

ORGANIZATION FUNDRAISING ANALYSIS

1. How well understood is the agency's case for support?
2. Do materials reflect the need for donations – to help people?
3. How much donated income is needed to support the organization?
4. Does the organization have reserves or an endowment? What are the goals and policies? What is the annual income?
5. How many donors contributed in each of the previous 3 years?
6. What is the total amount contributed in each year for the past 3?
7. How many individuals donated? What is the total?
8. What is the attrition rate? New donor rate? Retention Rate?
9. Run above reports by Individuals, Corporations, and Foundations.
10. Other donations? In kind? Events?
11. Arrange gift list from low to high and categorize. Look at changes over time. Trends.
12. Who are the largest donors? What did they respond to? Who are multiple year donors?
13. Run a LYBUNT Report (donors who gave Last Year, But Unfortunately Not This Year)
14. Do these reports indicate enough revenue to support the budget needs?
15. What do you need to do to change this formula?