



Project Manager

Consultant

Date

## Annual Fund Analysis Order Form

Client Name:

Primary Contact Name:

Primary Contact Email:

Data Contact Name:

Data Contact Email:

**Year Type for Annual Fund:**

Calendar Year

Fiscal Year, Dates:

**Presentation Preference:**

In Person

Screencast

### Standard Annual Fund Analysis Includes:

Gift Summary

Giving Levels

Retention Rates

Upgrades, Downgrades, Losses, and Gains

RFM Analysis

Renewal by LG Date

Years of Giving

Forecasting for Current and/or Next Year

Acquisition Year Analysis

Giving by Month

AFP Benchmarking

### Optional Annual Fund Add-Ons (No Additional Costs):

Geographical Heat Maps of Donors

Segmentation, Please provide segment(s) of interest:

Major Gifts, Please provide criteria:

OTHER: please elaborate:

Are there any specific areas to focus on or any specific needs?