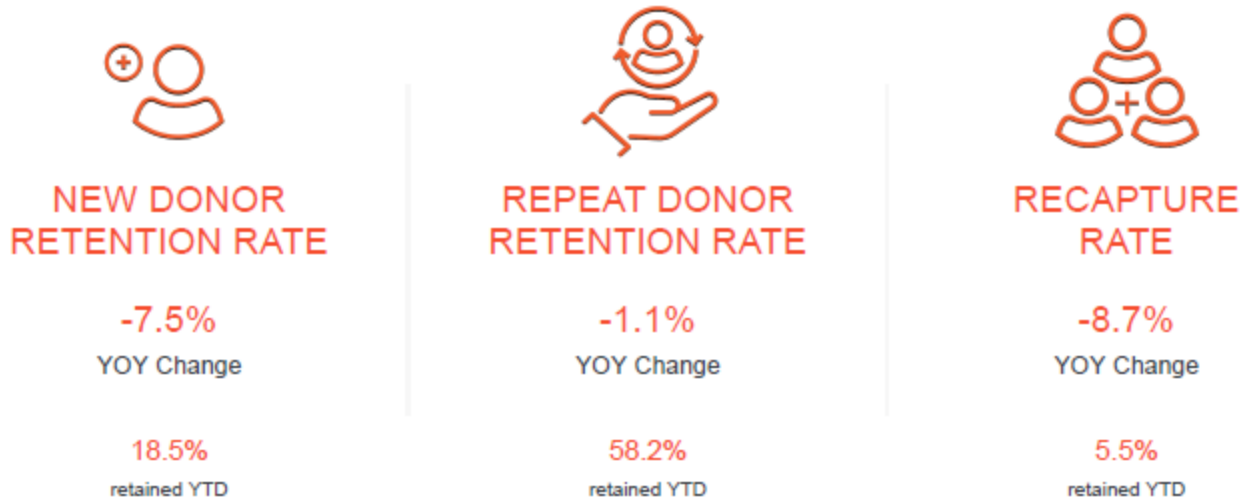
# Donors by Donation Count



- One-time donors were the largest donor group, accounting for 70.6% of donors.
- The number of donors who gave 2 or more gifts declined at nearly twice the rate as those giving 1 gift.

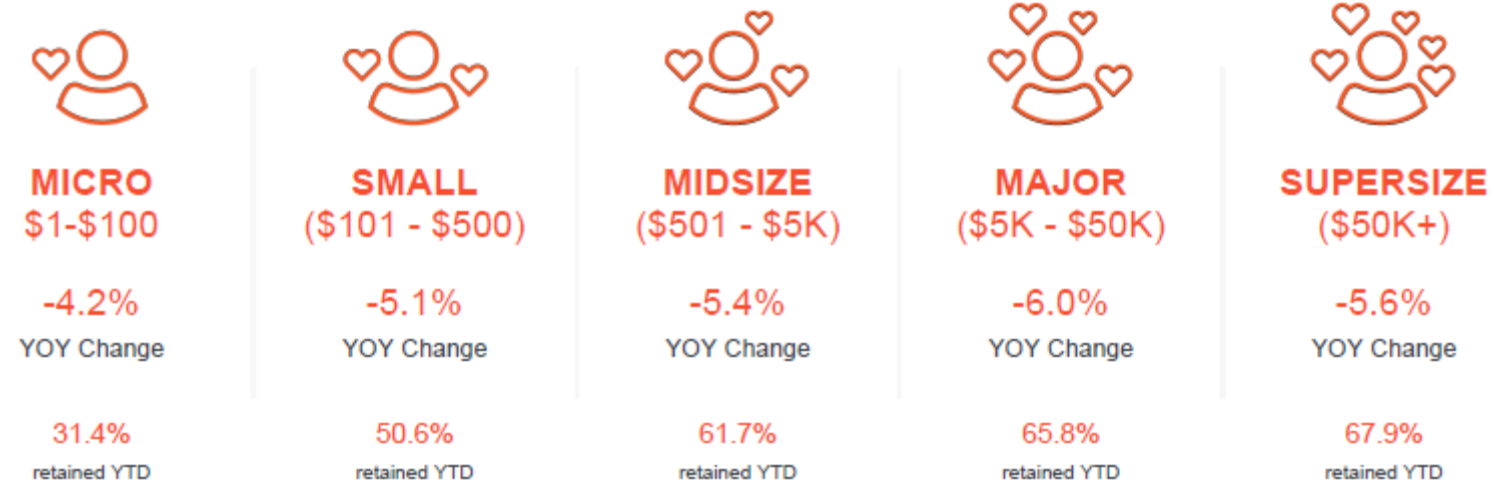


# Retention Rate by Donor Type



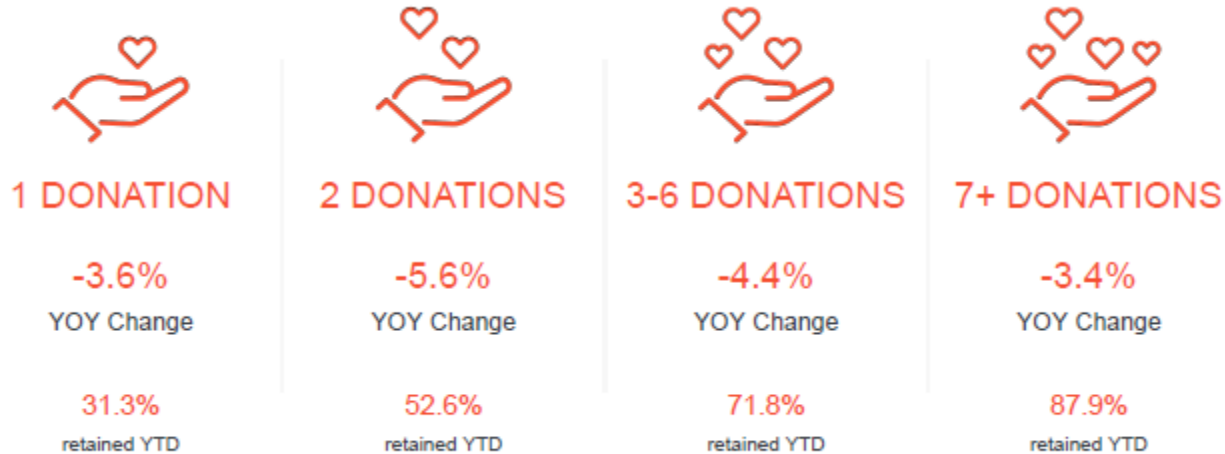
- Retention decreased across all donor types captured in Q4.
- While Repeat Donor Retention rates remained stable from 2022 to 2023, Recapture rates had the largest decrease of -8.7%.

# Retention Rate by Donor Size



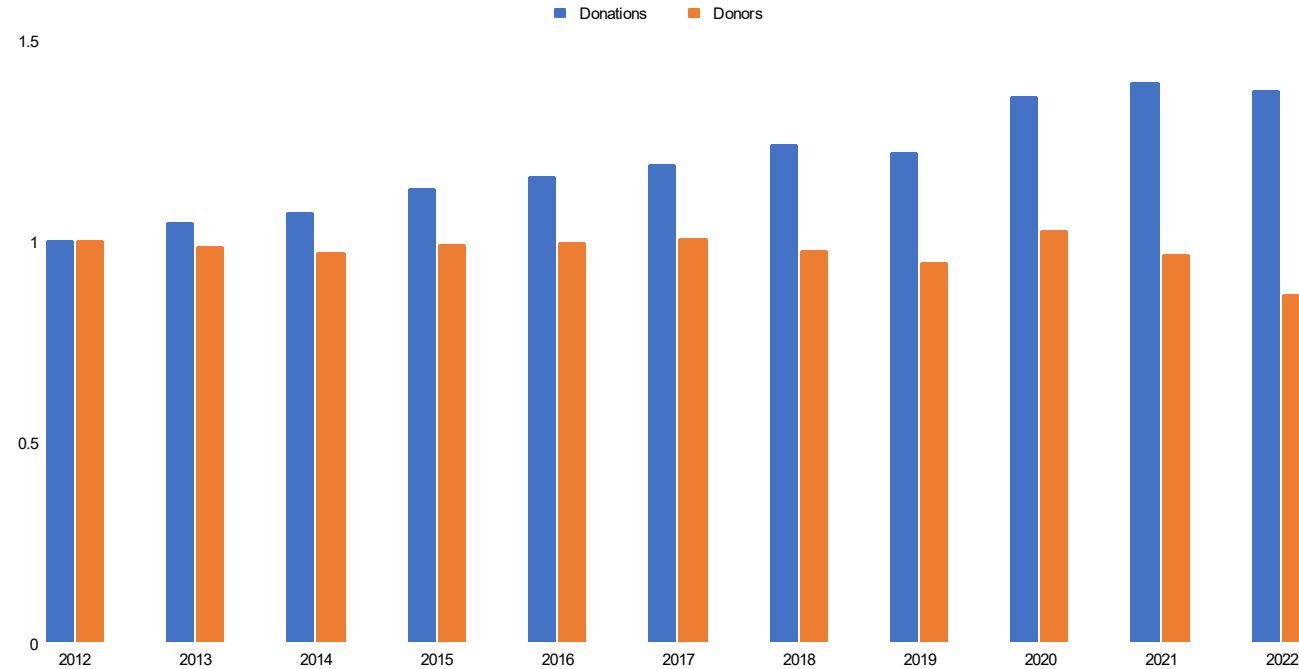
- All donor size segments had a lower retention rate compared to last year.
- Major and Supersize donors, which together constituted 76.4% of all dollars donated, suffered the biggest decreases, although these donors were the most likely to be retained year-over-year.

# Retention Rate by Donor Count



- Retention decreased across all donation count groups.
- Overall, the most active donors still had the highest retention rate.

## Long Term Trend in Dollars and Donors as a % of 2012 Levels



### Key Takeaways

There is a long-term trend of fewer donors donating more money

#### Contributing Factors:

- Continued widening of the wealth gap
- Continued Expansion of the number of nonprofits
- Expansion of ways to give
- Cost to acquire and retain donors has risen

# What size is your organization?

0% Avg  
-13% Med



<\$100K

-4% Avg  
-8% Med



\$100K-\$250K

-5% Avg  
-7% Med



\$250K-\$1Mil

7% Avg  
-7% Med



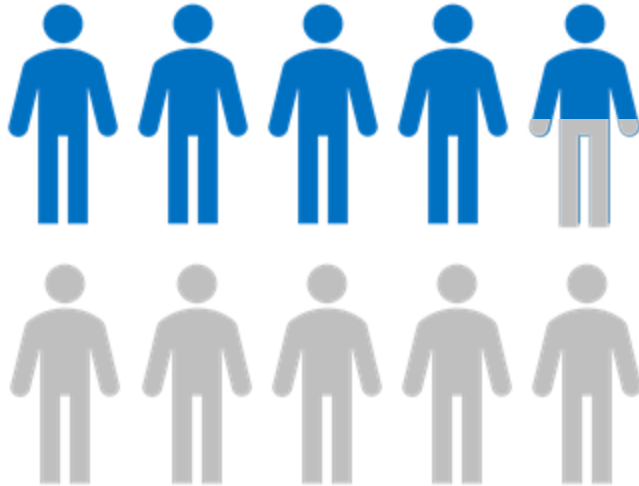
\$1Mil-\$5Mil

-6% Avg  
-5% Med



\$5Mil-\$25Mil

# 2023 Overall Donor Retention



42%



**-2.5%**

YOY Change

# New Donor Retention 2023



19%

↓ -8%  
YOY Change

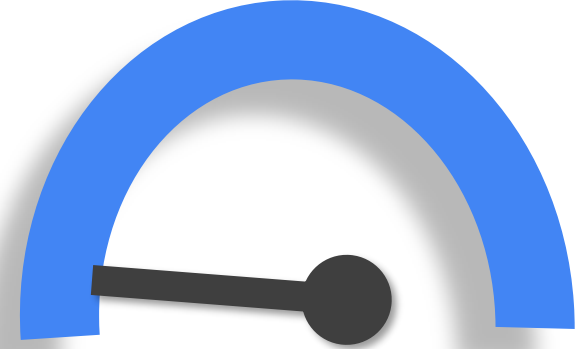
# Repeat Donor Retention 2023



58%

↓ -1%  
YOY Change

# Recapture Rate 2023



6%

↓ -9%  
YOY Change

# 2023 New Donor Acquisition

+2.3%





COME

2023  
Lapsed  
Donors  
Reactivated  
-5.5%

# Some Thoughts on the 2023 FEP Report Findings...

A Major FEP Premise!

Gains - Losses = Net Growth

Donors AND Dollars!

# Retention and the Leaky Bucket

**Donors that gave  
in 2022 AND in 2023**



# Retention and the Leaky Bucket

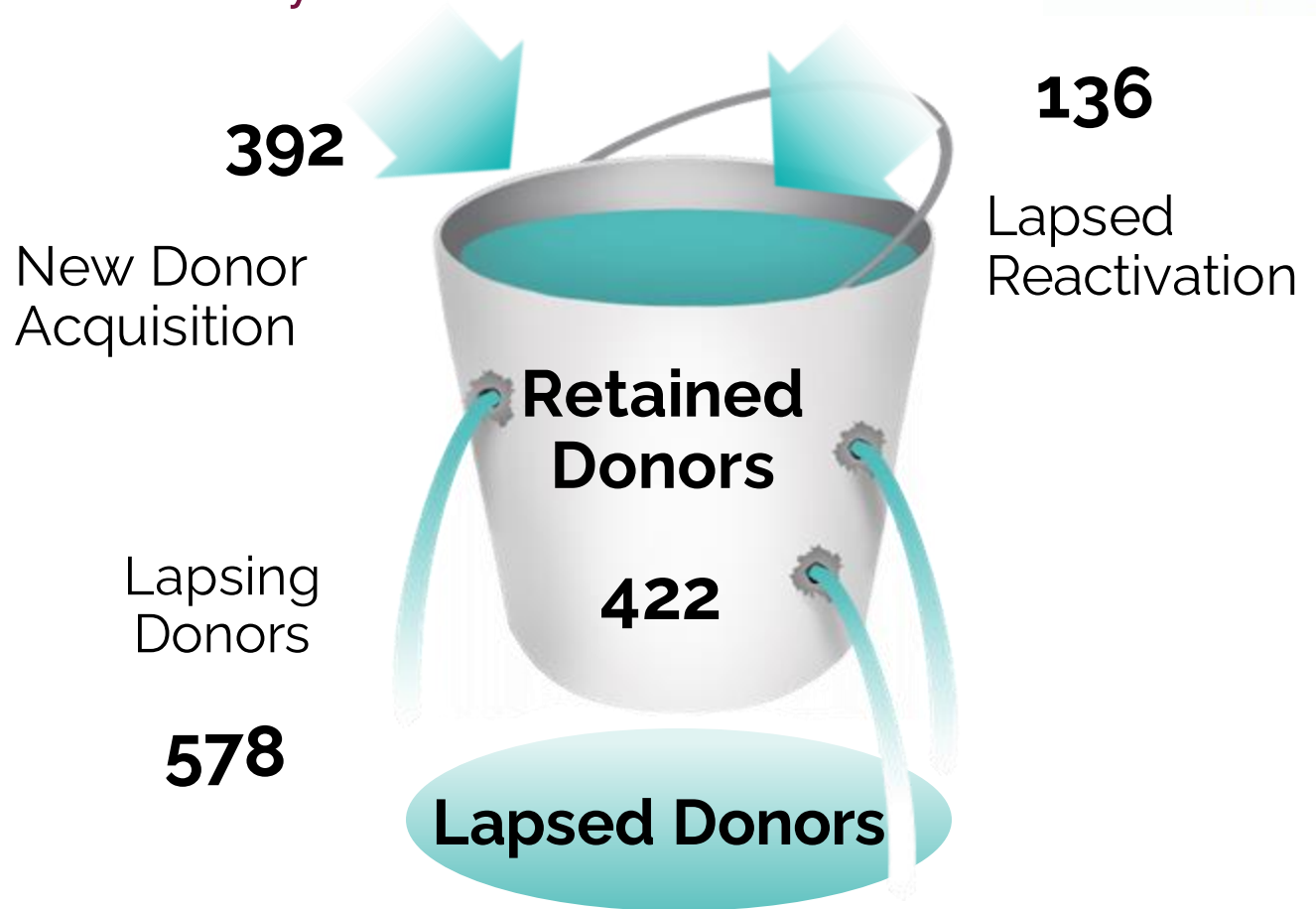
Donors that gave in  
2022 but  
NOT in 2023

Lapsing  
Donors

578



# Retention and the Leaky Bucket



# Retention and the Leaky Bucket

*Donors Gained*  
 $= 392 + 136$   
 $= 529$

*Donors Lost*  
 $= 578$

*Gain/Loss*  
 $+529 - 578$   
 $= -49/100 = -4.9\%$



## 2 Ways to Increase File Size

### Add more water

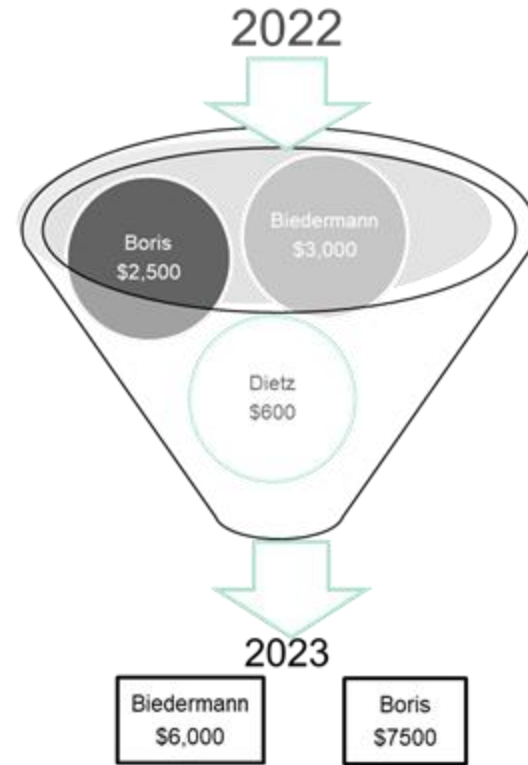
- Acquire more donors
- Reactivate more donors

### Decrease the size of holes

- Improve response / engagement

Another way to look at it!  
Understand the sector...  
and compare against...yourself!

- Donor Retention
- Gift Retention
- Upgrades
- Downgrades
- Lapsed Donors





# Fundraising Effectiveness Project

## Fundraising Fitness Test

# How does the Fundraising Fitness Test work?

SECURITY WARNING: Macros have been disabled. [Enable Content](#)

	A	B	C	D	E	F	G	H	I	J	K	L
358	100131	4/1/2020	3846									
359	100132	4/27/2021	65									
360	100133	4/14/2022	2000									
361	100133	6/17/2021	2000									
362	100134	4/14/2022	45									
363	100135	10/28/2020	7250									
364	100136	5/7/2018	25									
365	100137	4/14/2019	2500									
366	100138	6/30/2022	1500									
367	100139	10/31/2021	34.5									
368	100139	1/18/2021	34.5									
369	100139	6/6/2021	34.5									
370	100139	6/30/2021	34.5									
371	100139	8/10/2022	18.67									
372	100140	12/16/2022	1382									
373	100141	12/22/2021	100									
374	100142	8/24/2020	40000									
375	100142	12/15/2020	34500									
376	100142	8/1/2021	13653.64									
377	100142	2/2/2022	13750									
378	100142	4/27/2022	20000									
379	100142	8/12/2017	15000									

Navigation: Data | StepByStep | TOP Indicators | Income Summary | Pareto Principle | 6 Year Trends | Greenfield | Greenfield GIG | GainLoss | Year2Distrib | Comparison - FEP

**FEP Fundraising Fitness Test** 4/6/2018

See "All Indicators" worksheet for details & formulas by "Indicator Number"

12 ← Year-end month  
Year2: 2016  
Year1: 2015

**TOP Actionable Indicators**

Ind	Giving Level/Range						
No	Fundraising Performance Indicator	All Donors	Under \$100	\$100-\$249	\$250-\$999	\$1,000 - \$4,999	\$5,000 & Up
<b>Donor retention rate</b>							
1	New donor retention rate	27%	16%	32%	69%	73%	33%
2	Repeat donor retention rate	77%	56%	75%	87%	91%	89%
3	Overall donor retention rate	63%	37%	63%	86%	90%	86%
<b>Donor acquisition rate</b>							
5a	New donor acquisition rate	24%	45%	24%	7%	5%	14%
6a	Repeat donor re-acquisition rate	14%	19%	16%	8%	10%	6%
6	Overall donor acquisition rate	39%	64%	40%	15%	15%	20%
<b>Donor gains, losses &amp; net</b>							
5	Donor gains	1,166	606	393	126	32	10
7	Donor losses	1108	600	369	120	22	7
5a	Net gain in donors	58	5	34	6	10	3
12	Net gain in donors (%)	5%	1%	9%	5%	31%	30%
<b>Number of donors</b>							
13	Overall donors retained	1,918	346	623	708	198	43
16	Percent of Year2 donors by range	100%	31%	33%	27%	7%	2%
<b>Amount of gifts</b>							
16	Percent of Year2 gifts by range	100%	3%	10%	23%	24%	40%
18	Average gift size in Year2	\$ 399	\$ 37	\$ 115	\$ 344	\$ 1,289	\$ 9,324
<b>Dollar gains, losses &amp; net</b>							
20	Dollar gains	\$ 514,690	\$ 24,372	\$ 60,579	\$ 78,056	\$ 80,115	\$ 271,568
22	Dollar losses	\$ 474,882	\$ 23,103	\$ 51,207	\$ 64,483	\$ 54,124	\$ 281,966
27	Net gain in dollars (%)	8%	5%	15%	17%	32%	-4%
<b>Growth in giving (GIG)</b>							
38	Overall rate of growth in gifts	3%	4%	9%	5%	10%	-2%
<b>Growth in donors</b>							
43	Overall rate of growth in donors	2%	1%	3%	1%	5%	6%
<b>Distribution of Year2 donors &amp; gifts:</b>							

Ready

**FEP Fundraising Fitness Test** 4/6/2018

12 ← Year-end month  
Year2: 2016  
Year1: 2015

**Six Year Trend Analysis**

Fundraising Performance Indicator	2011	2012	2013	2014	2015	2016	6-Year YTD	ROG
36 Total gifts in Year1	\$ 667,917	\$ 818,368	\$ 738,495	\$ 967,703	\$ 981,302	\$ 1,189,944		
37 Total gifts in Year2	\$ 818,368	\$ 738,495	\$ 967,703	\$ 981,302	\$ 1,189,944	\$ 1,229,752		84%
40 Total donors in Year1	2,267	2,505	2,768	2,541	3,023	3,026		
41 Total donors in Year2	2,505	2,768	2,541	3,023	3,026	3,084		36%
76a Number of gifts in Year2	10,314	10,962	11,207	12,425	12,791	13,207		
76b Average frequency in Year2	4.12	3.96	4.41	4.11	4.23	4.28		
76c Average amount in Year2	\$ 79.35	\$ 67.37	\$ 86.35	\$ 78.98	\$ 93.03	\$ 93.11		
72 Monthly donors in Year2 ****	608	628	657	683	700	716		
75 Monthly-donor gifts in Year2	\$ 356,365	\$ 353,440	\$ 391,406	\$ 431,082	\$ 453,532	\$ 473,325		
*** Net change in monthly donors *		103%	105%	104%	102%	102%		
5a New donors in Year2	904	1,010	658	967	823	734		
5b Reactivated donors in Year2	254	275	311	407	358	432		
2a Repeat donors in Year2	1,347	1,483	1,572	1,648	1,845	1,918		
5b Upgraded in Year2	642	583	688	600	737	738		
5b Same in Year2	293	299	385	456	534	679		
6a Downgraded in Year2	412	601	499	693	574	601		
7 Lapsed donors	920	1,022	1,196	892	1,178	1,108		
7a New in Year1	606	618	725	437	674	697		
7b Repeat in Year1	315	404	471	456	504	611		

Ready

### FEP Fundraising Fitness Test

12 ← Year-end month

This year: 2013  
Last year: 2012  
2 years ago: 2011

#### Overall 3-Year "Growth in Giving" Analysis

	2 Years ago	Last year	Last year	This year	This year	Growth
Rate of Growth						
Rate of-Year cum Growth						
Rate of-Year cum Growth						

	2011	2012	2013
5 Donors of record (end of year)	5,065	5,918	8,822
2 Donors participating	2,298	2,507	3,279
3 Percent participation (2/1)	45%	42%	40%
4 Gross revenue	\$ 667,898	\$ 818,249	\$ 1,032,877
5 Average gift size (4/2)	\$ 294	\$ 328	\$ 356

\* Source: J.K. Greenfield, "Judging for Fundraising and Evaluating Performance", Ch. 17 in: Achieving Excellence in Fundraising, Third Edition, Jossey-Bass, A Wiley Imprint, 2011, p. 267

### Fundraising Income Summary

Using Mail, email and Website Gift Transaction Data By Giving Level/Range

Year2: 2013  
Year1: 2012

Fundraising Performance Indicator	Giving Level/Range					
	All Donors	Under \$100	\$100 to \$249	\$250 to \$999	\$1,000 to \$4,999	\$5,000 & Up
Total gifts in Year1	\$ 818,249	\$ 31,740	\$ 94,530	\$ 211,296	\$ 559,037	\$ 321,246
Total gifts in Year2	\$ 1,032,877	\$ 38,156	\$ 101,784	\$ 234,960	\$ 571,228	\$ 396,853
Total donors in Year1	2,507	884	793	660	130	
Total donors in Year2	2,776	1,106	843	664	131	
Number of gifts in Year2	10,946	1,434	3,826	5,108	1,066	
Average frequency in Year2	3.95	1.30	3.59	7.69	8.06	
Average amount in Year2	\$ 67.29	\$ 27.31	\$ 32.83	\$ 48.90	\$ 162.15	\$ 558.34

### FEP Fundraising Fitness Test

12 ← Year-end month

Year2: 2013  
Year1: 2012

#### Distribution of Donors and Gifts in Year2

##### By Gain/Loss Category

Gain/Loss Category	2013 Donors	2013 Donor Percent	2013 Gifts	Gift Percent
New	1,012	36.5%	\$ 133,838	14.1%
Recapture	275	9.9%	\$ 34,477	7.4%
Upgrade	182	6.6%	\$ 307,294	41.7%
Same	299	10.8%	\$ 54,201	7.3%
Downgrade	602	21.7%	\$ 187,366	25.9%
Total	2,776	100.0%	\$ 947,276	100.0%

### FEP Fundraising Fitness Test

12 ← Year-end month

Year2: 2013  
Year1: 2012

#### Gain/Loss Growth-in-Giving Performance Report for 2013

Based: Total all donors

Gain/Loss Category	2012	2013	Delta	Delta %
Donors	2,507	2,776	269	10.7%
Gifts	10,946	12,877	1,931	17.7%
Revenue	\$ 818,249	\$ 1,032,877	\$ 214,628	26.2%
Subtotal gains	\$ 667,898	\$ 818,249	\$ 150,351	22.5%
Subtotal losses	\$ 150,351	\$ 214,628	\$ 64,277	42.8%
Net gain/loss	\$ 517,547	\$ 603,621	\$ 86,074	16.6%

### FEP Fundraising Fitness Test

12 ← Year-end month

This year: 2013

#### 3-Year "Growth in Giving" Analysis by Gift Range

3-Year Cumulative Growth in Giving Category	Gift Range					
	All Donors	Under \$100	\$100 to \$249	\$250 to \$999	\$1,000 to \$4,999	\$5,000 & up
Donors of record	38%	48%	34%	21%	12%	14%
Donors participating	22%	40%	19%	8%	4%	-6%
Gross revenue	10%	42%	24%	25%	25%	-23%
Average gift size	-10%	1%	5%	25%	21%	-64%

### FEP Fundraising Fitness Test

12 ← Year-end month

Year2: 2013  
Year1: 2012

#### What Previous Year's Donors Did in Year2 2013

##### By Gain/Loss Category

Gain/Loss Category	Donors	Donor Percent	Gifts	Gift Percent
Upgrade	582	21.2%	\$ 307,294	41.7%
Same	299	10.8%	\$ 54,201	7.3%
Downgrade	602	21.8%	\$ 187,366	25.9%
Total	1,483	53.8%	\$ 548,861	74.9%

### FEP Fundraising Fitness Test

12 ← Year-end month

Year2: 2013  
Year1: 2012

#### Fundraising Performance Indicators

Using Gift Transaction Data by Giving Level/Range

Fundraising Performance Indicator	Giving Level/Range					
	All Donors	Under \$100	\$100 to \$249	\$250 to \$999	\$1,000 to \$4,999	\$5,000 & up
Number of donors	2,776	1,106	843	664	131	
Overall donors retained	1,483	381	300	549	115	22
Year1 total donors	2,507	884	793	660	130	26
Year2 total donors	2,776	1,106	843	664	131	26
% Percent of Year2 donors by range	100%	40%	30%	24%	9%	1%
Cum. % of Year2 donors - low to high	40%	79%	84%	99%	100%	
Cum. % of Year2 donors - high to low	100%	89%	30%	8%	1%	

### FEP Fundraising Fitness Test

12 ← Year-end month

Year2: 2013  
Year1: 2012

#### Key Indicators

##### Pareto Principle - 80/20 rule

Fundraising Performance Indicator	Giving Level/Range					
	All Donors	Under \$100	\$100 to \$249	\$250 to \$999	\$1,000 to \$4,999	\$5,000 & up
Amount of gifts	\$ 1,032,877	\$ 38,156	\$ 101,784	\$ 234,960	\$ 571,228	\$ 396,853
% Percent of Year2 gifts by range	100%	3%	14%	22%	27%	25%
Cum. % of Year2 gifts - low to high	3%	19%	51%	74%	100%	
Cum. % of Year2 gifts - high to low	100%	95%	81%	49%	25%	

### Comparative Gain/Loss Growth-in-Giving for 2013

Comparison with 2010 Fundraising Effectiveness Survey Results (column 6%)

Year	Amount of Gifts		Gain (Loss) (\$)	Gain (Loss) Ratio (C-B)/(A-B)	YOUR Gain (Loss) Ratio (C-B)/(A-B)	FEP Survey Ratio (C-B)/(A-B)	Difference (E-D)	Objective
	Year 1 (A)	Year 2 (B)						
13 Total	n/a	133,838	133,838	98.4%	28.2%	7.0%	increase	
14 Recapture	n/a	34,477	34,477	0.0%	13.2%	-6.0%	increase	
15 Upgrade	183,332	307,294	123,962	35.1%	23.5%	8.3%	increase	
16 Subtotal gains	183,332	495,609	312,277	38.2%	69.9%	22.7%	Maximize	
17 Same	54,201	54,201	n/a	0.0%	0.0%	0.0%	Upgrade	
18 Downgrade	314,030	187,866	(126,664)	-15.0%	-21.6%	-6.1%	Reduce	
19 Lapsed new	103,250	n/a	(103,250)	-12.0%	-13.2%	-0.6%	Reduce	
21 Lapsed repeat	162,936	n/a	(162,936)	-19.9%	-19.2%	-3.2%	Reduce	
22 Subtotal losses	560,116	197,866	(362,850)	-48.9%	-21.5%	-9.9%	Minimize	
23 Total - gifts	\$ 818,249	\$ 1,032,877	\$ 214,628	26.2%	9.3%	19.2%	net gain/loss	

**Caution: if you enter data in this worksheet, you will destroy the formula cells.**

**Exception: Enter FEP Survey data in yellow hi-lighted fields.**

### Number of Donors

Year	Number of Donors		Gain (Loss)	Gain (Loss) Ratio (C-B)/(A-B)	YOUR Gain (Loss) Ratio (C-B)/(A-B)	FEP Survey Ratio (C-B)/(A-B)	Difference (E-D)	Objective
	Year 1 (A)	Year 2 (B)						
2012	2,507	2,776	269	10.7%	10.7%	0.0%	increase	
2013	2,776	2,776	0	0.0%	0.0%	0.0%	maintain	

# Practical Matters

- Using reports for benchmarking
- Identifying areas for improvement or growth

<b>12</b>	<b>&lt;-- Year-end month</b>	
	This year:	<b>2023</b>
	Last year:	<b>2022</b>
	2 years ago:	<b>2021</b>

## Overall 3-Year "Growth in Giving" Analysis\*

Fundraising Performance Indicator			Rate of Growth			Rate of Growth	3-Year cum
	<u>2 Years ago</u>	<u>Last year</u>	<u>Last year</u>	<u>This year</u>	<u>This year</u>	<u>Rate of Growth</u>	
1 Donors of record (end of year)	50,912	62,324	22%	96,501	55%	90%	
2 Donors participating	21,237	17,895	-16%	43,278	142%	104%	
3 Percent participation (2/1)	42%	29%	-31%	45%	56%	8%	
4 Gross revenue	\$ 3,598,951	\$ 3,151,886	-12%	\$ 8,130,575	158%	126%	
5 Average gift size (4/2)	\$ 169	\$ 176	4%	\$ 188	7%	11%	

## What Previous Year's Donors Did in Year2: 2023 By Gain/Loss Category

Gain/Loss Category	Donors	Donor Percent
	<b>Number of Donors</b>	
Upgrade	2,456	13.7%
Same	1,448	8.1%
Downgrade	1,103	6.2%
Repeat	5,007	28.0%
Lapsed new	9,635	53.8%
Lapsed repeat	3,253	18.2%
Attrition	12,888	72.0%
<b>Total</b>	<b>17,895</b>	<b>100.0%</b>

	Gifts	Gift Percent
	<b>Amount of Gifts</b>	
Gave more in Year2	\$ 518,612	16.5%
Gave the same in Year2	\$ 279,443	8.9%
Gave less in Year2	\$ 435,331	13.8%
Gave in Year2	\$ 1,233,386	39.1%
Did not give in Year2	\$ 1,261,749	40.0%
Did not give in Year2	\$ 656,751	20.8%
Did not give in Year2	\$ 1,918,501	60.9%
	\$ 3,151,886	100.0%

# Comparison with National Average

----- Amount of Gifts -----				----- Growth-in-Giving Performance Indicators -----			
Gain(Loss) Category	Year 1 <u>2022</u>	Year 2 <u>2023</u>	Gains (Losses)	YOUR Gain (Loss) Ratio	FEP Survey Ratios(*)	Difference	Objective
<b>Gains</b>							
New		5,502,469	5,502,469	174.6%	24.2%	-150.4%	increase
Recapture		991,946	991,946	31.5%	13.2%	-18.3%	increase
Upgrade	<u>518,612</u>	<u>1,123,377</u>	<u>604,765</u>	<u>19.2%</u>	<u>23.5%</u>	<u>4.3%</u>	increase
<b>Subtotal gains</b>	<u>518,612</u>	<u>7,617,792</u>	<u>7,099,180</u>	<u>225.2%</u>	<u>60.9%</u>	<u>-164.4%</u>	<b>Maximize</b>
<b>Same</b>	279,443	279,443	-			0.0%	Upgrade
<b>Losses</b>							
Downgrade	435,331	233,340	(201,991)	-6.4%	-21.6%	-15.2%	Reduce
Lapsed new	1,261,749		(1,261,749)	-40.0%	-13.2%	26.8%	Reduce
Lapsed repeat	<u>656,751</u>		<u>(656,751)</u>	<u>-20.8%</u>	<u>-16.7%</u>	<u>4.1%</u>	Reduce
<b>Subtotal losses</b>	<u>2,353,831</u>	<u>233,340</u>	<u>(2,120,491)</u>	<u>-67.3%</u>	<u>-51.5%</u>	<u>15.7%</u>	<b>Minimize</b>
<b>Total - gifts</b>	<b>\$ 3,151,886</b>	<b>\$ 8,130,575</b>	<b>\$ 4,978,688</b>	<b>158.0%</b>	<b>9.3%</b>	<b>-148.6%</b>	Net gain(loss)



# Comparison with National Average

----- Number of Donors -----				----- Growth-in-Giving Performance Indicators -----			
Gain(Loss) Category	Year 1 <u>2022</u>	Year 2 <u>2023</u>	Gains (Losses)	YOUR Gain (Loss) Ratio	FEP Survey Ratios(*)	Difference	Objective
<b>Gains</b>							
New		34,177	34,177	191.0%	46.2%	-144.8%	increase
Recapture		4,094	4,094	22.9%	15.2%	-7.7%	increase
Upgrade	2,456	2,456	-		0.0%		increase
<b>Subtotal gains</b>	<u>2,456</u>	<u>40,727</u>	<u>38,271</u>	<b>213.9%</b>	<b>61.4%</b>	<b>-152.4%</b>	<b>Maximize</b>
<b>Same</b>	1,448	1,448	-		0.0%		Upgrade
<b>Losses</b>							
Downgrade	1,103	1,103	-		0.0%		Reduce
Lapsed new	9,635		(9,635)	-53.8%	-31.7%	22.1%	Reduce
Lapsed repeat	3,253		(3,253)	-18.2%	-21.6%	-3.4%	Reduce
<b>Subtotal losses</b>	<u>13,991</u>	<u>1,103</u>	<u>(12,888)</u>	<b>-72.0%</b>	<b>-53.3%</b>	<b>18.7%</b>	<b>Minimize</b>
<b>Total - donors</b>	<u>17,895</u>	<u>43,278</u>	<u>\$ 25,383</u>	<b>141.8%</b>	<b>8.1%</b>	<b>-133.7%</b>	Net gain(loss)

# Thank You!

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