

Blackbaud[®]

Measure Donor Retention In The Raiser's Edge

Thursday – September 24, 2009

Please silence your phone line by
pressing ***6** or **mute** on your phone

There will be an opportunity at the end of the
session for you to un-mute your phone for the Q and A

Please do not place the call on hold

Measure Donor Retention In
The Raiser's Edge
Thursday – September 24, 2009

Blackbaud Representative:

Ron Rivers – **Solutions Engineer**



Presentation Agenda

- Organizational Tools Available on the Homepage
- Standard Workflow Procedures
- AFP Fundraising Effectiveness Project (FEP)
- Fundraising Effectiveness Project Plug-In (RE)
- FEP Data Submission
- Analyzing Your Current Fundraising Efforts
- Acquisition, Cultivation and Retention
- How Blackbaud Can Help
- Q & A

Organizational Tools Available on the Homepage

The screenshot displays the 'The Raiser's Edge' software interface. The window title is 'The Raiser's Edge' and the user is logged in as 'Welcome Ron Rivers'. The interface includes a navigation sidebar on the left with options like Home, Records, Query, Export, Reports, Mail, Batch, Admin, Config, Scanning, NetSolutions, Dashboard, Data Health Center, Web Services, and Plug-Ins. The main content area features a 'Customize Home Page' section with a 'Quick Find Constituent' search bar and two sections: 'Favorites' and 'Action Reminders'. The 'Action Reminders' section is circled in red and contains a table of tasks.

Follow-up?	Complete	Date	Category	Action Type	Constituent/Event/Appeal	Phone	Email	Solicitor Name
<input type="checkbox"/>	<input type="checkbox"/>	03/18/2009	Mailing	Brochure Request	Bruce Willis	898-234-0987	bruce@aol.com	Crenshaw, Ellen
<input type="checkbox"/>	<input type="checkbox"/>	03/18/2009	Meeting	Follow-Up Facility Visit/Tour	Ronald Rivers	843-216-6200	ron.rivers@blackbaud.com	Tidwell, Andrea
<input type="checkbox"/>	<input type="checkbox"/>	03/18/2009	Phone Call	Follow-Up	Kathleen Bently	404-864-2522	KatBently@yahoo.com	Hernandez, Robert
<input type="checkbox"/>	<input type="checkbox"/>	03/18/2009	Meeting	Initial Facility Visit/Tour	Joseph Ames	205-566-1254	JPdiresta@net.com	Hensley, Cole
<input type="checkbox"/>	<input type="checkbox"/>	03/18/2009	Phone Call	Return Referral	Warren Buffett	619-402-5589	wbuffett@comcast.net	Ames, Joseph
<input type="checkbox"/>	<input type="checkbox"/>	03/18/2009	Phone Call	New Request	Dan Mombrea	843-224-9325	dan.mombrea@blackbaud.com	Anderson, Matthew
<input type="checkbox"/>	<input type="checkbox"/>	03/18/2009	Meeting	Initial Facility Visit/Tour	Susan Keating	987-795-1675	skeating@roadrunner.com	Andrews, Allison

Organizational Tools Available on the Homepage

The Raiser's Edge

File Edit View Go Favorites Tools Help

Back Forward Open in separate window

Welcome Ron Rivers

Customize Home Page Refresh Cancel

(Build 5026) Blackbaud Demo

- Home
- Records
- Query
- Export
- Reports
- Mail
- Batch
- Admin
- Config
- Scanning
- NetSolutions
- Dashboard
- Data Health Center
- Web Services
- Plug-Ins
- Help

Donor Giving Analysis As of 03/20/2009 10:58:35 AM

	# Donors	Total
Repeat	35	\$41,185.00
Increased	47	\$3,809,265.00
New	6	\$6,550.00
Recovered	5	\$3,225.00
Decreased		
Total	93	\$3,860,225.00

Recent Major Gifts List (\$5000+) As of 03/20/2009 11:26:02 AM

Gift Date	Constituent Name	Amount	Fund
12/12/2009	Martin A. Schultz	\$65,000.00	SCIENCE CENTER FURN
12/12/2009	Scripps Howard Foundation	\$65,000.00	SCIENCE LAB EQUIP
11/19/2009	Allen J. Roy	\$5,000.00	Natural Disaster Relief Fund
11/19/2009	Ira M. Rosenberg	\$50,000.00	ACQUISITION
11/19/2009	Ginger Rosenberg	\$5,000.00	2009 Annual Fund
11/15/2009	Mary Beth Richardson	\$5,000.00	Playground Site
11/15/2009	The Reading Corner	\$5,000.00	Natural Disaster Relief Fund
10/25/2009	Campbell A. Phan	\$1,000,000.00	SCIENCE
10/25/2009	Chad Patterson	\$5,500.00	Building Fund
10/25/2009	Lane A. Pembroke	\$1,000,000.00	LAB
09/25/2009	Mia Patras	\$5,000.00	Playground Site

Appeal Package Response As of 03/20/2009 11:28:43 AM

Appeal	No. Solicited	No. Gifts	Total Gift Amt.
2009 Direct Mail Appeal	1063	17	\$7,435.00

Package	No. Donors	No. Solicited	No. Gifts	Total Gift Amt.
Post Card to General Public	5	362	9	\$1,835.00
Major Donor Letter w/Follow Up Visit	3	48	5	\$4,250.00
Letter to Active Constituents	3	583	3	\$1,350.00

Solicitor Performance Graph As of 03/20/2009 11:41:46 AM

Solicitor	Total Gift Amt.
Andrews, Allison	\$1,350.00
Bach, Julie	\$4,250.00
Hunter, Earl	\$1,835.00
Miller, Cynthia	\$1,350.00
Sinclair, Anne	\$4,250.00

Welcome to The Raiser's Edge 7

Standard Workflow Procedures

Folders

The screenshot shows the 'The Raiser's Edge' application window. The interface includes a menu bar (File, Edit, View, Go, Favorites, Tools, Help), a navigation bar (Back, Forward, Open in separate window), and a sidebar with various tool icons (Home, Records, Query, Export, Reports, Mail, Batch, Admin, Config, Scanning, NetSolutions, Dashboard, Data Health Center, Web Services, Plug-Ins). The main content area is titled 'Welcome Ron Rivers' and contains a 'Quick Find Constituent' search box, a 'Favorites' section with a tree view of folders, and an 'Action Reminders' table.

In the 'Favorites' section, the 'Daily Standard Workflow' folder is highlighted with a red oval. The tree view shows the following structure:

- Constituents
 - Create a new gift
 - Create a new individual
 - Create a new organization
 - Create a new action
 - Robert Carlos Hernandez, M.D.
 - W.K. Kellogg Foundation
 - AFP
 - Daily Standard Workflow**
 - Daily Gift Batch
 - Acknowledgement Letters - Conditional by Amount
 - Mailing Labels
 - Post to General Ledger
- Action List & Reports
 - Lists
 - Major Donors \$15,000 Giving
 - Gifts This Week
 - Volunteers
 - Board of Directors
 - Analytical Reports
 - First/Greatest/Latest - 2008
 - LYBUNT - Gave Last Year but not This Year
 - New Donors Report
 - 5 Years Consecutive Donors Report
 - SYBUNT - Gave Some Year But Not This
- Favorite Reports
 - Fund Performance Analysis
 - Donor Category Report
 - Campaign Reports
 - Campaign Performance Analysis
 - Campaign Progress Report
 - Campaign Comparison Report
 - Campaign Summary
 - Director of Development Reports
 - Constituent Profile
 - Board Member Directory
 - Volunteer Directory
- Misc

The 'Action Reminders' table displays the following data:

Follow-up?	Complete	Date	Category	Action Type	Constituent/Event/Appeal	Phone	Email	Solicitor Name
	<input type="checkbox"/>	03/18/2009	Mailing	Brochure Request	Bruce Willis	898-234-0987	bruce@aol.com	Crenshaw, Ellen
	<input type="checkbox"/>	03/18/2009	Meeting	Follow-Up Facility Visit/Tour	Ronald Rivers	843-216-6200	ron.rivers@blackbaud.com	Tidwell, Andrea
	<input type="checkbox"/>	03/18/2009	Phone Call	Follow-Up	Kathleen Bently	404-864-2522	KatBently@yahoo.com	Hernandez, Robert
	<input type="checkbox"/>	03/18/2009	Meeting	Initial Facility Visit/Tour	Joseph Ames	205-566-1254	JPdiResta@net.com	Hensley, Cole
	<input type="checkbox"/>	03/18/2009	Phone Call	Return Referral	Warren Buffett	619-402-5589	wbuffett@comcast.net	Ames, Joseph
	<input type="checkbox"/>	03/18/2009	Phone Call	New Request	Dan Mombrea	843-224-9325	dan.mombrea@blackbaud.com	Anderson, Matthew

Standard Workflow Procedures

Batch Gift Entry

Batch 715

File Edit View Gift Constituent Favorites Tools Help

Save and Close

Constituent Na...	Amount	Date	Campaign	Fund	Package	Appeal	GL post date		Field	Value
*		03/20/2009	Annual Campaign	2009 Annual Fund		2009 Direct Mail Appeal	03/20/2009	Not Posted	First Name	Robert
Rivers, Ronald	\$100.00	03/20/2009	Annual Campaign	2009 Annual Fund	Letter to Active Constituents	2009 Direct Mail Appeal	03/20/2009	Not Posted	Last Name	Hernandez
Mombrea, Dan	\$75.00	03/20/2009	Annual Campaign	2009 Annual Fund	Letter to Active Constituents	2009 Direct Mail Appeal	03/20/2009	Not Posted	Address Address Lines	1834 Bairds Cove
Bently, Kathleen	\$250.00	03/20/2009	Annual Campaign	2009 Heart Program	Letter to Active Constituents	2009 Direct Mail Appeal	03/20/2009	Not Posted	Address City	Charleston
Hernandez, Robert	\$5,000.00	03/20/2009	Annual Campaign	2009 Annual Fund	Major Donor Letter w/Follow Up Visit	2009 Direct Mail Appeal	03/20/2009	Not Posted	Address Type	Home
Roy, Allen	\$5,000.00	03/20/2009	Annual Campaign	2009 Annual Fund	Major Donor Letter w/Follow Up Visit	2009 Direct Mail Appeal	03/20/2009	Not Posted	Address ZIP	29414-5824
									Birth date	03/14/1950
									Deceased	<input type="checkbox"/>
									Marital status	Married

Commit Gift Batch

1: General | 2: Payments | 3: Recurring Batch

Step 1: Enter general information

Validate batch before committing

Create gift query of committed gifts

Create a new batch of exceptions

Create control report | Detail | Preview | Print

Delete batch after committing

Automatically apply gifts to pledges and recurring gifts

Only apply gifts to pledges and recurring gifts with the same fund(s)

Batch Statistics

Running number of gifts:	5	Number of matching gifts:	0
Running amount:	\$10,425.00	Matching gift amount:	\$0.00
Created on:	03/20/2009 2:56:50 PM	Times committed:	0
Last changed on:	03/20/2009 3:13:27 PM	Last committed on:	
Created by:	Ron Rivers		

< Back | Next > | Cancel | **Commit Now**

Press F8 for constituent window. | Gift 1 of 5 | Running Total: \$10,425.00 | Hidden columns exist

Standard Workflow Procedures

Acknowledgement Letters

The Raiser's Edge

File Edit View Go Favorites Tools Help

Back Forward Open in separate window

Welcome Ron Rivers

Customize Home Page

Quick Find Constituent:

Favorites

- Constituents
 - Create a new gift
 - Create a new individual
 - Create a new organization
 - Create a new action
 - Robert Carlos Hernandez, M.D.
 - W.K. Kellogg Foundation
 - AFP
- Daily Standard Workflow
 - Daily Gift Batch
 - Acknowledgement Letters - Cond...
 - Mailing Labels
 - Post to General Ledger

Action Reminders

Follow-up?	Complete	Date	Action	Constituent	Contact	Solicitor Name	
	<input type="checkbox"/>	03/18/2009	Meeting	Initial Facility Visit/Tour	Joseph Ames	205-566-1254 JPdiresta@net.com	Hensley, Cole
	<input type="checkbox"/>	03/18/2009	Phone Call	Return Referral	Warren Buffett	619-402-5589 wbuffett@comcast.net	Ames, Joseph
	<input type="checkbox"/>	03/18/2009	Phone Call	New Request	Dan Mombrea	843-224-9325 dan.mombrea@blackbaud.com	Anderson, Matthew

Weekly Donor Thank You Letters-conditional amount

File Edit Favorites Help

Send to Word merge wizard

6: Ind. Address 7: Org. Address 8: PostalSaver 9: Format
1: General 2: Fields to Include 3: Filters 4: Gift Types 5: Attributes

Include... **All records**

Include Gifts with these Dates

Date to use: Gift date Why are gifts missing from my donor acknowledgement letter?
Date: This week

Soft Credit Gifts To

Donor
 Soft credit recipients Use distribution on gift
 Both Use distribution on gift

Include these Constituents

Inactive constituents
 Deceased constituents
 Constituents with no valid address

Credit Matching Gifts To

Donor MG Company Both

Create Constituent output query

< Back Next > Cancel

Export... Merge...

start

The Rais... RE: Cred... Microsof... Inbox - ... Weekly ... 4:09 PM

Standard Workflow Procedures

Mailing Labels

The Raiser's Edge

File Edit View Go Favorites Tools Help

Back Forward Open in separate window

Welcome Ron Rivers

Customize Home Page

Quick Find Constituent:

Favorites

- Constituents
 - Create a new gift
 - Create a new individual
 - Create a new organization
 - Create a new action
 - Robert Carlos Hernandez, M.D.
 - W.K. Kellogg Foundation
 - AFP
- Daily Standard Workflow
 - Daily Gift Batch
 - Acknowledgement Letters - Con
 - Post to General Ledger
 - Mailing Labels
 - Gifts This Week

Action Reminders

Follow-up?	Complete	Date					
	<input type="checkbox"/>	03/18/2009					
	<input type="checkbox"/>	03/18/2009					
	<input type="checkbox"/>	03/18/2009	Phone Call Follow-Up	Kathleen Beniv	404-864-2522	kabentiv@yahoo.com	Hernandez, Robert
	<input type="checkbox"/>	03/18/2009	Meeting Initial Facility Visit/Tour	Joseph Ames	205-566-1254	JPdiresta@net.com	Hensley, Cole
	<input type="checkbox"/>	03/18/2009	Phone Call Return Referral	Warren Buffett	619-402-5589	wbuffett@comcast.net	Ames, Joseph

Mailing Labels

File Edit Favorites Help

Org. Address Segment PostalSaver Format

1: General 2: Fields to Include 3: Filters 4: Attributes 5: Ind. Address

Create for: Constituents Relationships Honor/Memorials Participants

Include... **Gifts for 'This Week'**

Form type: Type Size Across Down Description

Avery® 5161 1 x 4 2 10 Laser Address

Form font: Times New Roman Start printing in Row: 1

Font size: 10 Column: 1

Head of Household Processing

Mail only to constituents marked 'Head of Household'

Mail to first constituent found

Mail to both constituents separately

Include these Constituents

Inactive constituents

Deceased constituents

Constituents with no valid address

Create output query

< Back Next > Cancel Print Preview Layout

Solicitor Name

[Crenshaw, Ellen](#)

[Tidwell, Andrea](#)

[Hernandez, Robert](#)

[Hensley, Cole](#)

[Ames, Joseph](#)

Welcome to The Raiser's Edge 7

start The ... RE: ... Inbo... FW: ... Micr... Mail... 4:35 PM

Standard Workflow Procedures

Post to General Ledger

The screenshot displays the 'The Raiser's Edge' web application interface. On the left is a navigation menu with options like Home, Records, Query, Export, Reports, Mail, Batch, Admin, Config, Scanning, NetSolutions, Dashboard, Data Health Center, Web Services, and Plug-Ins. The main content area shows the 'Administration' section with a list of administrative tasks. A modal dialog box titled 'Post to General Ledger' is open, showing configuration options for posting gifts to the financial ledger. The dialog has tabs for 'General', 'Gifts', and 'Format'. A red arrow points to the 'Post Gifts to the Financial Edge' radio button. Below this, there are options for 'What do you want to do with the transactions?' including 'Post to the Financial Edge' (checked), 'Create an export file' (checked), and 'Post the transactions in:' (set to 'Detail'). The 'Miscellaneous Information' section includes 'Group the transactions by:' (set to 'Batch'), 'Create exception query of gifts to be posted to closed accounting periods' (unchecked), 'Create exception report' (unchecked), and 'Create control report' (checked). At the bottom of the dialog are buttons for '< Back', 'Next >', 'Cancel', and 'Post Now'. Below the dialog, a help section titled 'Post to General Ledger' provides instructions: 'Post to General Ledger - This creates a file of gifts to be posted to Blackbaud's General Ledger. It also creates export files you can send to other programs. For more information, see [Posting to General Ledger](#). Want to know more about how to [set up the integration](#)?' The Windows taskbar at the bottom shows the Start button, system tray, and several open applications including 'The Raiser's Edge', 'RE: Credit Ca...', 'Microsoft Pow...', and 'Inbox - Micros...'. The system clock shows 4:01 PM.

Fundraising Effectiveness Project

What is it?

- The [Fundraising Effectiveness Project \(FEP\)](#) was launched in 2006 by AFP
- Designed to help nonprofit organizations measure, compare and maximize their annual growth in giving
- RE has a FEP plug-in that generates the information needed to participate in the Fundraising Effectiveness Survey

How can it help the NPO?

- Allows nonprofit organizations to make better-informed, growth-oriented budget decisions to boost donor revenue
- The basic FEP concepts:
 - Growth= Net of Gains – Losses
 - Growth in giving is increased by maximizing gains and by minimizing losses
- Participating in the survey, the NPO will receive the data when AFP publishes the report
- When report is released, it will enable NPOs to Benchmark: understand how they compared to other NPOs in 2008

AFP's Fundraising Effectiveness Project

Recent Findings from AFP:

- Donor retention remains the biggest stumbling block for most charity's fundraising efforts
- For every \$6 that charities raise in new gifts, they lose \$5 through donor attrition
- Based on respondents to the FEP, growth from year one to year two was 7.6%
- To read more about the findings of last year's findings, [click here](#), or if you would like to see a copy of the 2008 findings [go here](#).

Fundraising Effectiveness Project

RE Plug-In

The screenshot displays the 'The Raiser's Edge' application window. The title bar reads 'The Raiser's Edge' and the version is '(Build 6026) Blackbaud Demo'. The interface includes a menu bar (File, Edit, View, Go, Favorites, Tools, Help) and a navigation bar with 'Back', 'Forward', and 'Open in separate window' options. A left-hand navigation pane lists various modules: Home, Records, Query, Export, Reports, Mail, Batch, Admin, Config, Scanning, NetSolutions, Dashboard, Data Health Center, Web Services, and Plug-Ins. The 'Plug-Ins' module is highlighted with a red circle. The main content area shows a list of plug-ins under the heading 'Plug-Ins'. The 'Fundraising Effectiveness Project Plug-in' is circled in red. Below the list, a description of plug-ins is provided.

Plug-Ins

- Fundraising Effectiveness Project Plug-in
- Database Connection Viewer
- Sample Action Plug-in
- Copy User Settings
- Raiser's Edge 6 Post-Conversion Utility
- Import Recurring Gifts
- Nonconstituent Merge Utility
- Fund Graph
- What is a Plug-In?
- PaperSave® Print Coversheets from Query
- PaperSave® Export from Query
- Product Installer
- Read-Only Database Assistance Query Tool
- User Margin Utility

Plug-Ins

You can use plug-ins to help with various **Raiser's Edge** functions. For example, you can use the Post-Conversion Assistant to help clean up your database after conversion. You can also use the **RE API for Advanced Application Development** optional module to integrate **The Raiser's Edge** with plug-ins you create. **The Raiser's Edge** can host HTML, Active X, or spreadsheet documents in a wide variety of formats to work in conjunction with the program. You can use **RE API** to customize **The Raiser's Edge** to suit your needs.

Fundraising Effectiveness Project

Organization Info

Fundraising Effectiveness Project - Organization Information

Identification and contact information

Name of Organization: Blackbaud Demo

Contact Person:

Identification number:

Phone: (800) 468-8996

Country: United States

Email Address:

Zip: 29492

Organizational and professional staff affiliations (select all that apply)

AFP (Association of Fundraising Professionals) NCPG (National Committee on Planned Giving)

CASE (Council for Advancement and Support of Education) CRD (Council for Resource Development)

AHP (Association for Healthcare Philanthropy) Other (please specify)

ALDE (Association of Lutheran Development Executives)

Other information

Year development program initiated (YYYY):

Full-time Professional staff (Period 2):

Subsector or type of organization:

Full-time Support staff (Period 2):

Fundraising Expenses:

Consultant full-time equivalent (Period 2):

Full-time Volunteer fundraisers (Period 2):

Comments

OK Cancel

Fundraising Effectiveness Project

The Data

Fundraising Effectiveness Project

Period 1 Start: 01/01/2007 End: 12/31/2007
 Period 2 Start: 01/01/2008 End: 12/31/2008

All constituents Enter Your Organization Info

Category	Period 1 No. of Do...	Period 1 Amo...	Period 2 No. of Do...	Period 2 Amo...	Gains(Losses)	Gains(Losse...
New	0	\$0.00	12	\$15,489.00	\$15,489.00	
Recapture	0	\$0.00	5	\$460.00	\$460.00	
Upgrade	5	\$74,125.00	5	\$98,450.00	\$24,325.00	3:
Upgrade ...	1	\$3,220.00	1	\$4,695.00	\$1,475.00	4:
Same	65	\$3,724,940.00	65	\$3,724,940.00	\$0.00	(
Downgrade	18	\$3,120,580.00	18	\$1,055,501.00	(\$2,065,079....	(66
Lapsed new	11	\$519,475.00	0	\$0.00	(\$519,475.00)	(100

Number of gift transactions Period 1: 396 Number of gift transactions Period 2: 263 Preview All Data

Individuals Only

Category	Period 1 No. of Do...	Period 1 Amo...	Period 2 No. of Do...	Period 2 Amo...	Gains(Losses)	Gains(Losse...
New	0	\$0.00	9	\$14,760.00	\$14,760.00	
Recapture	0	\$0.00	4	\$385.00	\$385.00	
Upgrade	5	\$74,125.00	5	\$98,450.00	\$24,325.00	3:
Upgrade ...	1	\$3,220.00	1	\$4,695.00	\$1,475.00	4:
Same	53	\$3,631,480.00	53	\$3,631,480.00	\$0.00	(
Downgrade	17	\$3,120,480.00	17	\$1,055,421.00	(\$2,065,059....	(66
Lapsed new	10	\$508,475.00	0	\$0.00	(\$508,475.00)	(100

Number of gift transactions Period 1: 339 Number of gift transactions Period 2: 236 Preview Individual Data

Organizations Only

Category	Period 1 No. of Do...	Period 1 Amo...	Period 2 No. of Do...	Period 2 Amo...	Gains(Losses)	Gains(Losse...
New	0	\$0.00	3	\$729.00	\$729.00	
Recapture	0	\$0.00	1	\$75.00	\$75.00	
Same	12	\$93,460.00	12	\$93,460.00	\$0.00	0%
Downgrade	1	\$100.00	1	\$80.00	(\$20.00)	(20%)
Lapsed new	1	\$11,000.00	0	\$0.00	(\$11,000.00)	(100%)
Lapsed ot...	27	\$2,852,360.00	0	\$0.00	(\$2,852,360....	(100%)
Total (Calc.)	41	\$2,956,920.00	17	\$94,344.00	(\$2,862,576....	

Number of gift transactions Period 1: 57 Number of gift transactions Period 2: 27 Preview Organization Data

Send Close

FEP Identifies:

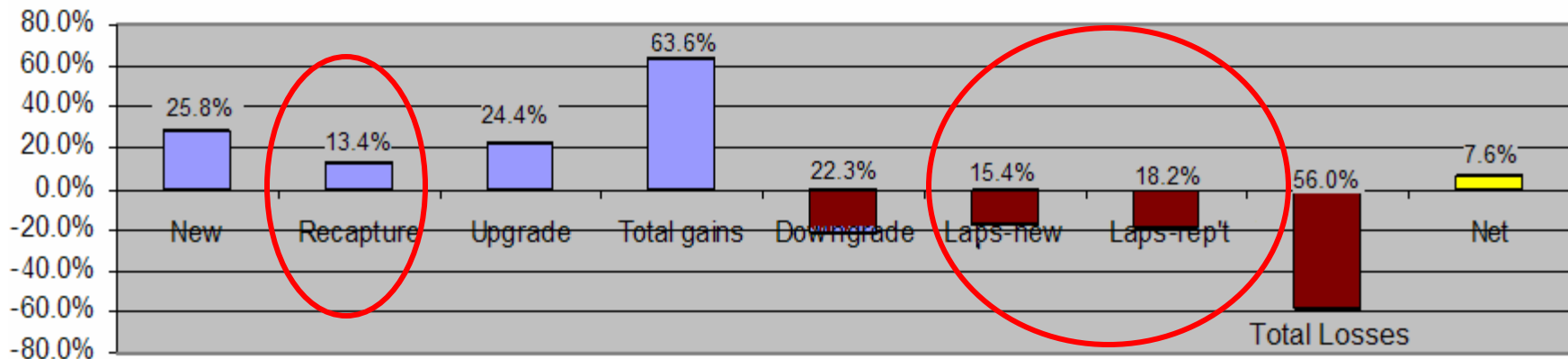
- **New donors in current year**
- **Recaptured donors (former donors did not give in previous year)**
- **Upgraded donors (increased their gift from previous year)**
- **Same Gifting as last year**
- **Downgraded donors (gave less in the current year than last yr)**
- **Lapsed new donors (previous year who did not give current yr)**
- **Lapsed repeat donors (repeat donors in previous year who did not give in current yr)**

AFP's Fundraising Effectiveness Project

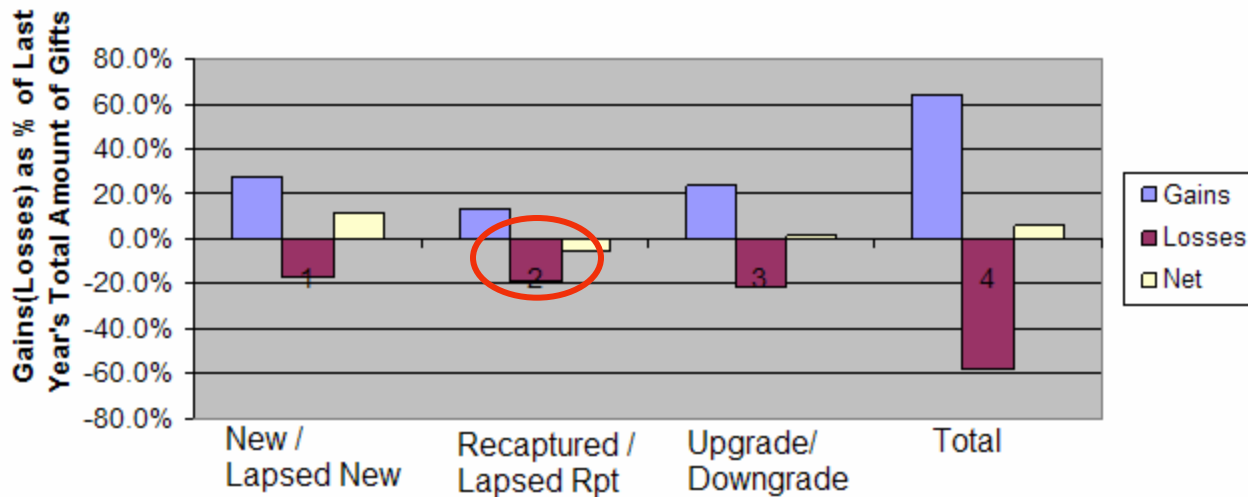
Notes on the Data

- Data reflect each organization's fiscal year
- Funds raised include
 - Cash gifts
 - Pledge payments
 - Recurring gift payments
 - Gifts of marketable securities
 - Gift portion of special event income
 - Gifts are counted whether they are unrestricted or restricted
- Funds raised exclude
 - Pledges and pledge balances
 - In-kind donations (such as equipment, materials, services or use of facilities)
 - Deferred gifts (such as known bequests and charitable remainder trusts or annuities)
 - Costs benefiting donors portion of special event income

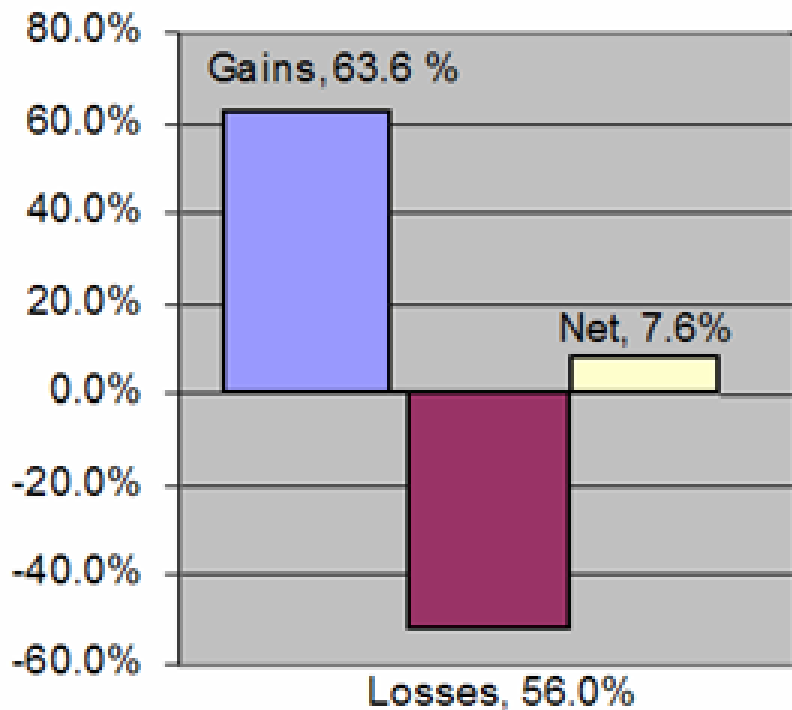
AFP's Gain & Loss Segments: The Importance of Retention!



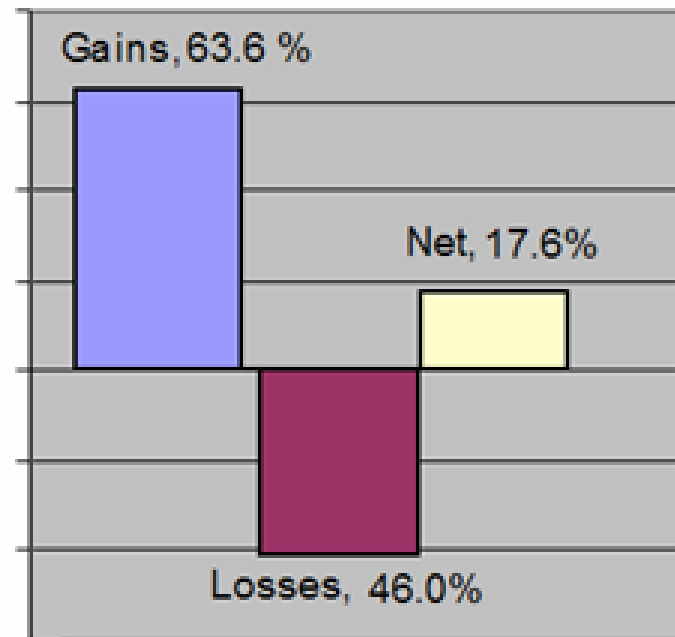
Gains, Losses and Net by Categories and Total



Decreasing the losses to increase net gains The Importance of Retention:



Losses without a focus on improved retention



A 10% reduction in losses increased net giving by 10%

Analyzing Your Efforts

- Fundraising Effectiveness Program Plug-In
- Fundraising Effectiveness Program Analyzer (Blackbaud)
- LYBUNT Report
- SYBUNT Report
- Comparative Report
- Non-Contributors Report
- New Donors Report
- Consecutive Years Report
- Top Donors Report
- Donor Category Report

How Blackbaud Can Help?

- Contact Blackbaud for Assistance with the FEP Performance Analyzer
- Training on Query and Reporting
- Consulting on Query and Reporting
 - Create a queries on each group (lapsed, new, upgraded)
 - Determine ask amounts
 - Establish a communication plan
 - Continue to do analysis on each group type
- Add NetSolutions or BBNC as part of the communication strategy
- Consulting on how to set up a Major Giving Program
- Assessment engagement
- Search Module to enable Major Giving Program
- Refer to Target Analytics for ProspectPoint and WealthPoint
- Refer to Data Enrichment Services for List Acquisition

Captured Data for Sample Organization 2007 & 2008

Upgrades, Downgrades & Lapsed Appears to be an Area of Opportunity for Improvement

2007-2008 (All)

Category	2007 No of Donors	2007 Amount	2008 No of Donors	2008 Amount	Gains(Losses)	Gains(Losses)%
New	0	\$0	1567	\$736,157	\$736,157	55.4%
Recapture	0	\$0	580	\$187,038	\$187,038	14.1%
Upgrade	121	\$209,310	121	\$339,450	\$130,140	9.8%
Upgrade new	97	\$20,117	97	\$60,377	\$40,260	3.0%
Same	98	\$201,865	98	\$201,865	\$0	0.0%
Same new	124	\$30,020	124	\$30,020	\$0	0.0%
Downgrade	119	\$468,453	119	\$165,386	-\$303,067	-22.8%
Downgrade new	55	\$13,602	55	\$7,370	-\$6,232	-0.5%
Lapsed new	1297	\$110,986	0	\$0	-\$110,986	-8.4%
Lapsed other	593	\$273,729	0	\$0	-\$273,729	-20.6%
Total (Calc.)	2504	\$1,328,082	2761	\$1,727,663	\$399,581	30.1%

Avg Gift Per 1	\$530.38
Avg Gift Per 2	\$625.74

Retained	614
Retention %	24.5%
New Rc/Lap	2.40
Upg / Dngd	0.55
Donor Var	\$136,309
Gift Var	\$263,272
Total Var\$	\$399,581

AFP Data 2007 - 2008

Vertical:

Health

of Orgs:

188

Category	2007 No of Donors	2007 Amount	2008 No of Donors	2008 Amount	Gains(Losses)	Gains(Losses)%
New			95,644	\$36,432,421	\$36,432,421	21.8%
Recapture			28,319	\$27,568,226	\$27,568,226	16.5%
Upgrade	26,255	\$29,236,212	26,255	\$67,717,490	\$38,481,278	23.0%
Same	20,755	\$14,982,069	20,755	\$14,982,069	\$0	0.0%
Downgrade	23,267	\$65,240,972	23,267	\$32,622,055	(\$32,618,917)	-19.5%
Lapsed new	77,967	\$25,258,427			(\$25,258,427)	-15.1%
Lapsed other	42,004	\$32,782,529			(\$32,782,529)	-19.6%
Total (Calc.)	190248	\$167,500,209	194,240	\$179,322,261	\$11,822,052	7.1%

Average gift	
2007	\$880.43
2008	\$923.20

Stats	
Retained Donors	70,277
Retention %	36.9%
New & Recap/ Lapsed	1.10
Upgrds / Dwn grds	2.08
Donor Qty Variance \$	\$3,514,680
Gift rate variance \$	\$8,307,372

Benchmark Performance Comparisons:

- 188 Health Organizations



Observations vs. Peers:



Strengths:

- Gains from New Donors 55% vs. 22%
- Total Overall gains 30% vs. 7.1%



Improvement:

- Increase Average Gift \$625 vs. \$923
- Retain Donors 24% vs. 37%
- Improve Upgrades/Minimize Downgrades

Questions?

For more information:

Contact your account manager

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Thank You for joining us!

