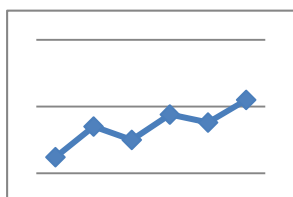
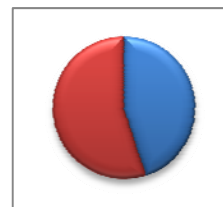


Healthy Metrics... Good Figures to Know

The following are a series of figures that need to be checked regularly. At a minimum, they should be reviewed annually and compared to prior years' nonprofit standards and trends within your own organization. These results should be checked at the close of each fiscal year in advance of any major strategy decisions that need to be made.

Retention Rate

- Numbers Needed
 - ✓ Number of Donors That Gave Last Year (A)
 - ✓ Number of Donors That Gave Last Year and Current Year (B)
- The Formula: B/A

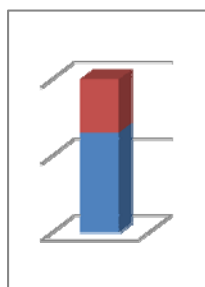
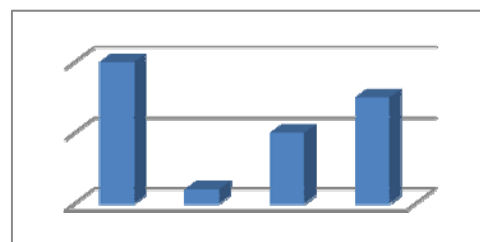


Acquisition Rate

- Numbers Needed
 - ✓ Number of Donors That Gave Their First Gift in the Current Year (A)
 - ✓ Number of Donors That Gave in Current Year – All Donors (B)
- The Formula: A/B

Lapsed Recaptured

- Numbers Needed
 - ✓ Number of Donors That Gave Their First Gift Two Years Ago – Not Current Year and Not Last Year (A)
 - ✓ Number of Donors That Gave Their First Gift Two Years Ago and Did Not Give Last Year, but Did Give Current Year (B)
- The Formula: B/A



Gap Analysis

- Numbers Needed
 - ✓ Number of Donors That Gave Last Year (A)
 - ✓ Number of Donors That Gave Last Year and Current Year (B)
 - ✓ Number of Donors That Gave Their First Gift in the Current Year (C)
 - ✓ Number of Donors That Gave Their First Gift Two Years Ago and Did Not Give Last Year, but Did Give Current Year (D)
- The Formula: $(B+C+D)/A$

Pyramid Distribution

- The Steps:
 - ✓ Summarize by Donor the Total Giving of Current Year
 - ✓ Count the Number of Donors Within Each of These Buckets
 - ✓ Summarize the Total Dollars Raised Within Each of These Buckets
 - ✓ Identify Which Groups Have the Most Donors and/or Most Revenue

