



THE 30-DAY FUNDRAISING RESET

Assess, Refresh, and Reactivate Your Fundraising Plan





TODAY'S TOPICS

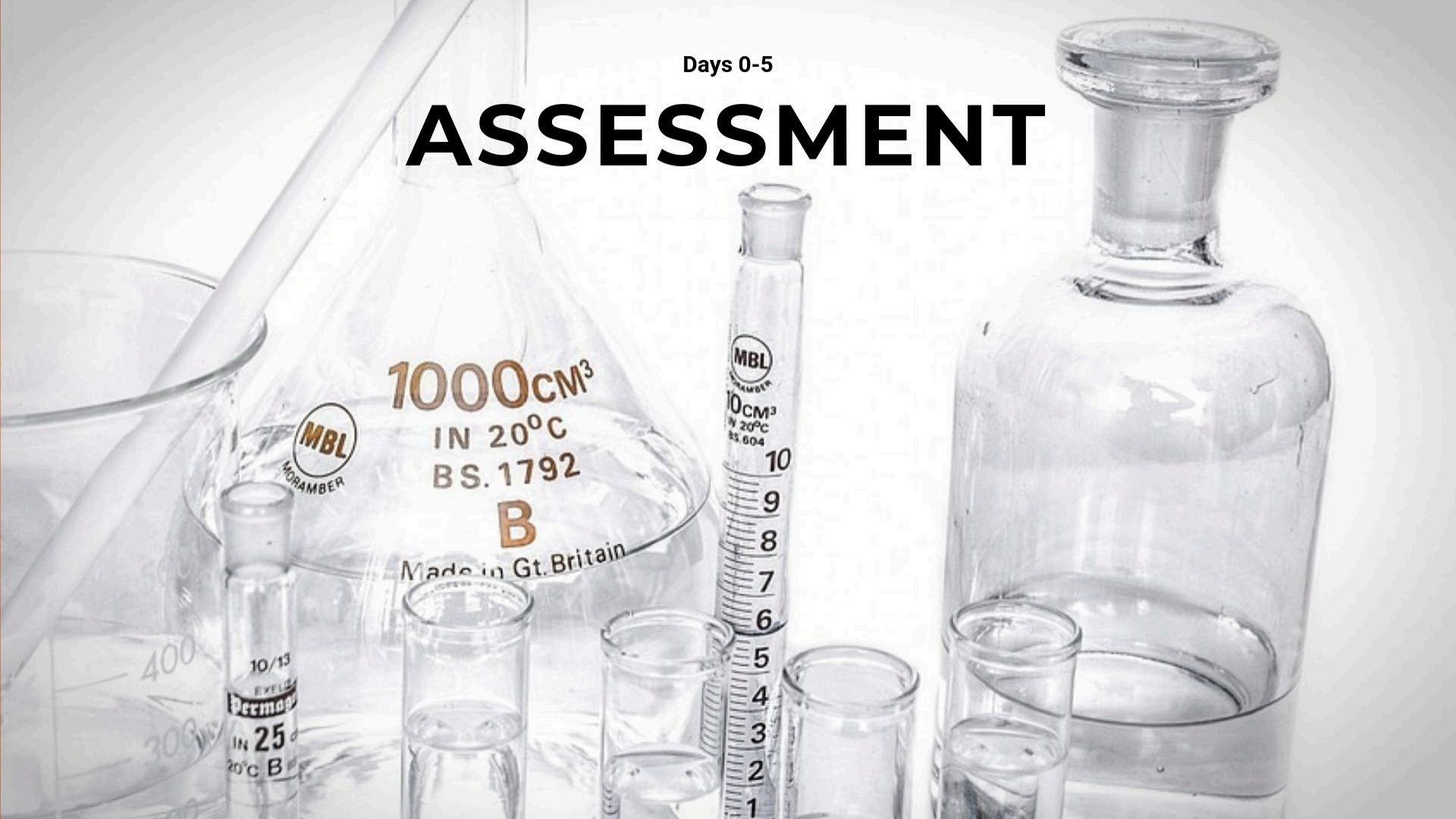
- 1 Assess where you are now**
- 2 Eliminate what's not working and improve what's working**
- 3 Budgeting**
- 4 Action planning**

BEFORE YOU START

- **Schedule 15 minutes each weekday to work on this project**

Days 0-5

ASSESSMENT



WEEK 1 CHECKLIST

| Day | Task |
|-----|--|
| 1 | Spend 15 minutes writing down your instincts about what works and what doesn't |
| 2 | Download the Fundraising Fitness Test |
| 3 | Download your gift data and paste it in the template |
| 4 | Look at the report and highlight what looks interesting: donor retention, acquisition, gift frequency, other data points unique to your report |
| 5 | Look at your notes and the Fundraising Fitness Test to create your list of what works and what doesn't |

CONDUCTING A QUICK ASSESSMENT



QUALITATIVE

- ✓ What do we do well?
- ✗ What could use some improvement and why?
- ✓ How do we feel about where we are?

CONDUCTING A QUICK ASSESSMENT



QUANTITATIVE

- ✓ **Template at afpglobal.org/FundraisingEffectivenessProject**
- ✓ **6 Growth in Giving Reports**
- ✓ **Donor retention, gains and losses, growth in giving, donor loyalty across varying dollar segments**

FEP Fundraising Fitness Test

4/6/2018

See "All Indicators" worksheet for details & formulas by "Indicator Number"

12 <-- Year-end month

Year2: 2016

Year1: 2015

TOP Actionable Indicators

Giving Level/Range

| No. | Fundraising Performance Indicator | All Donors | Under \$100 | \$100-\$249 | \$250-\$999 | \$1,000-\$4,999 | \$5,000 & Up |
|--|-----------------------------------|------------|-------------|-------------|-------------|-----------------|--------------|
| Donor retention rate | | | | | | | |
| 1 | New donor retention rate | 27% | 16% | 32% | 69% | 73% | 33% |
| 2 | Repeat donor retention rate | 77% | 56% | 75% | 87% | 91% | 89% |
| 3 | Overall donor retention rate | 63% | 37% | 63% | 86% | 90% | 86% |
| Donor acquisition rate | | | | | | | |
| 6a | New donor acquisition rate | 24% | 45% | 24% | 7% | 5% | 14% |
| 6b | Repeat donor re-acquisition rate | 14% | 19% | 16% | 8% | 10% | 6% |
| 6 | Overall donor acquisition rate | 39% | 64% | 40% | 15% | 15% | 20% |
| Donor gains, losses & net | | | | | | | |
| 5 | Donor gains | 1,166 | 605 | 393 | 126 | 32 | 10 |
| 7 | Donor losses | 1108 | 600 | 359 | 120 | 22 | 7 |
| 9a | Net gain in donors | 58 | 5 | 34 | 6 | 10 | 3 |
| 12 | Net gain in donors (%) | 5% | 1% | 9% | 5% | 31% | 30% |
| Number of donors | | | | | | | |
| 13 | Overall donors retained | 1,918 | 346 | 623 | 708 | 198 | 43 |
| 16 | Percent of Year2 donors by range | 100% | 31% | 33% | 27% | 7% | 2% |
| Amount of gifts | | | | | | | |
| 18 | Percent of Year2 gift\$ by range | 100% | 3% | 10% | 23% | 24% | 40% |
| 19 | Average gift size in Year2 | \$ 399 | \$ 37 | \$ 115 | \$ 344 | \$ 1,289 | \$ 9,324 |
| Dollar gains, losses & net | | | | | | | |
| 20 | Dollar gains | \$ 514,690 | \$ 24,372 | \$ 60,579 | \$ 78,056 | \$ 80,115 | \$ 271,568 |
| 22 | Dollar losses | \$ 474,882 | \$ 23,103 | \$ 51,207 | \$ 64,483 | \$ 54,124 | \$ 281,966 |
| 27 | Net gain in dollars (%) | 8% | 5% | 15% | 17% | 32% | -4% |
| Growth in giving (GIG) | | | | | | | |
| 39 | Overall rate of growth in gifts | 3% | 4% | 9% | 5% | 10% | -2% |
| Growth in donors | | | | | | | |
| 43 | Overall rate of growth in donors | 2% | 1% | 3% | 1% | 5% | 6% |
| Distribution of Year2 donors & gifts: | | | | | | | |

TOP Indicators 6 Year Trends Income Summary Greenfield Greenfield GIG Pareto Principle GainLoss Year2Distrib

FEP Fundraising Fitness Test

4/6/2018

12 <-- Year-end month

Year2: 2016

Year1: 2015

Six Year Trend Analysis

| Fundraising Performance Indicator | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 6-Year ROG |
|--------------------------------------|------------|------------|------------|------------|--------------|--------------|------------|
| | | | | | | | YTD |
| 36 Total gifts in Year1 | \$ 667,917 | \$ 818,368 | \$ 738,495 | \$ 967,703 | \$ 981,302 | \$ 1,189,944 | 84% |
| 37 Total gifts in Year2 | \$ 818,368 | \$ 738,495 | \$ 967,703 | \$ 981,302 | \$ 1,189,944 | \$ 1,229,752 | |
| | | | | | | | |
| 40 Total donors in Year1 | 2,267 | 2,605 | 2,768 | 2,541 | 3,023 | 3,026 | 36% |
| 41 Total donors in Year2 | 2,505 | 2,768 | 2,541 | 3,023 | 3,026 | 3,084 | |
| 78c Number of gifts in Year2 | 10,314 | 10,962 | 11,207 | 12,425 | 12,791 | 13,207 | |
| 78d Average frequency in Year2 | 4.12 | 3.96 | 4.41 | 4.11 | 4.23 | 4.28 | |
| 78e Average amount in Year2 | \$ 79.35 | \$ 67.37 | \$ 86.35 | \$ 78.98 | \$ 93.03 | \$ 93.11 | |
| | | | | | | | |
| 72 Monthly donors in Year2 **** | 608 | 628 | 657 | 683 | 700 | 716 | |
| 75 Monthly-donor gifts in Year2 | \$ 355,365 | \$ 353,440 | \$ 391,405 | \$ 431,082 | \$ 453,532 | \$ 473,325 | |
| 22 new Net change in monthly donors* | | 103% | 105% | 104% | 102% | 102% | |
| | | | | | | | |
| 5a New donors in Year2 | 904 | 1,010 | 658 | 967 | 823 | 734 | |
| 5b Reactivated donors in Year2 | 254 | 275 | 311 | 407 | 358 | 432 | |
| 2a Repeat donors in Year2 | 1,347 | 1,483 | 1,572 | 1,649 | 1,845 | 1,918 | |
| 58a Upgraded in Year2 | 642 | 583 | 688 | 600 | 737 | 738 | |
| 60a Same in Year2 | 293 | 299 | 385 | 456 | 534 | 579 | |
| 62a Downgraded in Year2 | 412 | 601 | 499 | 593 | 574 | 601 | |
| 7 Lapsed donors | 920 | 1,022 | 1,196 | 892 | 1,178 | 1,108 | |
| 7a New in Year1 | 605 | 618 | 725 | 437 | 674 | 597 | |
| 33 7b Repeat in Year1 | 315 | 404 | 471 | 455 | 504 | 511 | |

TOP Indicators 6 Year Trends Income Summary Greenfield Greenfield GIG Pareto Principle GainLoss Year2Distrib Comparison - FEP Ratio

AN EXAMPLE

CLOSE TO REAL TIME ANALYSIS

- **Question: What can we do to improve?**
- **Conditions**
 - Declining audiences and donors nationwide
 - On-air fundraising has crashed across the country
 - Major markets are announcing staff layoffs on a weekly basis



AREAS FOR IMPROVEMENT

- Run the FFT on any 12-month period by changing the end date
- Review top indicators and six year trends



- Home
- Constituents
- Groups
- Reports**
- Communications
- Data Tools
- Settings

FFT Export

Delete Cancel Save And

Report Details

Transaction Filters

Include Type is 'Donation', 'Pledge Payment', or 'Recurring Do...' x Amount is at least \$0.01 x And

Or

Exclude Add filter...

31488 transactions found (last run a few seconds ago) Refresh Add Column

| Account Number | Date | Amount |
|----------------|------------|----------------|
| TOTALS | | \$1,474,321.28 |
| 90 | 11/14/2024 | \$88.90 |
| 90 | 11/14/2024 | \$88.90 |
| 2063 | 11/13/2024 | \$20.00 |
| 2408 | 11/13/2024 | \$7.00 |
| 3374 | 11/13/2024 | \$10.00 |
| 3255 | 11/12/2024 | \$10.00 |
| 336 | 11/12/2024 | \$25.00 |
| 73 | 11/11/2024 | \$15.00 |



BENCHMARKING



| | 2023 FEP Benchmark | October 2024 stats |
|-------------------------|--------------------|--------------------|
| Overall Donor Retention | 42% | 65% |
| Repeat Donor Retention | 58% | 71% |
| Acquisition Rate | 39% | 34% |
| Gift Frequency | | 7.38 |

FEP Fundraising Fitness Test

Six Year Trend Analysis

10 <-- Year-end month

Year2: 2024

Year1: 2023

| Fundraising Performance Indicator | | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 YTD |
|-----------------------------------|-------------------------------|-----------|-----------|-----------|-----------|-----------|-------------|
| 36 | Total gifts in Year1 | \$ 96,070 | \$ 93,945 | \$ 99,715 | \$ 83,538 | \$ 85,237 | \$ 98,778 |
| 37 | Total gifts in Year2 | \$ 93,945 | \$ 99,715 | \$ 83,538 | \$ 85,237 | \$ 98,778 | \$ 107,113 |
| 40 | Total donors in Year1 | 404 | 451 | 397 | 333 | 268 | 231 |
| 41 | Total donors in Year2 | 451 | 397 | 333 | 268 | 231 | 229 |
| 78c | Number of gifts in Year2 | 2,432 | 2,395 | 2,263 | 2,009 | 1,749 | 1,689 |
| 78d | Average frequency in Year2 | 5.39 | 6.03 | 6.80 | 7.50 | 7.57 | 7.38 |
| 78e | Average amount in Year2 | \$ 38.63 | \$ 41.63 | \$ 36.91 | \$ 42.43 | \$ 56.48 | \$ 63.42 |
| 72 | Monthly donors in Year2 **** | 167 | 168 | 164 | 145 | 127 | 115 |
| 75 | Monthly-donor gifts in Year2 | \$ 44,890 | \$ 46,494 | \$ 47,347 | \$ 40,394 | \$ 63,731 | \$ 41,446 |
| new | Net change in monthly donors* | | 101% | 98% | 88% | 88% | 91% |



TACTICS



- **Focus on developing new acquisition tactics**
- **Increased messaging about monthly donors**
- **Shift stewardship efforts to monthly donors because they are upgrading**

Days 8-12

SUBTRACT AND IMPROVE



Subtract



The
Untapped
Science
of Less

Leidy Klotz

"Subtraction is the act of getting to less, but it is not the same as doing less.

In fact, getting to less often means doing, or at least thinking, more."

**To attain knowledge add things every day.
To attain wisdom subtract things every day.
Lao Tzu**

WEEK 2 CHECKLIST

| Day | Task |
|-----|---|
| 1 | Spend 15 minutes writing down your top two performing tactics and bottom two tactics and calculate a rough return on investment |
| 2 | Ask for input from others with the Evaluation Matrix |
| 3 | Pick ONE tactic that you want to stop doing and brainstorm how you would deploy the resources released by stopping that thing |
| 4 | Pick ONE tactics that you would like to improve and brainstorm how you would do that |
| 5 | Create financial projections based on your changes to these two tactics |

FUNDRAISING IDEAS EVALUATION



EVALUATION MATRIX

| Tactics | Money | Effort | Success | Uniqueness | Mission Match | Total score |
|---------|-------|--------|---------|------------|---------------|-------------|
| | | | | | | |
| | | | | | | |
| | | | | | | |

INSTRUCTIONS

- **Figure out who has a stake in the decision**
- **Put all the ideas on a list**
- **Evaluate based on your criteria on a scale of 1 to 10**
- **Total the categories and sort the top ones**
- **Discuss the top options**

CRITERIA

| | High value | Low Value |
|---------------|--|---|
| Money | Yes, this will make money | No, it won't make much |
| Effort | This is no work at all: someone hands us a check | We need all hands on deck to make this happen |
| Success | High likelihood of success | High risk of failure |
| Uniqueness | No one else has ever seen anything like this! | This tactic is everywhere |
| Mission Match | This tactic totally reflects our mission and brand | Alignment is questionable |

WHAT CAN YOU IMPROVE?

- **Number of people reached**
- **Frequency of campaign**
- **Average gift**
- **Lower cost**
- **Refresh the approach or appeal**
- **Automate the work ("smart automation")**



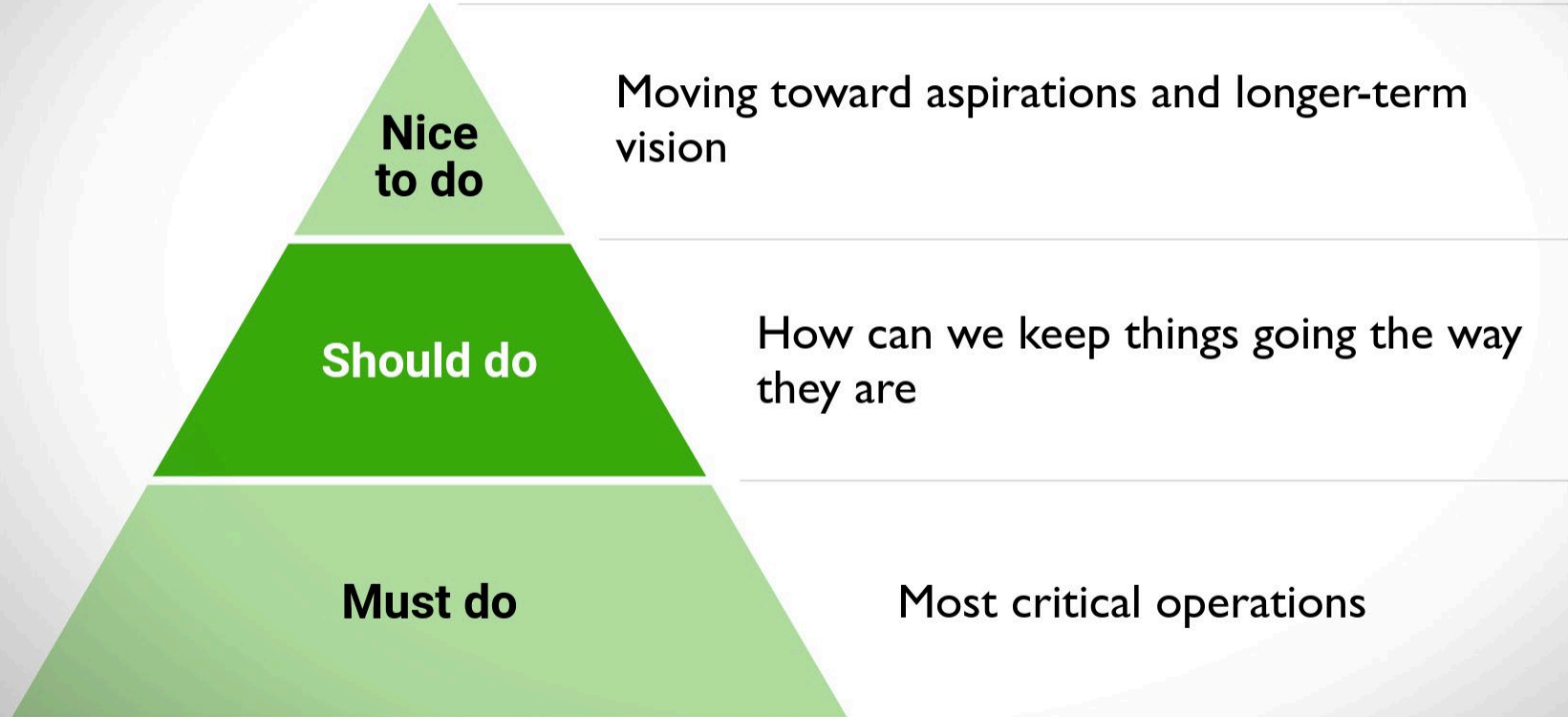
Days 15-19

BUDGET

WEEK 3 CHECKLIST

| Day | Task |
|-----|---|
| 1 | Spend 15 minutes brainstorming "Must Do," "Should Do," and "Nice to Do" |
| 2 | Gather information about the expenses and revenues for each of the categories |
| 3 | Calculate the "Must Do" budget |
| 4 | Calculate the "Should Do" budget |
| 5 | Calculate the "Nice to Do" budget |

BUDGET PRIORITIES



Days 22-26

MAKE IT A PLAN



friday 10
saturday

sunday

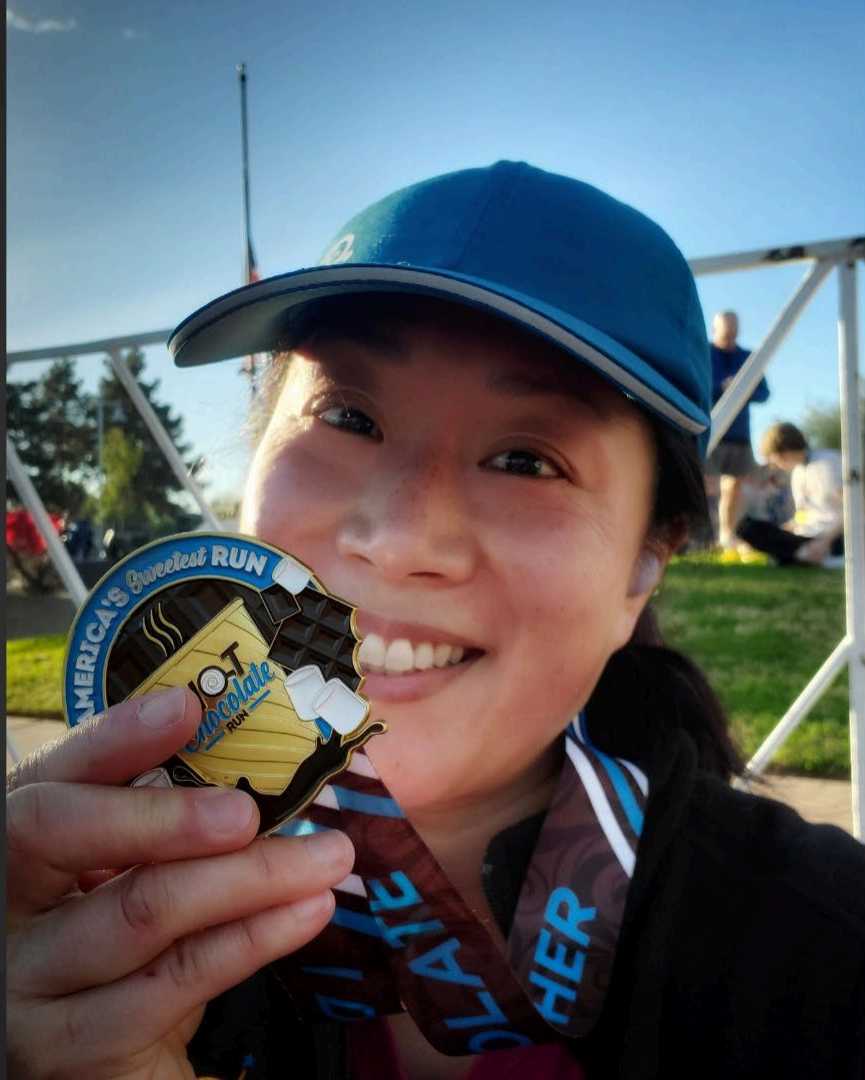
WEEK 4 CHECKLIST

| Day | Task |
|-----|--|
| 1 | Create financial goals for all remaining tactics |
| 2 | Create a month by month calendar |
| 3 | Add the things you know have to happen (events, grant deadlines, campaigns you are keeping) |
| 4 | Add in lead time for the fixed date events and quarterly reviews |
| 5 | Block out 15 minutes a day moving forward to work on ONE thing that moves your plan forward |

SUMMARY

30 DAY PLAN

| Mon | Tue | Wed | Thu | Fri |
|--|--|--|---|--|
| What works/what doesn't? ² | Download FFT ³ | Run FFT ⁴ | Look at report ⁵ | Brainstorm potential actions ⁶ |
| Calculate ROI on top 2 and bottom 2 ⁹ | Run ideas evaluation ¹⁰ | Pick one thing to stop ¹¹ | Pick one thing to improve ¹² | Create financial projections for those tactics ¹³ |
| Discern Must Do, Should Do, Nice to Do ¹⁶ | Gather expenses and revenue ¹⁷ | Create Must Do budget and goal ¹⁸ | Create Should Do budget and goal ¹⁹ | Create Nice to Do budget and goal ²⁰ |
| Create financial goals for all remaining tactics ²³ | Create a month-by-month calendar ²⁴ | Add time-sensitive events ²⁵ | Add lead time and quarterly reviews ²⁶ | Block 15 minutes a day on your calendar to work the plan ²⁷ |
| Celebrate! ³⁰ | ³¹ | | | |



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