

ANNUAL FUND ANALYSIS

Data Dates: 1/1/2008 – 12/31/2018

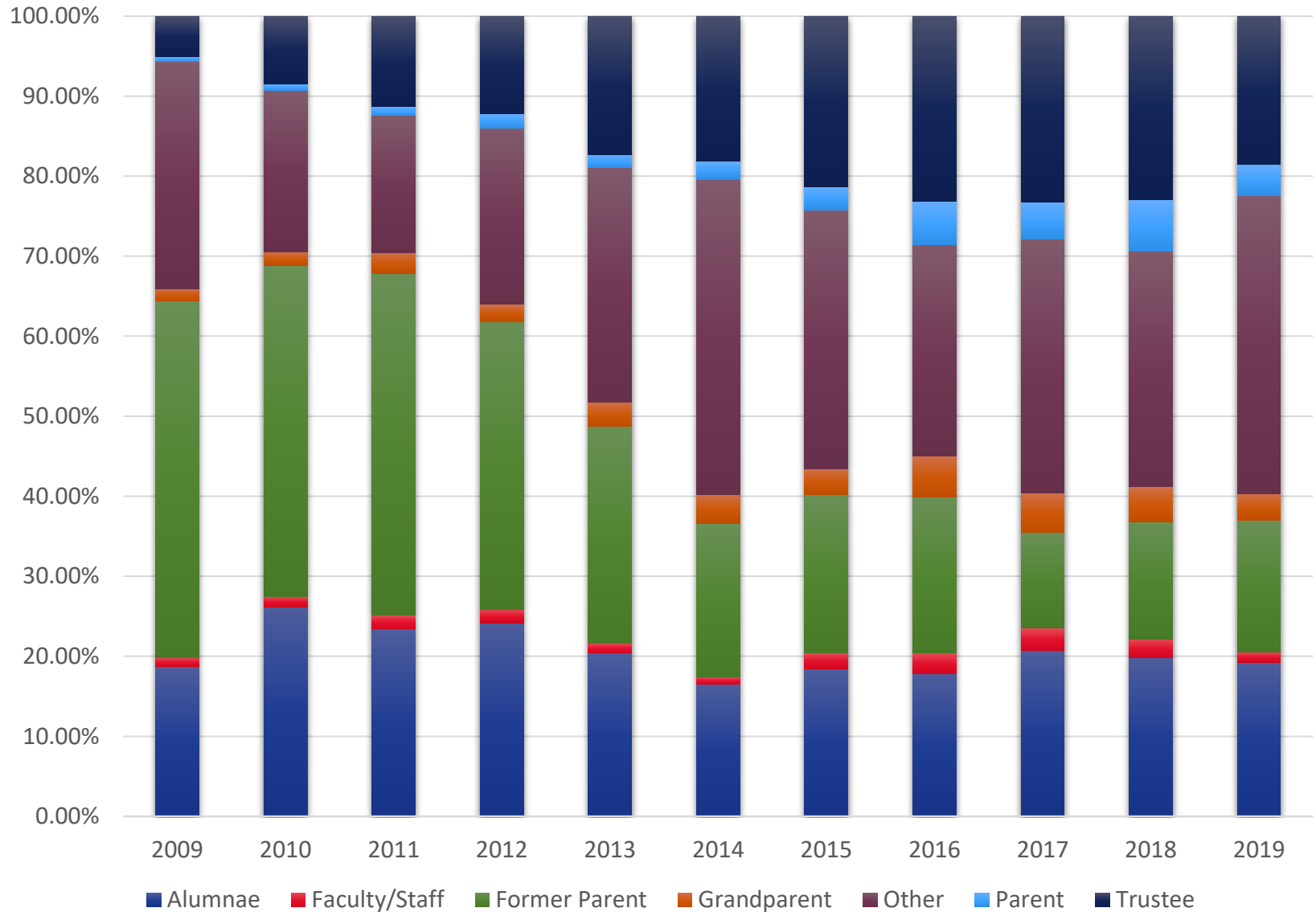
Date of Completed Analysis: 1/25/19

Fiscal Year: July 1- June 30

ALL SEGMENTS

Gift History						Segment: All
Fiscal Year	# of Gifts	Total \$	Avg. Gift Value	# of Donors	Avg. Donor Value	Avg. # of Gifts per Donor
2009	1,228	\$635,881	\$517.82	1,051	\$605.02	1.17
2010	1,270	\$626,063	\$492.96	1,144	\$547.26	1.11
2011	1,234	\$557,419	\$451.72	1,068	\$521.93	1.16
2012	1,270	\$651,265	\$512.81	1,073	\$606.96	1.18
2013	1,180	\$667,185	\$565.41	966	\$690.67	1.22
2014	1,187	\$738,466	\$622.13	982	\$752.00	1.21
2015	1,366	\$735,500	\$538.43	1,045	\$703.83	1.31
2016	2,083	\$1,033,242	\$496.04	1,141	\$905.56	1.83
2017	2,569	\$1,330,041	\$517.73	1,165	\$1,141.67	2.21
2018	2,724	\$1,337,185	\$490.89	1,187	\$1,126.52	2.29
Grand Total	16,111	\$8,312,246				

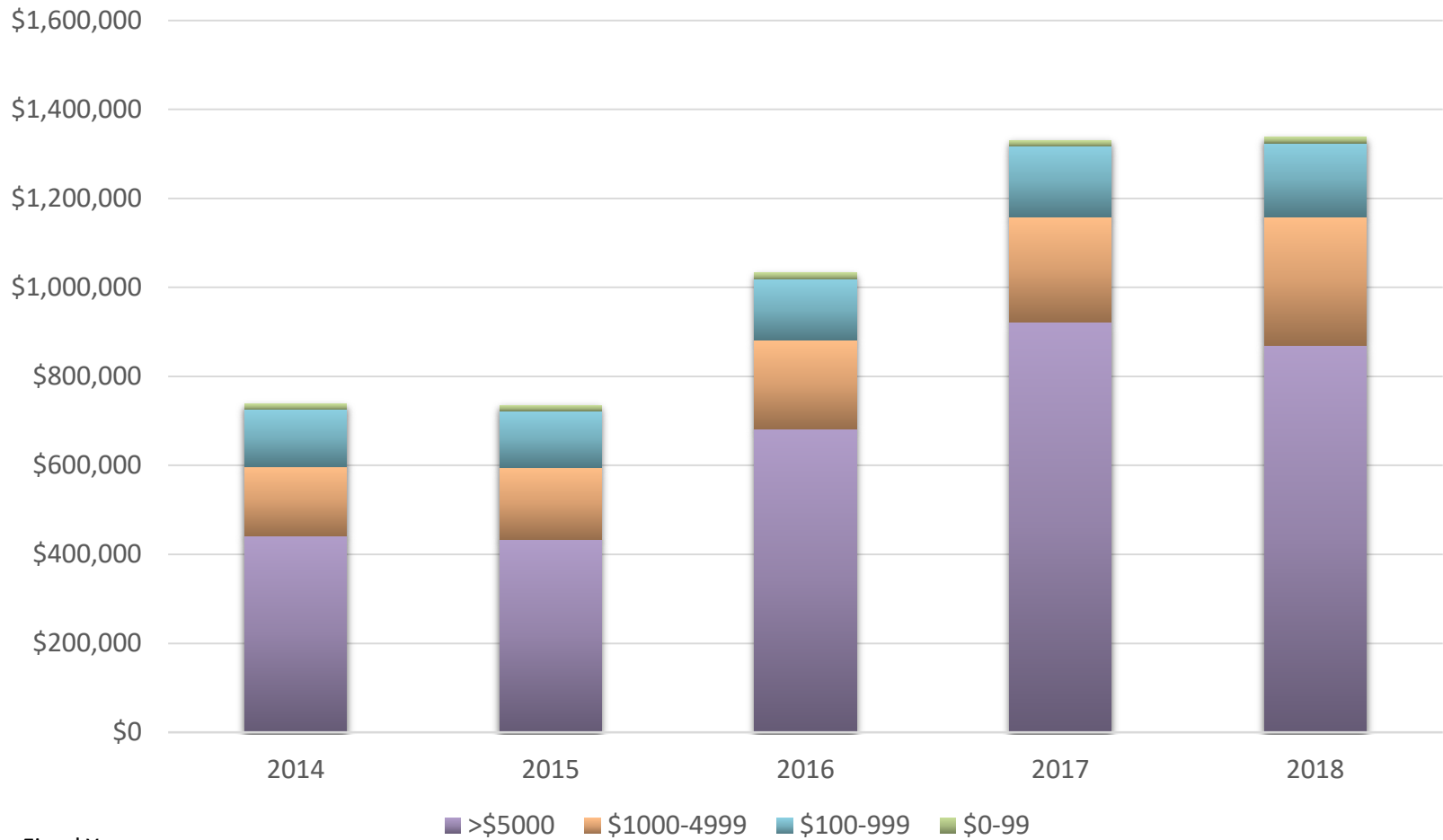
Yearly Giving Amount By Segment



Donors by Giving Level											Segment: All
Fiscal Year	FY 2014		FY 2015		FY 2016		FY 2017		FY 2018		Grand Total
Level	Dollars	Donors	Dollars	Donors	Dollars	Donors	Dollars	Donors	Dollars	Donors	Dollars
\$10,000 +	\$358,300	14	\$318,727	16	\$535,811	25	\$788,486	34	\$686,250	29	\$2,687,573
\$5,000-\$9,999	\$83,939	14	\$115,650	21	\$146,211	25	\$133,529	23	\$183,467	28	\$662,797
Upper Total	\$442,239	28	\$434,377	37	\$682,022	50	\$922,015	57	\$869,718	57	\$3,350,370
\$2,500-\$4,999	\$64,986	19	\$63,166	20	\$63,178	20	\$82,887	27	\$115,081	37	\$389,298
\$1,000-\$2,499	\$90,219	72	\$97,430	76	\$135,201	96	\$152,978	110	\$174,643	129	\$650,471
Upper Mid Total	\$155,205	91	\$160,596	96	\$198,379	116	\$235,865	137	\$289,724	166	\$1,039,769
\$500-\$999	\$56,862	101	\$45,350	83	\$51,631	92	\$54,481	98	\$68,231	120	\$276,556
\$250-\$499	\$29,010	101	\$36,877	126	\$35,625	117	\$42,724	136	\$42,701	130	\$186,937
\$100-\$249	\$42,575	328	\$45,135	349	\$50,527	365	\$62,475	414	\$54,371	382	\$255,083
Lower Mid Total	\$128,448	530	\$127,362	558	\$137,783	574	\$159,680	648	\$165,304	632	\$718,576
\$50-\$99	\$8,403	157	\$9,309	168	\$10,481	190	\$8,583	155	\$8,376	153	\$45,152
\$25-\$49	\$3,327	123	\$2,810	106	\$3,761	138	\$3,013	101	\$3,243	110	\$16,154
\$0-\$24	\$844	53	\$1,047	80	\$816	73	\$885	67	\$821	69	\$4,413
Lower Total	\$12,574	333	\$13,166	354	\$15,058	401	\$12,481	323	\$12,440	332	\$65,719
Grand Total	\$738,466	982	\$735,500	1,045	\$1,033,242	1,141	\$1,330,041	1,165	\$1,337,185	1,187	\$5,174,434

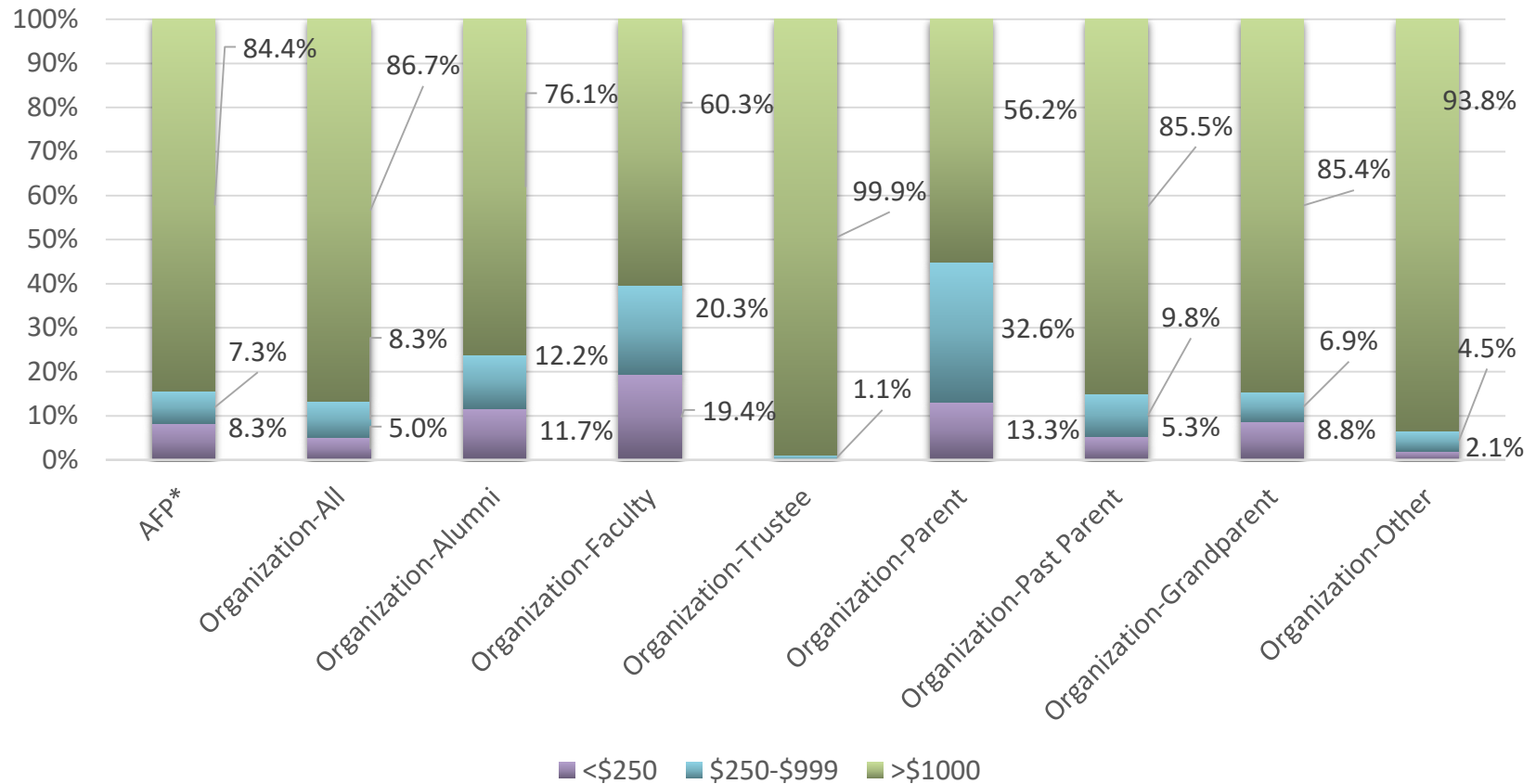
Dollars by Giving Level

Segment: All



DONOR GIVING LEVELS BENCHMARKING

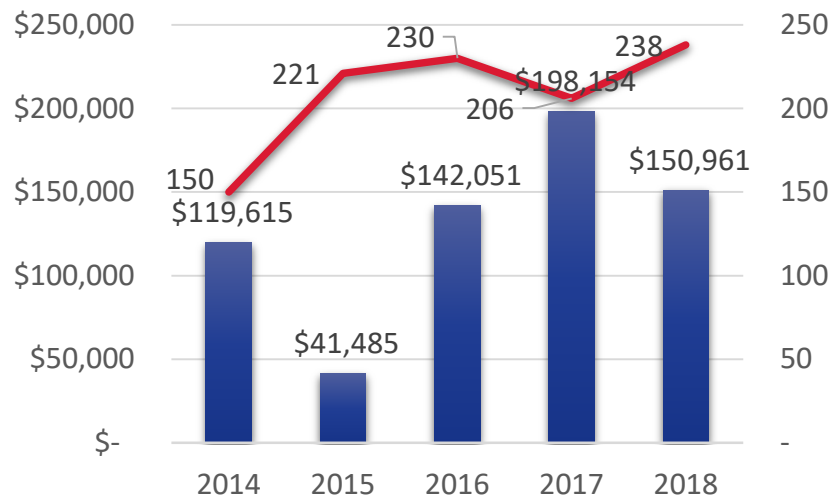
Donor Giving Levels for 2018



*The Association of Fundraising Professionals 2017 compilation of results from over 8,000 organizations with over 7 million donors and over \$7 billion in gifts

First-Time Donor

Segment: All



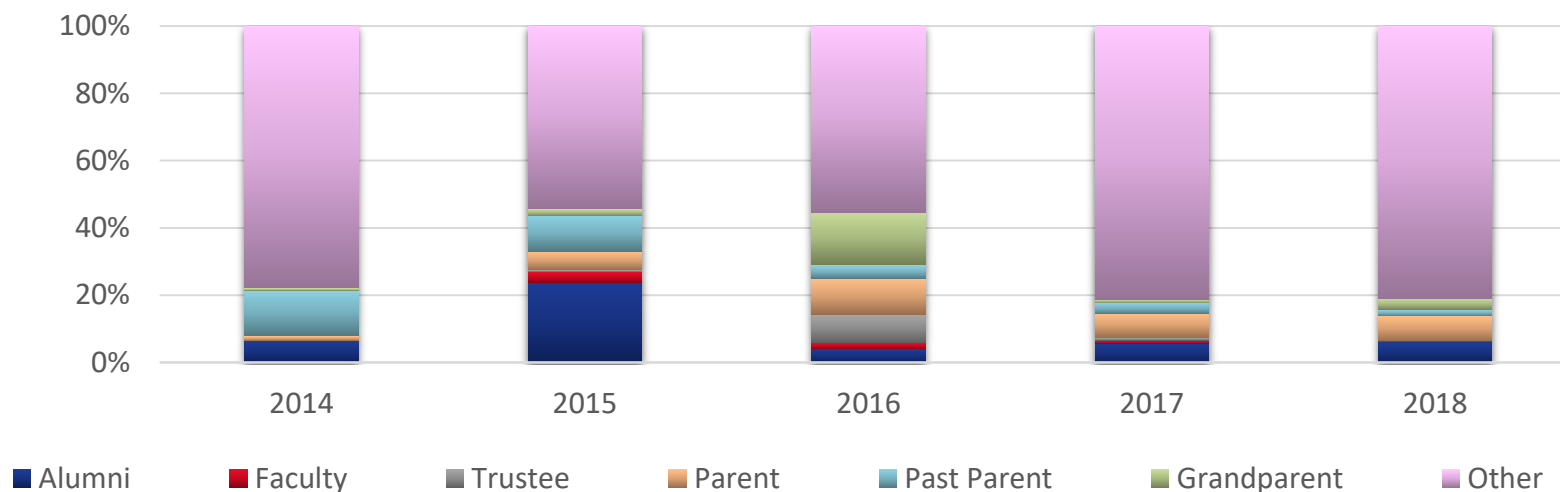
Period	FY 2015	FY 2016	FY 2017	FY 2018
# of All Donors	1,045	1,141	1,165	1,187
# of New Donors	221	230	206	238
% New Donors	21%	20%	18%	20%

Fiscal Year

■ Dollars — Number of Donors

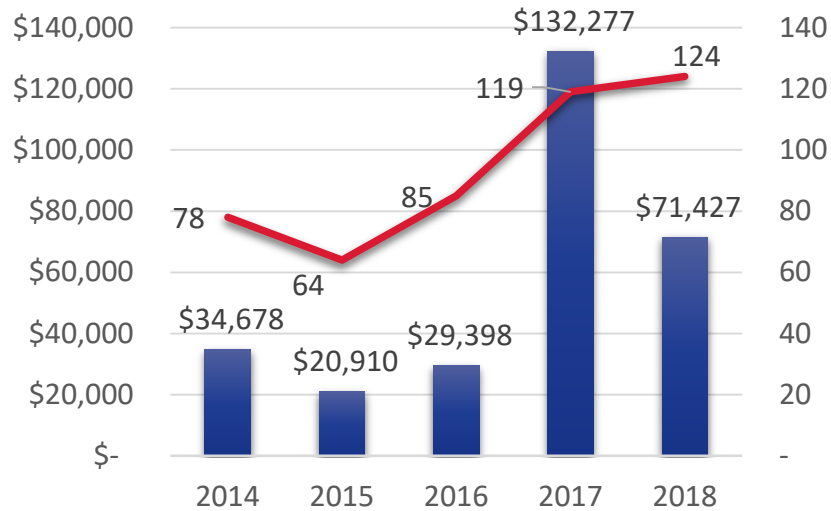
First-Time Donor Dollars

Segment: All



First-Time Donor Renewal

Segment: All



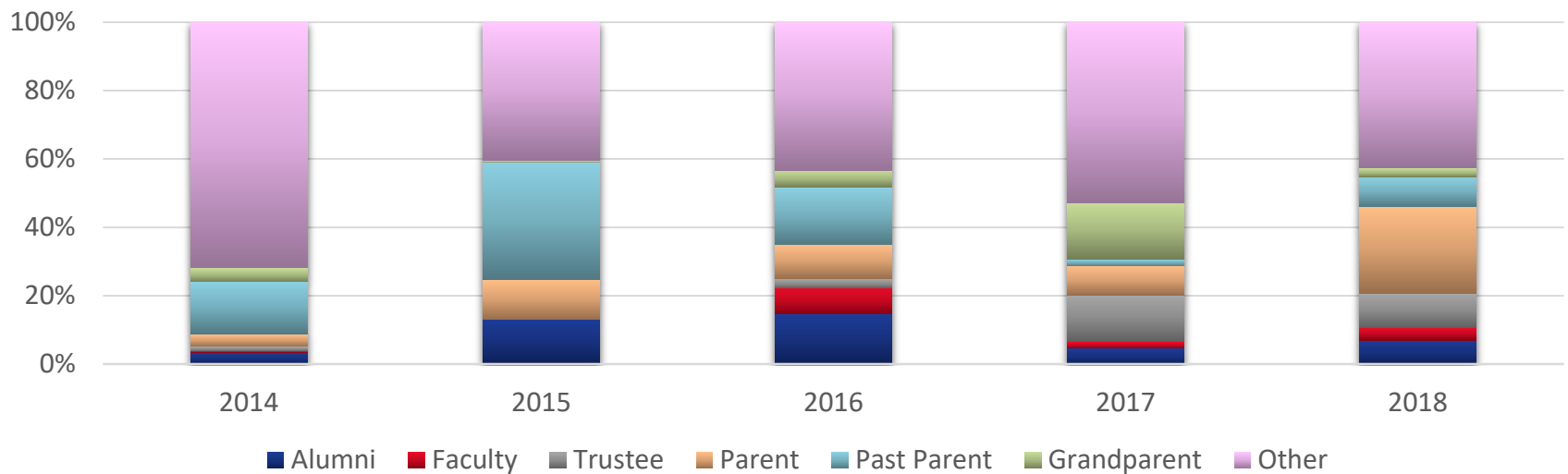
Period	FY 2015	FY 2016	FY 2017	FY 2018
# of LY New Donors	150	221	230	206
# of Renewals	64	85	119	124
% Renewals	42.7%	38.5%	51.7%	60.2%

Fiscal Year

■ Dollars — Number of Donors

First-Time Donor Renewal Dollars

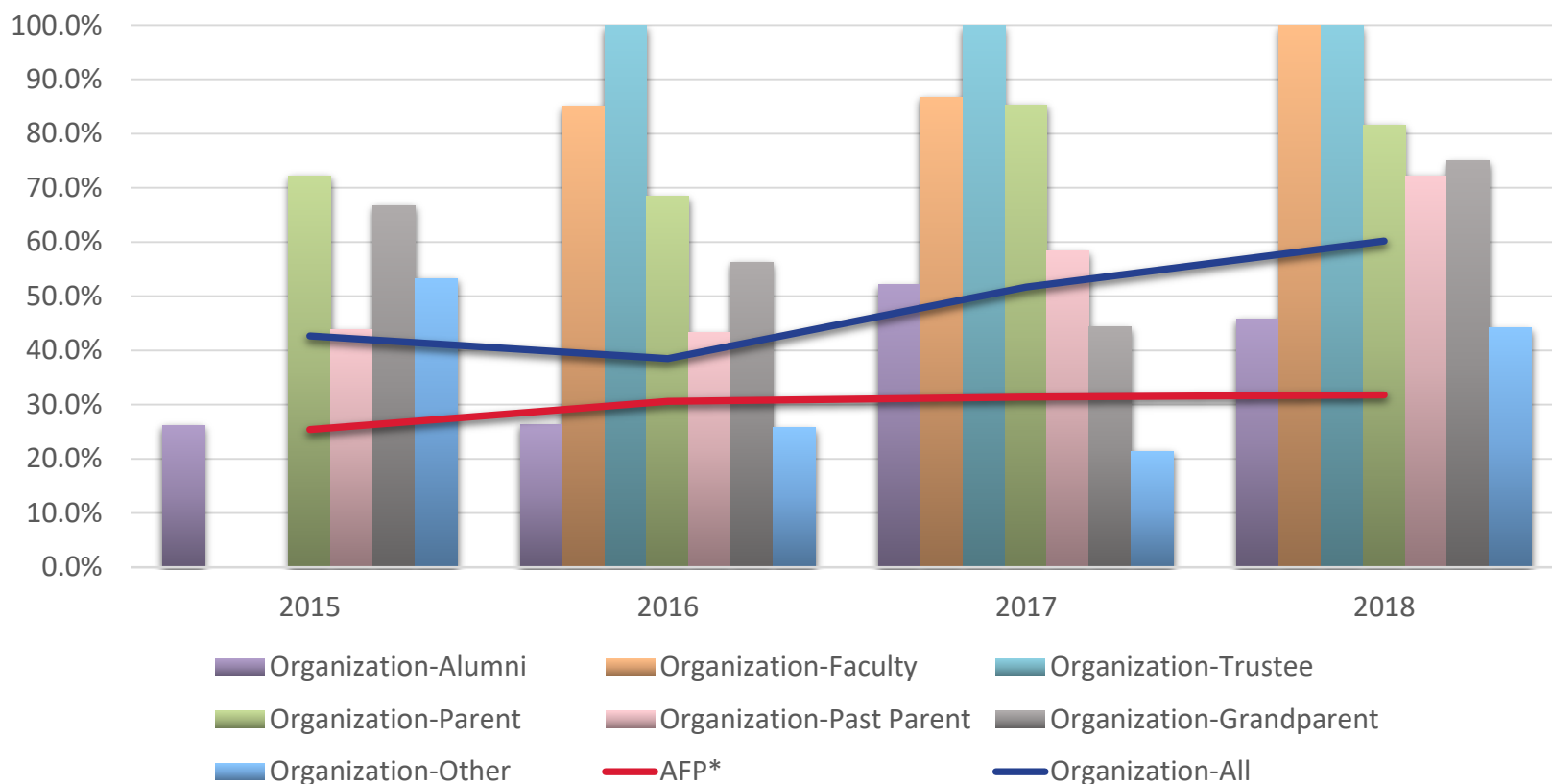
Segment: All



NEW DONOR RETENTION BENCHMARKING

New Donor Retention Rate: Percentage of donors whose first gift was last year and have given again this year

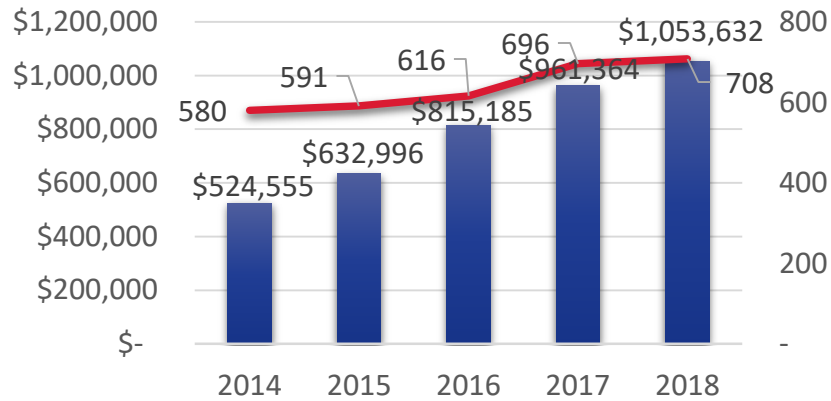
New Donor Retention



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Renewal of Last Year's Multi-Year Donors

Segment: All



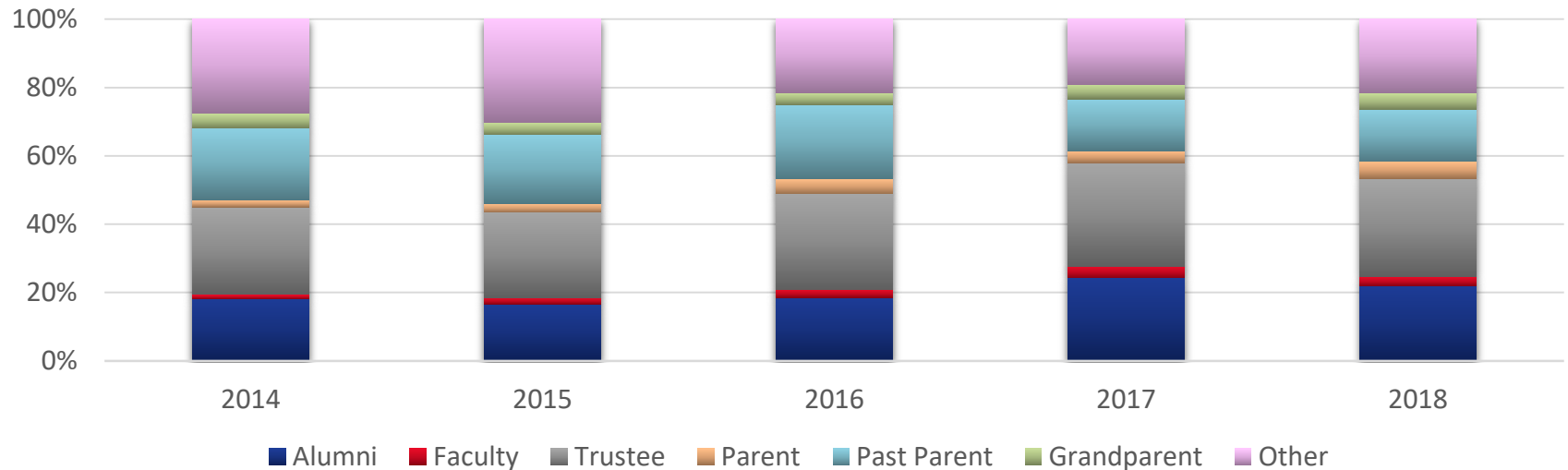
Period	FY 2015	FY 2016	FY 2017	FY 2018
# of Renewals in Prev Year	832	824	911	959
# Renewed	591	616	696	708
Renewal %	71.0%	74.8%	76.4%	73.8%

Fiscal Year

■ Dollars ■ Number of Donors

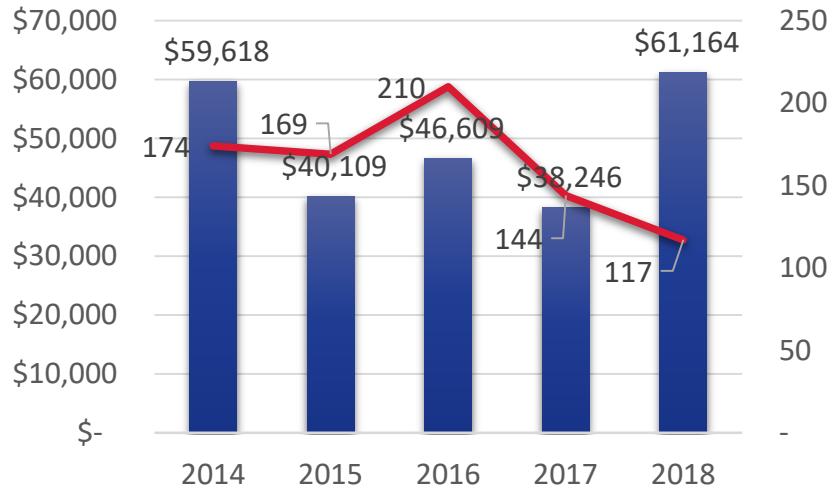
Renewal of Last Year's Multi-Year Donor Dollars

Segment: All



Recovery of Lapsed Donors

Segment: All

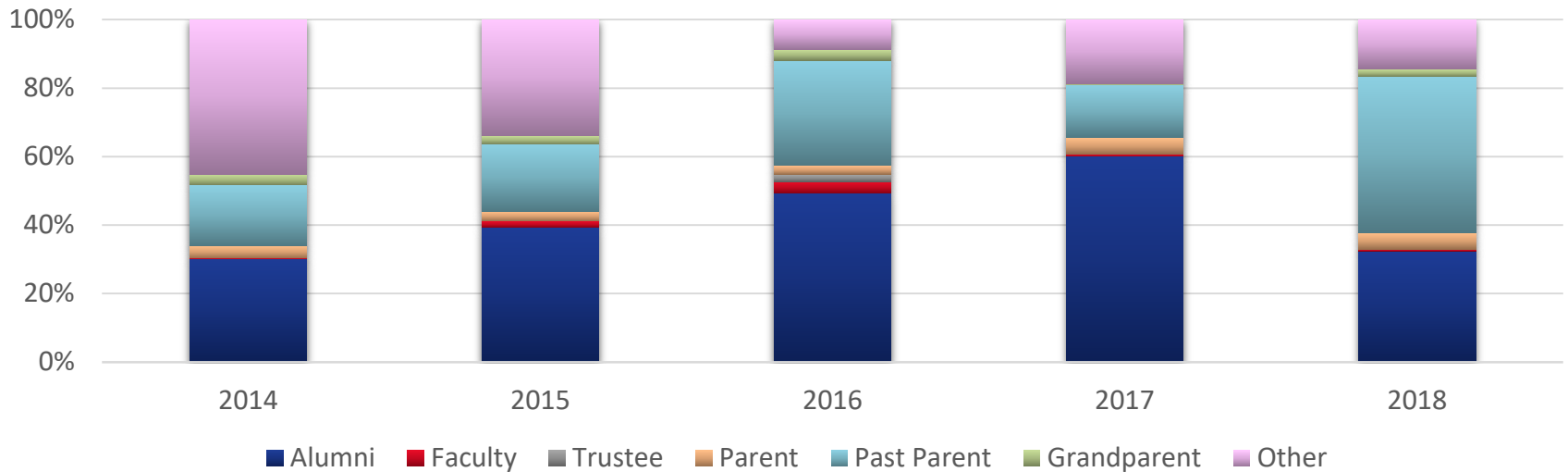


Period	FY 2015	FY 2016	FY 2017	FY 2018
# of Lapsed Donors	1,081	1,000	963	927
# Recovered	169	210	144	117
Recovered %	15.63%	21.00%	14.95%	12.62%

Fiscal Year

Recovery of Lapsed Donor Dollars

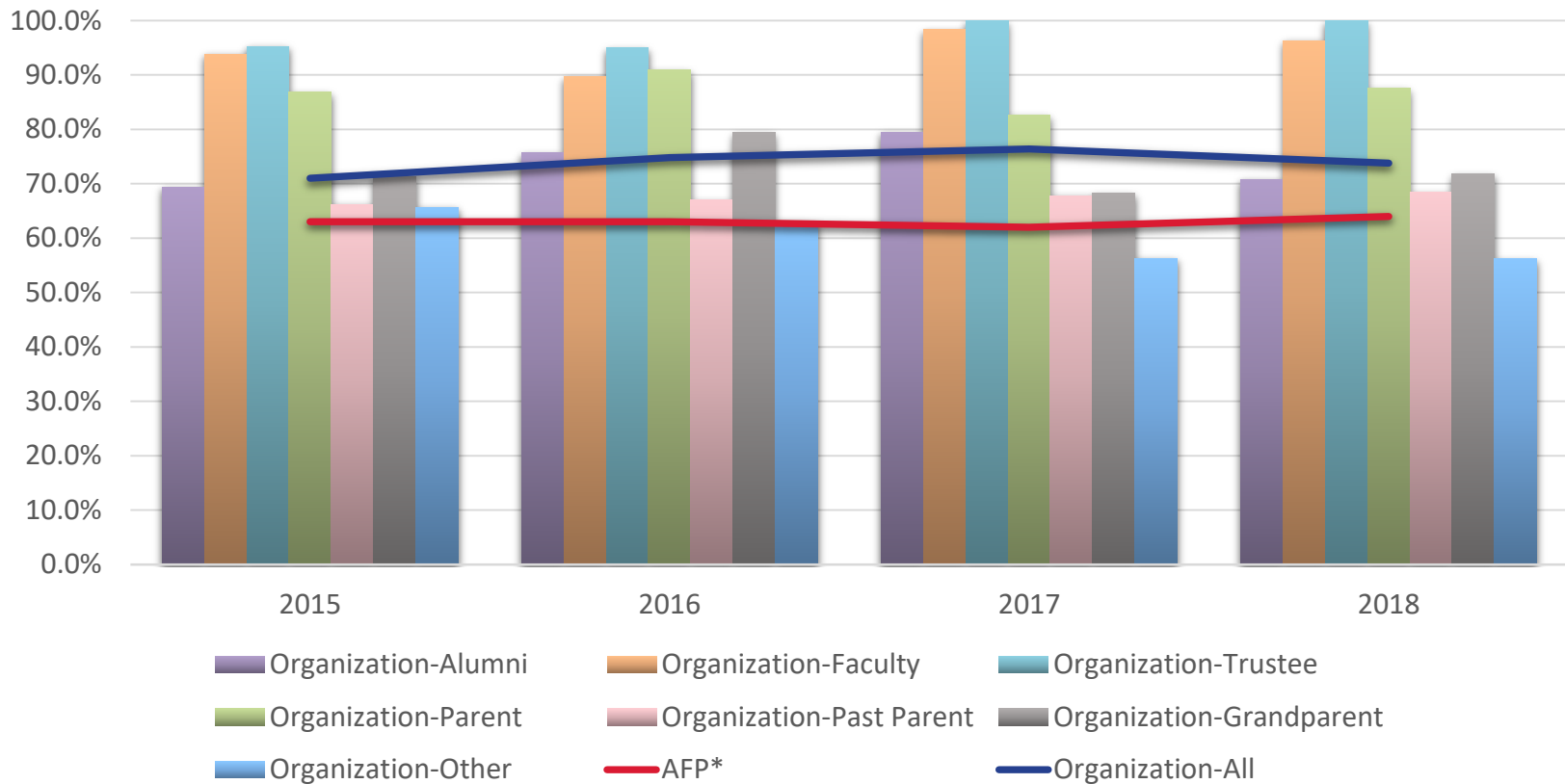
Segment: All



REPEAT RETENTION BENCHMARKING

Repeat Retention Rate: Percentage of donors gave last year and have given again this year, excluding new donors

Repeat Retention

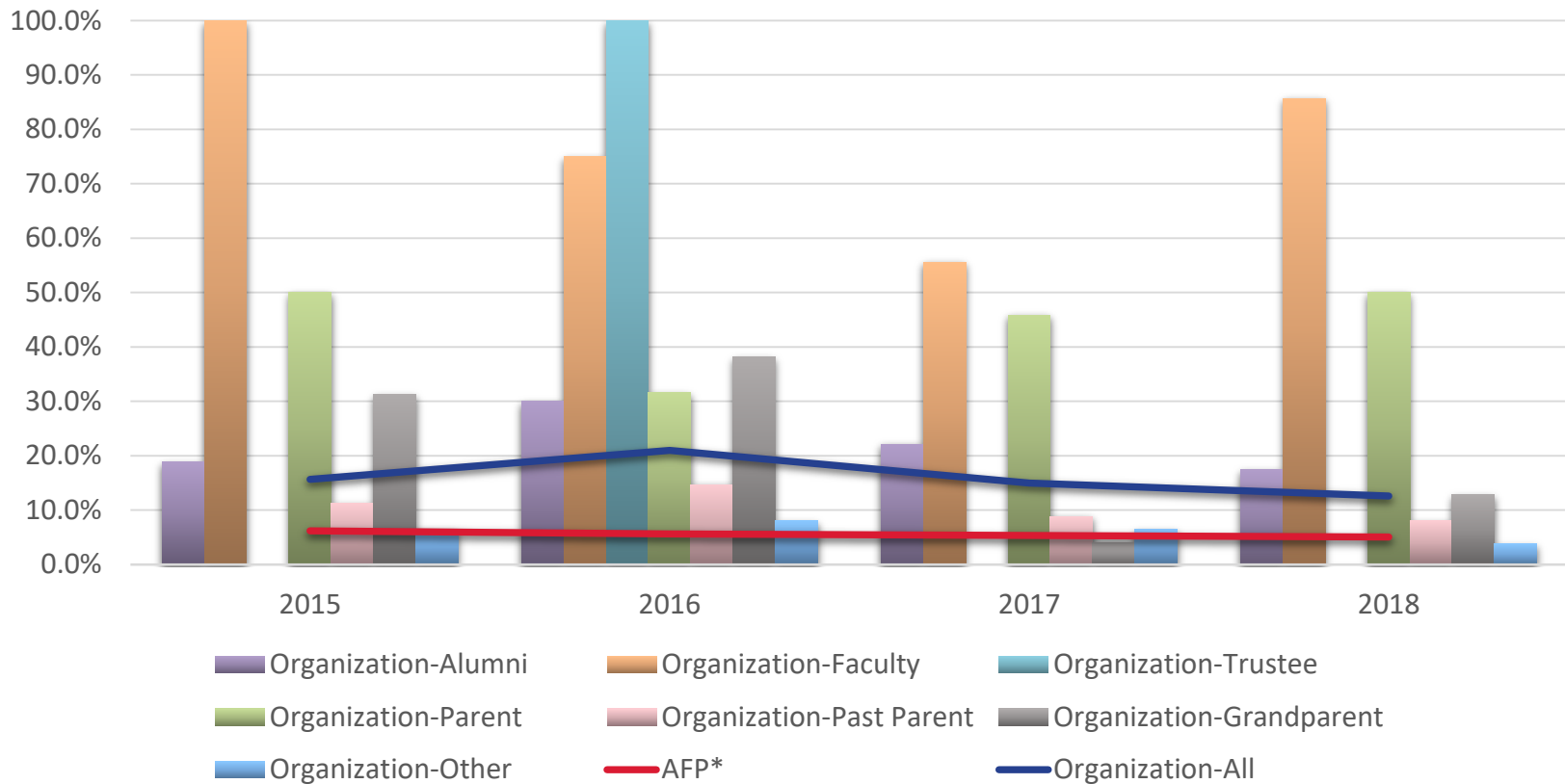


*The Association of Fundraising Professionals 2017 compilation of results from over 8,000 organizations with over 7 million donors and over \$7 billion in gifts

RECAPTURE RATE BENCHMARKING

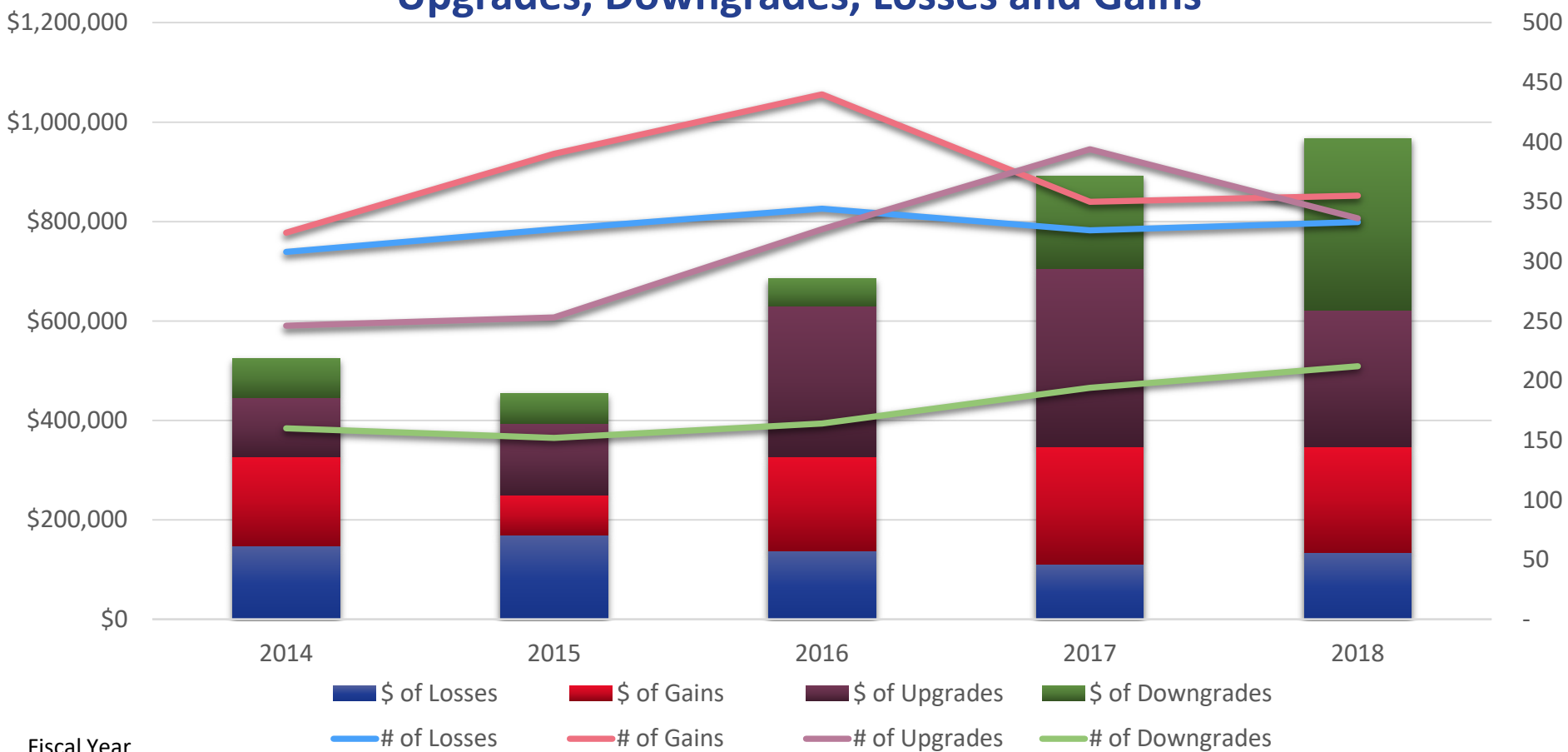
Recapture Rate: Percentage of previously lapsed donors who gave this year

Recapture Rate



*The Association of Fundraising Professionals 2017 compilation of results from over 8,000 organizations with over 7 million donors and over \$7 billion in gifts

Upgrades, Downgrades, Losses and Gains

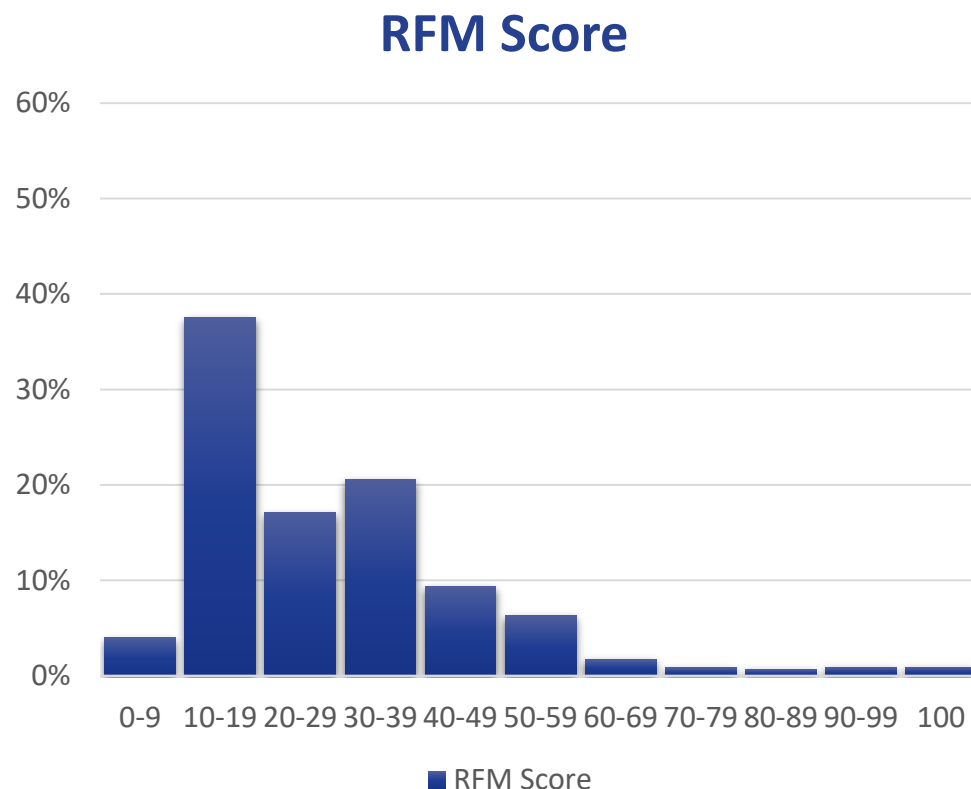


Fiscal Year

	2014	2015	2016	2017	2018
\$ of Upgrades	\$118,850	\$143,633	\$302,395	\$358,043	\$275,013
\$ of Downgrades	\$79,393	\$59,146	\$55,077	\$186,607	\$345,278
\$ of Losses	\$147,408	\$169,047	\$138,234	\$111,037	\$134,716
\$ of Gains	\$179,233	\$81,594	\$188,659	\$236,400	\$212,125
NET	\$71,282	-\$2,966	\$297,743	\$296,799	\$7,144

RFM (RECENCY, FREQUENCY, MONETARY) ANALYSIS

RFM Summary	Count	% of Total
0-9	123	4.03%
10-19	1,146	37.55%
20-29	522	17.10%
30-39	628	20.58%
40-49	286	9.37%
50-59	192	6.29%
60-69	53	1.74%
70-79	26	0.85%
80-89	21	0.69%
90-99	27	0.88%
100	28	0.92%



An RFM score ≥ 80 indicates that a donor is excelling in all categories of the RFM analysis and is one of your most valuable donors

By Year of Last Gift			
Year of Last Gift	# of Last Gift	# of Renewals	% Renewed
2009	143	4	2.8%
2010	221	1	0.5%
2011	162	6	3.7%
2012	218	11	5.0%
2013	150	8	5.3%
2014	191	10	5.2%
2015	260	32	12.3%
2016	326	67	20.6%
2017	1,165	832	71.4%

Multi-Year Donors		
Years of Giving	# of Donors	% of Donors
1	1,081	35.4%
2	477	15.6%
3	335	11.0%
4	253	8.3%
5	159	5.2%
6	169	5.5%
7	157	5.1%
8	115	3.8%
9	118	3.9%
10	188	6.2%

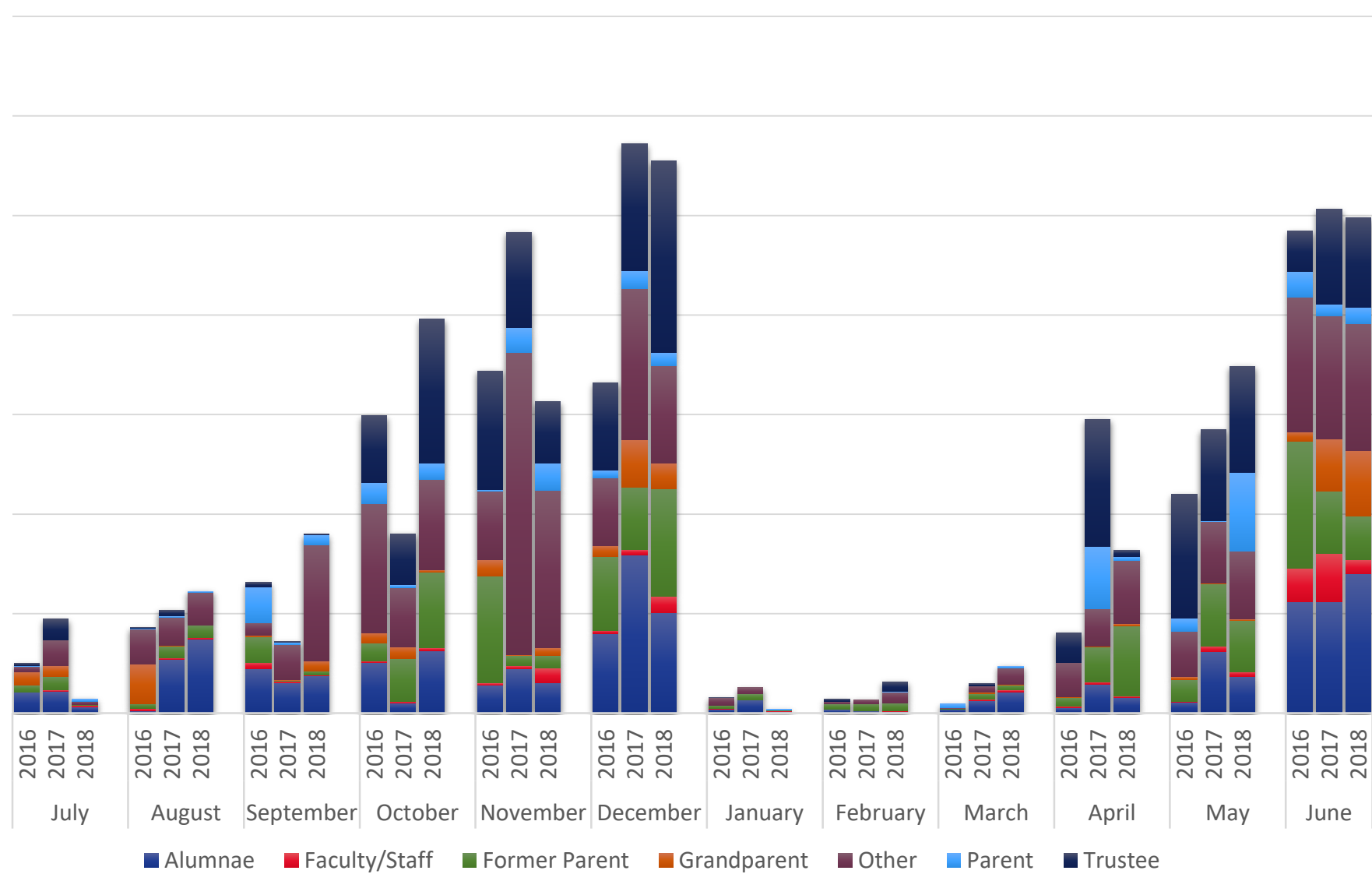
Gift Amounts by Year of New Donor

Year Acquired	# of Donors	2014	2015	2016	2017	2018	Totals	Ave. Value per donor
2014	150	\$119,615	\$14,810	\$24,642	\$17,645	\$19,331	\$196,042	\$1,307
2015	221		\$41,485	\$28,398	\$42,502	\$39,278	\$151,664	\$686
2016	230			\$142,051	\$117,612	\$115,637	\$375,299	\$1,632
2017	206				\$198,154	\$70,667	\$268,821	\$1,305

Retention of First-Time Donors

Year Acquired	2014	2015	2016	2017	2018	% Retained
2014	150	61	58	58	46	31%
2015		221	78	70	67	30%
2016			230	104	98	43%
2017				206	118	57%

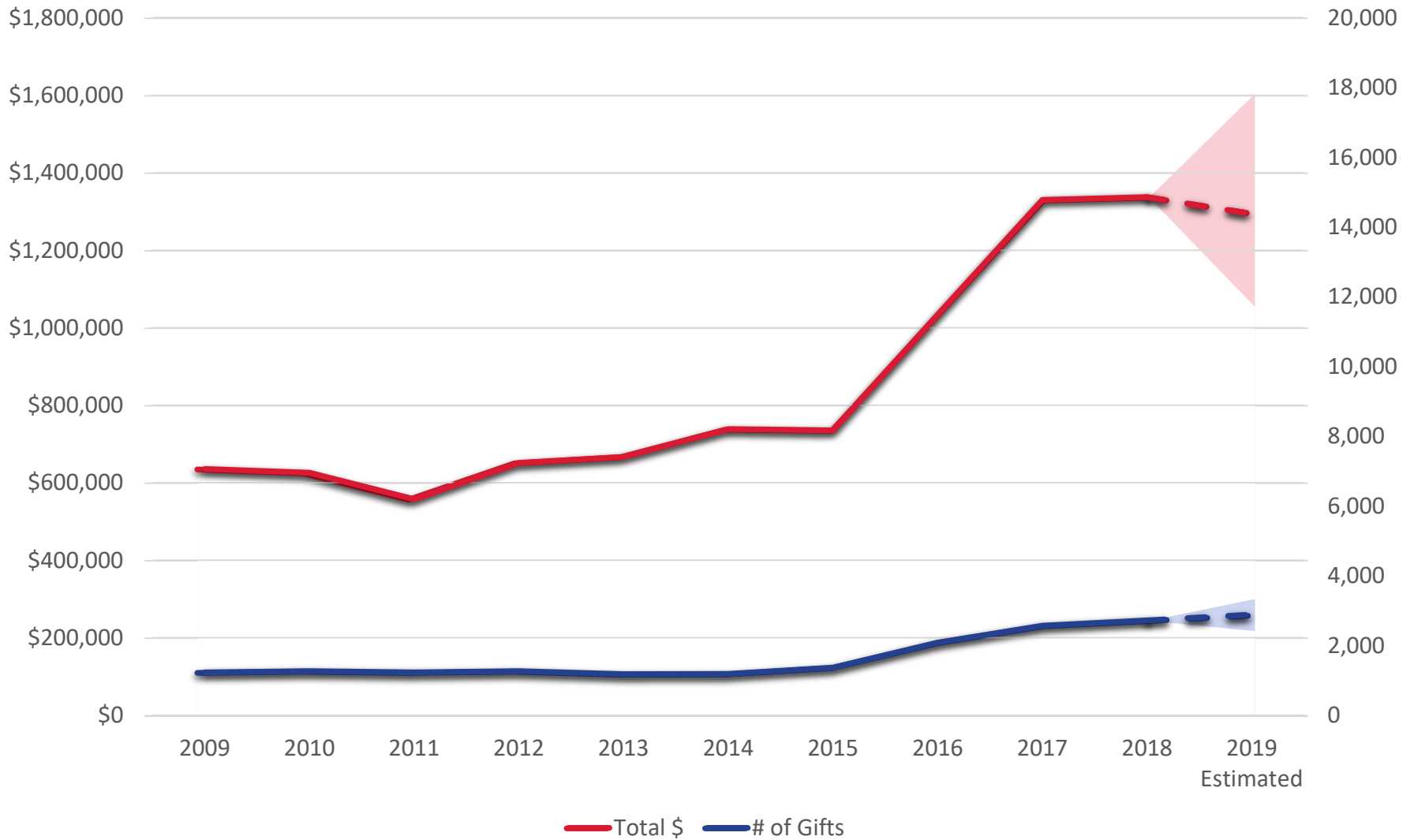
Gift Amount by Month and Segment



FORECAST FOR FY 2019

Based on a 12-period moving average of both the value and growth rate.

FY 2019 Forecast



Gift History						Segment: All
Fiscal Year	# of Gifts	Total \$	Avg. Gift Value	# of Donors	Avg. Donor Value	Avg. # of Gifts per Donor
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2010	1,270	\$626,063	\$492.96	1,144	\$547.26	1.11
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2017	2,569	\$1,330,041	\$517.73	1,165	\$1,141.67	2.21
2018	2,724	\$1,337,185	\$490.89	1,187	\$1,126.52	2.29
2019 Estimate	2,884	\$1,293,995	\$448.68	1,196	\$1,081.94	2.41
Grand Total	18,995	9,606,242				

RECOMMENDATIONS

Solicit Donors 6 Years Back *Exception:* Parents, Past Parents, Grandparents 3 Yrs.

Increase \$ Value of Loyal Donors—Celebrate Loyalty at All Levels—188 Have Not Missed in 10 Years

Slow the loss of First-Time Renewers in Year Two—Give Extra Contact for Two Years

Slow Downgrades—Show the Risk of Not Giving and Giving Less

Amplify Segmented Messaging