

Key Performance Indicators Worksheets

Donations					
Total Donations					
Type	\$ Range	Actual Last Year	Goal This Year	% Change	Actual This Year
Planned Gifts	N/A	\$ 48,976	\$ 50,000	2%	\$ 25,000
Major	\$5,000+	\$ 150,000	\$ 200,000	33%	\$ 225,000
Corporate	\$5k - \$50K	\$ 10,000	\$ 50,000	400%	\$ 52,000
Large	\$501 - \$4,999	\$ 90,000	\$ 100,000	11%	\$ 104,587
Small	<\$500	\$ 180,000	\$ 200,000	11%	\$ 198,760
Matching	N/A	\$ 4,000	\$ 10,000	150%	\$ 11,456
TOTAL		\$ 482,976	\$ 610,000	26%	\$ 616,803
Total Donations Progress Tracking Q1					
Type	Quarter 1 Target	Quarter 1 Actual	% of Quarter Goal	% of Total Goal	Modification Needed?
Major	\$ 25,000	\$ 35,000	140%	70%	N
Corporate	\$ 25,000	-	0%	0%	Y
Large	\$ 10,000	\$ 20,000	200%	40%	N
Small	\$ 20,000	\$ 22,000	110%	22%	N
Matching	\$ 1,000	\$ 980	98%	0%	N
Total Donations Progress Tracking Q2					
Type	Quarter 1 Target	Quarter 1 Actual	% of Quarter Goal	% of Total Goal	Modification Needed?
Major					
Corporate					
Large					
Small					
Matching					
Total Donations Progress Tracking Q3					
Type	Quarter 1 Target	Quarter 1 Actual	% of Quarter Goal	% of Total Goal	Modification Needed?
Major					
Corporate					
Large					
Small					
Matching					

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Donors						
Average Gift (AKA Revenue Per Donor)						
Average Gift Last Year	Goal Average Gift This Year	Actual Total Donations This Year	Actual Total Number of Donations This Year	Actual Average Gift = Total \$/Total Number	Average Gift % Change Last Year to This Year	Average Gift Delta from Goal
\$ 30	\$ 35	\$ 100,000	2,987	\$ 33	12%	-4%
First Time vs. Repeat Donor Revenue						
Type	Actual Last Year	Goal This Year	Goal % change (TY-LY)/LY	Actual This Year	Actual % change (TY-LY)/LY	
First Time Donors	\$ 20,947	\$ 30,000	43%	\$ 29,475	41%	
Repeat Donors	\$ 290,876	\$ 350,000	20%	\$ 350,786	21%	
Recurring Donors	\$ 49,712	\$ 75,000	51%	\$ 77,111	55%	
Donor Retention/Churn						
Donor Retention Rate Last Year	(DLY) Donors who gave last year	(RD) Donors who gave last year <u>and</u> this year	Donor Retention Rate this year % RD/DLY	Donor Churn Rate this year 100% - Donor Retention%	Donor Retention Rate % change	Donor Churn Rate % change
52%	4982	3675	74%	26%	22%	-22%
Constituent Category Growth Rates						
Type	# Last Year	# Goal This Year	Goal % change (TY-LY)/LY	# Actual This Year	Actual % change (TY-LY)/LY	
Legacy Members	24	60	150%	62	158%	
Major Donors	100	125	25%	126	26%	
Corporate	8	15	88%	9	13%	
Recurring Donors	39	100	156%	114	192%	
Donors	2987	3500	17%	3451	16%	
Members	366	400	9%	433	18%	
Event Attendees	241	275	14%	280	16%	

Key Performance Indicators Worksheets

Donors (continued)						
Giving Frequency						
Last Year Giving Frequency	Goal This Year Giving Frequency	Total Number of Donations	Total Number of Donors	Frequency = Total #\$/Total Donors	Frequency % Change Last Year to This Year	Frequency Delta from Goal
1.2	1.4	10,000	6,000	1.67	39%	19%
Pledge Fulfillment						
Pledge Fulfillment Rate Last Year	Goal Pledge Fulfillment Rate This Year	Total Number of Pledge Payments Due	Total Number of Pledge Payments Made	Actual Pledge Fulfillment Rate = Payments Made/ Payments Due		
80%	90%	300	290	97%		
Online Giving vs. Offline Giving						
Type	Total Last Year	Goal Total This Year	Actual Total This Year	% of Giving Last Year = Online/Total or Offline/Total	% of Giving Goal This Year	% of Giving Actual This Year
Online	\$ 400,000	\$ 450,000	\$ 435,000	98%	90%	89%
Offline	\$ 10,000	\$ 50,000	\$ 56,000	2%	10%	11%
Donor Lifetime Value						
	Average Donor Lifespan in Years	Average Donation \$ Amount	Average Annual Frequency of Donations	DLV = Lifespan x Avg \$ x Frequency	DLV % Change Last Year to This Year	DLV Delta from Goal
Last Year	5.5	\$ 30.00	1.20	\$ 198.00		
Goal This Year	6	\$ 35.00	1.40	\$ 294.00		
Actual This Year	6	\$ 33.00	1.67	\$ 330.66	67%	12%

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Donors (continued)						
Matching Gifts						
Matching Gifts Received Last Year	Percentage of Gifts Matched Last Year	Goal Matching Gifts This Year	Goal Percentage of Matching Gifts This Year	Actual Matching Gifts This Year	Actual Percentage of Matching Gifts This Year = Matching Gifts/Total Gifts	Matching Gifts Delta from Goal
\$ 4,000	1%	\$ 10,000	2%	\$ 11,456	2%	15%
New Donor Acquisition Rate						
Time frame	New Donor Acquisition Rate Last Year	New Donor Acquisition Goal	New Donors This Quarter	Total Donors This Quarter = New + Existing	New Donor Acquisition Rate = New Donors/Total Donors	Acquisition Rate Delta from Goal
Quarter 1		5%	98	5,439	2%	-64%
Quarter 2		11%	604	4,987	12%	10%
Quarter 3		6%	88	2,398	4%	-39%
Quarter 4		20%	2,135	12,098	18%	-12%
Annually	7%	15%	2,925	24,922	12%	-22%

Key Performance Indicators Worksheets

Fundraising Costs						
New Donor Acquisition Cost						
Activity	New Donor Acquisition Costs Per Donor Last Year	New Donor Acquisition Costs Per Donor Goal	Actual Total Acquisition Costs This Quarter	New Donors	Acquisition Cost Per Donor=Costs /Donors	Acquisition Cost Delta from Goal
Quarter 1		\$1.00	\$ 106	98	\$ 1.08	8%
Quarter 2		\$1.00	\$ 578	604	\$ 0.96	-4%
Quarter 3		\$1.00	\$ 134	88	\$ 1.52	52%
Quarter 4		\$1.00	\$ 1,876	2,135	\$ 0.88	-12%
Annually	\$ 1.25	\$1.00	\$ 2,694	2,925	\$ 0.92	-8%
Fundraising ROI						
Activity	ROI Last Year	ROI Goal This Year	Fundraising Costs This Year	Revenue This Year	ROI Actual This Year = (Raised-Cost)/Cost	ROI Delta from Goal
Golf Event	150%	175%	\$ 83,465	\$ 239,763	187%	7%
Gala Event	75%	80%	\$ 147,655	\$ 268,760	82%	3%
5K Run & P2P	New	50%	\$ 45,987	\$ 73,469	60%	20%
Annual Appeal	2100%	2300%	\$ 8,000	\$ 194,765	2335%	2%
Major Gifts	1400%	1500%	\$ 80,000	\$ 1,250,000	1463%	-3%
Special Appeal	1459%	1600%	\$ 7,500	\$ 122,765	1537%	-4%
Online Campaigns	13%	19%	\$ 3,000	\$ 3,545	18%	-4%
TOTAL		130%	375,607	\$ 2,153,067	473%	264%
Cost Per Dollar Raised						
Cost Per Dollar Raised Last Year	Goal Cost Per Dollar Raised This Year	% Change Last Year to Goal This Year	Total Fundraising Revenue This Year	Total Fundraising Costs This Year	Cost Per Dollar Raised This Year	Delta from Goal
\$ 0.20	\$ 0.15	-25%	\$ 2,153,067	\$ 375,607	\$ 0.17	16%

Key Performance Indicators Worksheets

Major Gifts & Moves Management						
Moves Management Lifecycle Migration						
Stage	Constituents in this Stage Year Begin	Goal Constituents in this Stage Year End	Actual Constituents in this Stage Year End	Constituents Dropped From Program in this Stage	Delta From Goal = Actual/Goal	Percentage Dropped = Dropped/Actual
Identify	5	30	30	1	100%	3%
Qualify	0	30	23	12	77%	52%
Cultivate	18	50	52	6	104%	12%
Solicit	9	20	24	4	120%	17%
Steward	40	65	66	2	102%	3%
Donor Engagement						
Stage	Constituents in this Stage Year Begin	Goal Constituents in this Stage Year End	Actual Constituents in this Stage Year Begin	Constituents Dropped From Program in this Stage	Delta From Goal = Actual/Goal	Percentage Dropped = Dropped/Actual
Inspire	0	5000	3657	0	73%	0%
Connect	0	3000	2978	90	99%	3%
Learn	18	600	687	14	115%	2%
Engage	9	100	106	22	106%	21%
invite	350	550	700	150	127%	21%
Appreciate	2500	2800	2789	1000	100%	36%
Motivate	67	100	119	4	119%	3%
Success Rates						
Activity	Number of Requests Last Year	Success Rate Last Year	Goal Success Rate This Year	Requests This Year	Number Funded This Year	Success Rate = Number Funded/ Number of Requests
Grants	15	20%	50%	16	9	56%
Sponsorships	10	60%	75%	12	9	75%
Major Gifts	18	50%	90%	25	20	80%
Planned Gifts	4	100%	75%	10	8	80%
Recurring	400	12%	20%	1000	140	14%

Key Performance Indicators Worksheets

Email & Text Marketing						
Email Open Rates						
	Last Year Average Open Rate	Goal This Year Open Rate	Number of Emails Sent	Number Opened	Open Rate = Number Opened/ Number Sent	Delta From Goal
Email 1	36%	40%	5230	2654	51%	27%
Email 2	36%	40%	5489	3268	60%	49%
Email 3	36%	40%	5389	1987	37%	-8%
Email 4	36%	40%	5286	3561	67%	68%
Email 5	36%	40%	5318	2888	54%	36%
Email 6	36%	40%	5455	1765	32%	-19%
Email Opens Click Rates						
	Last Year Average Click Rate	Goal This Year Open Click Rate	Number of Emails Opened	Number of Clicks	Click Rate = Number of Clicks/ Number Sent	Delta From Goal
Email 1	16%	20%	2654	558	21%	5%
Email 2	16%	20%	3268	1234	38%	89%
Email 3	16%	20%	1987	247	12%	-38%
Email 4	16%	20%	3561	745	21%	5%
Email 5	16%	20%	2888	611	21%	6%
Email 6	16%	20%	1765	346	20%	-2%
Email Monetization Rates						
	Last Year Average Monetization Rate	Goal This Year Monetization Rate	Number of Clicks	Number of Transactions	Open Rate = Number of Transactions/ Number Sent	Delta From Goal
Email 1	10%	15%	558	83	15%	-1%
Email 2	10%	15%	1234	227	18%	23%
Email 3	10%	15%	247	45	18%	21%
Email 4	10%	15%	745	106	14%	-5%
Email 5	10%	15%	611	67	11%	-27%
Email 6	10%	15%	346	37	11%	-29%

Key Performance Indicators Worksheets

Email & Text Marketing (continued)						
Email Unsubscribe Rates						
	Last Year Average Unsubscribe Rate	Goal This Year Unsubscribe Rate	Number of Emails Sent	Number Unsubscribed	Unsubscribe Rate = Number Unsubscribed/ Number Sent	Delta From Goal
Email 1	5.00%	1.00%	5230	67	1.28%	28%
Email 2	5.00%	1.00%	5489	28	0.51%	-49%
Email 3	5.00%	1.00%	5389	137	2.54%	154%
Email 4	5.00%	1.00%	5286	88	1.66%	66%
Email 5	5.00%	1.00%	5318	198	3.72%	272%
Email 6	5.00%	1.00%	5455	45	0.82%	-18%
Text Response Rates						
	Last Year Average Response Rate	Goal This Year Response Rate	Number of Texts Sent	Number of Responses	Response Rate = Number Opened/ Number Sent	Delta From Goal
Text 1	10%	15%	558	83	15%	-1%
Text 2	10%	15%	1234	227	18%	23%
Text 3	10%	15%	247	45	18%	21%
Text 4	10%	15%	745	106	14%	-5%
Text 5	10%	15%	611	67	11%	-27%
Text 6	10%	15%	346	37	11%	-29%

Key Performance Indicators Worksheets

Website & Social Media Analytics						
Website Analytics						
Metric	Last Year LY	Goal This Year GTY	% Change From Previous = (GTY-LY)/LY	Actual 6 Months	Actual Final AF	Final Delta from Goal = (AF-GTY)/GTY
Bounce Rate	69%	55%	-20%	62%	59%	7%
Session Duration (minutes)	0.45	1.5	233%	0.58	1.2	-20%
Pages per Session	1.4	2	43%	1.5	2.1	5%
Visitors	18132	20000	10%	10456	22346	12%
Email Sign Ups	60	250	317%	90	241	-4%
Conversions	1%	2%	100%	1%	1.30%	-35%
Donations	355	500	41%	398	648	30%
Other CTAs						
Social Media Analytics						
Metric	Last Year LY	Goal This Year GTY	% Change From Previous = (GTY-LY)/LY	Actual 6 Months	Actual Final AF	Final Delta from Goal = (AF-GTY)/GTY
Instagram						
Followers	1243	2000	61%	1456	2244	12%
Engagement	0.50%	2%	300%	2.30%	3.35%	68%
Conversions	0.08%	1.00%	1150%	0.50%	0.89%	-11%
X (Formerly Twitter)						
Followers	509	800	57%	511	563	-30%
Engagement	0.50%	1.50%	200%	0.70%	0.80%	-47%
Conversions	0.01%	1.00%	9900%	0.25%	0.35%	-65%
Facebook						
Followers	5789	10000	73%	6587	9865	-1%
Engagement	3%	5%	67%	3.30%	5.10%	2%
Conversions	1.00%	2.00%	100%	1.60%	2.40%	20%