

Donor Health Examination

You can give your donor records a basic health examination, and test the functioning of your donor database at the same time. How easily can you answer the questions in each category? More importantly, do the answers paint a picture of good fundraising health or are there areas of concern that warrant further examination and action?

As you gather your information, consider using the calendar year even if your fiscal year is different. Donors don't usually think in terms of your fiscal year, they give in a calendar year.

New Donors (first gift ever)

- Number of new donors each year during the past 5 years - any trends?
- Total number of new donors during the past 5 years each year, divided by all donors each of those years - any trends?
- Number of new donors in the past 5 years that currently give (Example: Number of donors who made first gift in any of years 2008-2011 that gave in 2012) - are you keeping your new donors?

Current Donors (not new that year)

- Number of current donors (not new that year) in each year for the past 5 years - any trends?
- Last year's donors (not new that year), divided by every donor who ever made a gift (except last year's new donors) - is it greater than 10%?
- Number of last year's donors (not new that year) that did not give in the previous year, divided by the number of all donors last year - what might cause sporadic giving?

Lifetime Giving (all cumulative giving)

- How many donors have lifetime giving of \$1,000+? - any opportunities? - what percentage are current donors?
- What is the average lifetime giving of current donors with a first gift date of greater than 5 years?

Average Gift & Largest Gift

- What is the average gift amount for current donors (not new that year) each year for the past 5 years - any trends? [you may need to remove exceptional gifts/outliers]
- How many of all donors in the past 5 years had a largest gift amount (the largest gift they ever made across all giving) of greater than \$50/\$100/\$1,000 [pick a significant number for you]? Are they current donors?

Once you get started asking questions, you might not want to stop! Try to stay focused on your most important goals for the year and keep a list of what you want to tackle in the future.

Note: If you don't have five years of gift records, that's okay. Five years is usually a good thermometer, but use whatever you have!