



Donor Data Analytics for Year-End Fundraising Cheat Sheet

Overall Year-End Campaign	Outputs to Showcase	Timing
Revenue Raised	Total Raised by Appeal Average & Median Gift by Appeal Total Number of Donors Participating (New, Retained, Recovered)	After all gifts have been entered (In the New Year)
Donors Participating	Upgrade/Downgrade Rates # New Donors & Median Gift # Recovered Donors & Median Gift # Retained Donors & Median Gift	After all gifts have been entered (In the New Year)
Final Appeal Reports	Side-by-side comparison of all year-end appeals that includes: <ul style="list-style-type: none"> • Revenue • Number of Donors • Median & Average Gift • Response Rate • Total Hard Costs • ROI 	After all gifts have been entered (In the New Year)
Proactive Reports	Outputs to Showcase	Cadence
Report for Each Appeal (including double drops & email follow-ups)	Total Raised Response Rate # Donors Participating # New Donors & Median Gift # Recovered Donors & Median Gift # Retained Donors & Median Gift	Weekly (not Friday)
Individuals who gave \$5-\$499 last fiscal year but nothing this fiscal year	Name Total Giving Last Fiscal Year Lifetime Giving Last Gift Date & Designation Address Phone/Email	December 1 (work with your team to figure out how to engage this list)
Individuals who gave \$500+ last fiscal year but nothing this fiscal year	Name Total Giving Last Fiscal Year Lifetime Giving Last Gift Date & Designation Address Phone/Email	December 1 (work with your team to figure out how to engage this list, especially the \$1,000+ donors who are about to lapse)