

Fundraising Effectiveness Plug-In for The Raiser's Edge

Fundraising Effectiveness Project

Period 1 Start: 01/01/2007 End: 12/31/2007
 Period 2 Start: 01/01/2008 End: 12/31/2008

All constituents Enter Your Organization Info

Category	Period 1 No. of Donors	Period 1 Amount	Period 2 No. of Donors	Period 2 Amount	Gains(Los...	Gai...
New	0	\$0.00	10	\$34,450.00	\$34,450.00	
Recapture	0	\$0.00	18	\$25,000.00	\$25,000.00	
Upgrade	26	\$59,765.00	26	\$329,425.00	\$269,660.00	451%
Upgrade new	2	\$1,100.00	2	\$165,050.00	\$163,950.00	14905%
Same	5	\$17,000.00	5	\$17,000.00	\$0.00	0%
Downgrade	24	\$293,095.00	24	\$67,050.00	(\$226,045.00)	(77%)
Lapsed new	3	\$110,050.00	0	\$0.00	(\$110,050.00)	(100%)
Lapsed other	33	\$83,560.00	0	\$0.00	(\$83,560.00)	(100%)

Number of gift transactions Period 1: 219 Number of gift transactions Period 2: 192 Preview All Data

Individuals Only

Category	Period 1 No. of Donors	Period 1 Amount	Period 2 No. of Donors	Period 2 Amount	Gains(Los...	Gain...
New	0	\$0.00	3	\$5,325.00	\$5,325.00	
Recapture	0	\$0.00	15	\$22,600.00	\$22,600.00	
Upgrade	24	\$8,765.00	24	\$111,925.00	\$103,160.00	1177%
Upgrade new	2	\$1,100.00	2	\$165,050.00	\$163,950.00	14905%
Same	3	\$15,000.00	3	\$15,000.00	\$0.00	0%
Downgrade	24	\$293,095.00	24	\$67,050.00	(\$226,045.00)	(77%)
Lapsed new	2	\$105,050.00	0	\$0.00	(\$105,050.00)	(100%)
Lapsed other	31	\$77,610.00	0	\$0.00	(\$77,610.00)	(100%)

Number of gift transactions Period 1: 209 Number of gift transactions Period 2: 169 Preview Individual Data

Organizations Only

Category	Period 1 No. of Donors	Period 1 Amount	Period 2 No. of Donors	Period 2 Amount	Gains(Los...	Gains(L...
New	0	\$0.00	7	\$29,125.00	\$29,125.00	
Recapture	0	\$0.00	3	\$2,400.00	\$2,400.00	
Upgrade	2	\$51,000.00	2	\$217,500.00	\$166,500.00	326%
Same	2	\$2,000.00	2	\$2,000.00	\$0.00	0%
Lapsed new	1	\$5,000.00	0	\$0.00	(\$5,000.00)	(100%)
Lapsed other	2	\$5,950.00	0	\$0.00	(\$5,950.00)	(100%)
Total (Calc.)	7	\$63,950.00	14	\$251,025.00	\$187,075.00	

Number of gift transactions Period 1: 10 Number of gift transactions Period 2: 23 Preview Organization Data

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Column Descriptions

- **Category:** The different measured areas of the fundraising effectiveness plug-in
- **Period 1 No. of Donors:** The overall count of donors that are participating in each category for Period 1
- **Period 1 Amount:** The overall amount of giving from donors that are participating in each category for Period 1
- **Period 2 No. of Donors:** The overall count of donors that are participating in each category for Period 2
- **Period 2 Amount:** The overall amount of giving from donors that are participating in each category for Period 2
- **Gains (Losses) Amount:** The total amount of Period 2 less Period 1
- **Gains (Losses) Percentage:** The total percentage of Period 2 less Period 1

Row Descriptions

- **New:** Donors who never gave prior to the current period (period 2)

- Ex: Paul Mai gave his very first gift in 2008; therefore, he will be listed as “New” in the period 2 column
- NOTE: Period 1 will remain blank for this category
- **Recapture:** Previously lapsed donors who gave again in the current period (period 2)
 - Ex: Paul Mai gave a gift in 2005 and then didn’t give again until 2008
 - NOTE: Period 1 will remain blank for this category
- **Upgrade:** Donors who gave more in the current period than in a previous period
 - Ex: Paul Mai has 3 gifts on his record. \$25 in 2005, \$50 in 2007, and \$100 in 2008. He will be included in period 1 (because he increased his giving from a previous year) with \$50 as his total giving. He will be included in period 2 (because he increased his giving from a previous year) with \$100 as his total giving
- **Upgrade new:** Donors who gave their first gift in period 1 and then increased their giving in period 2
 - Ex: Paul Mai has 2 gifts on his record. \$50 in 2007 and \$100 in 2008. He will be included in period 1 (because he is a new donor) with \$50 as his total giving. He will be included in period 2 (because he increased his giving from a previous year) with \$100 as his total giving
- **Same:** Donors who have given the same amount year over year including gifts in period 1 and period 2
 - Ex: Paul Mai has 3 gifts on his record. \$100 per year in 2006, 2007, and 2008. He will be included in period 1 (because he maintained his giving from a previous year) with \$100 as his total giving. He will be included in period 2 (because he maintained his giving from a previous year) with \$100 as his total giving
- **Same new:** Donors who made their first gift in period 1 and then maintained that same level in period 2
 - Ex: Paul Mai has 2 gifts on his record. \$100 in 2007 and \$100 in 2008. He will be included in period 1 (because he is a new donor) with \$100 as his total giving. He will be included in period 2 (because he maintained his giving from a previous year) with \$100 as his total giving
- **Downgrade:** Donors who gave less in the current period than in a previous period
 - Ex: Paul Mai has 3 gifts on his record. \$100 in 2005, \$50 in 2007, and \$25 in 2008. He will be included in period 1 (because he decreased his giving from a previous year) with \$50 as his total giving. He will be included in period 2 (because he decreased his giving from a previous year) with \$25 as his total giving
- **Downgrade new:** Donors who gave their first gift in period 1 and decreased their giving in period 2
 - Ex: Paul Mai has 2 gifts on his record. \$50 in 2007 and \$25 in 2008. He will be included in period 1 (because he is a new donor) with \$50 as his total giving. He will be included in period 2 (because he decreased his giving from a previous year) with \$25 as his total giving
- **Lapsed new:** Donors who gave their first gift in period 1 and then did not give in period 2
 - Ex: Paul Mai gave a gift in 2007 and then didn’t give again in 2008
- **Lapsed other:** Donors who gave in the years up to and including period 1 but did not give in period 2
 - Ex: Paul Mai gave a gift in 2006 and then another gift in 2007 but did not give a gift in 2008
- **Total:** The sum of all the calculations within each column