



# Insight

**Overall File  
Analysis**

# Overall File Analysis

SAMPLE CLIENT		LAUTMAN   MASKA   NEILL & COMPANY <small>uncommon minds for uncommon missions™</small>								
Program Management Report		Report Parameter Inclusions:								
PMR Version: 1 - Direct Response Performance		Revenue Amounts: \$5.00 - \$999.99		Max Same-day Gifts: 3		Max Lifetime Revenue:		Max Lifetime-Gifts: 20		
Reporting Period: January 1 - December 31										
House Performance	2010	2011	2012	2013	2014	2015	2016	2017	Trendline	
No. of Donors	3,681	3,465	3,478	3,603	3,430	2,622	4,439	4,710		
No. of Gifts	4,657	4,526	4,357	4,654	4,325	3,430	5,882	6,210		
Gifts per Donor	1.01	1.05	1.00	1.03	1.01	1.05	1.06	1.05		
Total Amount	\$215,064	\$214,648	\$212,949	\$224,250	\$201,040	\$175,844	\$312,540	\$349,269		
Avg. Gift Amt.	\$36.95	\$37.94	\$39.10	\$38.54	\$37.19	\$41.01	\$42.51	\$44.99		
Avg. per Donor	\$46.74	\$49.56	\$48.98	\$49.79	\$46.90	\$53.64	\$56.32	\$59.33		
New Donors	1,155	898	1,157	1,130	1,130	695	1,882	1,986		
No. of Gifts	1,299	1,051	1,303	1,322	1,280	803	2,182	2,269		
Gifts per Donor	0.90	0.94	0.90	0.94	0.91	0.92	0.93	0.91		
Total Amount	\$52,728	\$47,091	\$61,542	\$58,885	\$57,277	\$39,354	\$117,476	\$132,646		
Avg. Gift Amt.	\$32.47	\$35.84	\$37.78	\$35.62	\$35.80	\$39.20	\$43.06	\$46.77		
Avg. per Donor	\$36.52	\$41.93	\$42.56	\$41.67	\$40.54	\$45.29	\$49.93	\$53.44		
New Donor Renewal Cand.	1,450	1,155	898	1,157	1,130	1,130	695	1,882		
New Donor Renewals	479	411	322	369	341	264	246	610		
Renewal Rate (FY Retention)	26.43%	28.48%	28.64%	25.50%	24.12%	18.68%	28.35%	25.94%		
No. of Gifts	667	581	446	529	452	361	374	878		
Gifts per Donor	1.11	1.13	1.11	1.15	1.06	1.09	1.22	1.15		
Total Amount	\$24,957	\$22,356	\$20,792	\$19,272	\$18,309	\$16,234	\$16,865	\$46,204		
Avg. Gift Amt.	\$29.92	\$30.79	\$37.26	\$29.16	\$32.41	\$36.00	\$36.04	\$42.08		
Avg. per Donor	\$41.66	\$43.49	\$51.72	\$41.81	\$42.98	\$49.20	\$54.76	\$60.56		
Multi-Year Donor Renewal Cand.	2,354	2,526	2,566	2,322	2,473	2,299	1,927	2,557		
Multi-Year Donor Renewals	1,480	1,589	1,492	1,415	1,448	1,176	1,257	1,526		
Renewal Rate	50.31%	50.33%	46.51%	48.77%	46.85%	40.92%	52.17%	47.76%		
No. of Gifts	2,018	2,198	2,015	1,957	1,986	1,697	1,950	2,352		
Gifts per Donor	1.09	1.11	1.08	1.11	1.10	1.15	1.24	1.23		
Total Amount	\$103,749	\$111,738	\$100,555	\$103,112	\$95,623	\$83,655	\$100,719	\$127,821		
Avg. Gift Amt.	\$41.12	\$40.66	\$39.92	\$42.16	\$38.51	\$39.44	\$41.31	\$43.48		
Avg. per Donor	\$56.08	\$56.26	\$53.92	\$58.29	\$52.83	\$56.91	\$64.11	\$66.99		
Overall Renewal Rate	41.20%	43.47%	41.87%	41.03%	39.72%	33.59%	45.86%	38.51%		

**Program Management Report:** This is a program snapshot that examines the overall health of the donor file by looking at overall performance and retention of new and existing donors. The number of gifts per donor, average gift amounts, and average gifts per donor are also included to provide a deeper level of analysis on the donor file.

# Overall File Analysis

**Sample Client**  
**Upgrade/Downgrade**  
**Reporting Period: Jan. 1 - Dec. 31**



2016 - 2015	Donors	2015 Gifts	2015 Revenue	2016 Gifts	2016 Revenue	Change in Revenue	2015 Rev/Donor	2016 Rev/Donor	2015 Gifts/Donor	2016 Gifts/Donor	2015 Avg Gift	2016 Avg Gift
Upgrade	1,164	1,770	\$54,612	2,687	\$93,785	\$39,173	\$46.92	\$80.57	1.52	2.31	\$30.85	\$34.90
Same	1,867	2,961	\$80,601	2,969	\$80,601	\$0	\$43.17	\$43.17	1.59	1.59	\$27.22	\$27.15
Downgrade	1,441	3,563	\$122,267	2,164	\$66,822	-\$55,445	\$84.85	\$46.37	2.47	1.50	\$34.32	\$30.88
Recapture	2,058	0	\$0	2,429	\$76,775	\$76,775	\$0.00	\$37.31	0.00	1.18	\$0.00	\$31.61
New	1,489	0	\$0	1,725	\$54,897	\$54,897	\$0.00	\$36.87	0.00	1.16	\$0.00	\$31.82
Lapsed	3,785	4,457	\$136,748	0	\$0	-\$136,748	\$36.13	\$0.00	1.18	0.00	\$30.68	\$0.00
<b>TOTAL</b>	<b>11,804</b>	<b>12,751</b>	<b>\$394,228</b>	<b>11,974</b>	<b>\$372,881</b>	<b>-\$21,348</b>	<b>\$47.74</b>	<b>\$46.50</b>	<b>1.54</b>	<b>1.49</b>	<b>\$30.92</b>	<b>\$31.14</b>

2015 Total 8,257 \$394,228 \$136,748  
 2016 Total 8,019 \$372,881 % Renewed in 2016 54.16%

**Upgrade/Downgrade Report:** This reviews the effectiveness of active and passive upgrade efforts by looking at how many donors are giving greater or lesser gift amounts year after year. This can be run either as a comprehensive analysis of one year's change or as a series of all contribution years over time.

# Overall File Analysis

**Sample Client**  
**Conversion Performance Report**  
**Reporting Period: Oct 1 - Sep 30**  
*same-day transactions combined\**

Gifts under \$5  
 Gifts of \$5,000 or more

\* transactions with the same ID number  
 and the same date were combined and  
 counted as one transaction

	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
New Donors	946	910	1,414	759	953	2,451	3,288	4,919	158
First Gift Revenue	\$88,998	\$94,541	\$107,813	\$109,401	\$127,743	\$244,292	\$243,329	\$373,222	\$1,194
Average First Gift	\$94.05	\$103.93	\$76.24	\$144.13	\$133.99	\$99.67	\$74.01	\$75.88	\$7.56
Lifetime Revenue from All Donors	\$190,996	\$282,475	\$226,188	\$284,534	\$350,443	\$547,877	\$424,810	\$569,658	\$1,831
Lifetime Value per New Donor	\$202	\$311	\$160	\$375	\$368	\$224	\$129	\$116	\$12
Converted Donors	192	153	178	110	392	693	837	1,515	89
Lifetime Revenue from Converted Donors	\$117,781	\$212,752	\$139,837	\$205,753	\$261,255	\$368,893	\$240,593	\$294,187	\$1,106
<b>Conversion Period: 0-3 months</b>									
New Donors giving a second gift (Converted Donors)	97	65	84	27	253	269	299	477	72
Conversion Rate	10.3%	7.1%	5.9%	3.5%	26.6%	11.0%	9.1%	9.7%	45.8%
<b>within conversion period</b>									
First gift revenue from Converted Donors	\$5,040	\$7,418	\$8,097	\$13,372	\$18,034	\$13,334	\$9,957	\$16,894	\$346
Additional gifts from Converted Donors	145	101	98	37	422	469	494	811	91
Average # of additional gifts per Converted Donor	1.48	1.56	1.18	1.37	1.67	1.74	1.65	1.70	1.26
Revenue from additional gifts	\$6,907	\$8,019	\$10,924	\$10,881	\$25,944	\$12,404	\$10,758	\$22,087	\$418
Average amount of additional gifts	\$47.79	\$79.76	\$110.97	\$297.55	\$61.47	\$26.44	\$21.79	\$27.23	\$4.57
Average additional amount per Converted Donor	\$70.93	\$124.23	\$130.57	\$407.66	\$102.37	\$46.13	\$36.01	\$46.27	\$5.78
<b>lifetime</b>									
Additional gifts from Converted Donors	1,039	677	252	298	5,866	5,435	3,385	3,823	110
Average # of additional gifts per Converted Donor	10.67	10.48	3.02	11.16	23.15	20.21	11.33	8.01	1.53
Revenue from additional gifts	\$47,532	\$128,313	\$25,440	\$95,040	\$123,157	\$109,218	\$58,424	\$74,525	\$476
Average amount of additional gifts	\$45.76	\$189.67	\$100.79	\$319.18	\$20.99	\$17.26	\$19.49	\$4.32	\$4.32
Average additional amount per Converted Donor	\$488.10	\$1,987.82	\$304.09	\$3,560.84	\$485.97	\$406.16	\$195.53	\$156.12	\$6.59
<b>Conversion Period: 4-6 months</b>									
New Donors giving a second gift (Converted Donors)	19	12	23	18	32	93	187	185	15
Conversion Rate	2.0%	1.3%	1.7%	2.3%	3.4%	3.8%	5.7%	3.8%	9.4%
<b>within conversion period</b>									
First gift revenue from Converted Donors	\$1,126	\$1,303	\$5,610	\$6,745	\$3,504	\$12,229	\$12,548	\$13,378	\$118
Additional gifts from Converted Donors	19	13	26	18	37	104	216	218	16
Average # of additional gifts per Converted Donor	1.00	1.10	1.10	1.00	1.14	1.11	1.16	1.18	1.04
Revenue from additional gifts	\$938	\$416	\$7,313	\$4,378	\$3,673	\$13,405	\$14,643	\$14,780	\$153
Average amount of additional gifts	\$49.68	\$31.64	\$285.84	\$246.76	\$100.43	\$129.27	\$67.73	\$67.71	\$9.83
Average additional amount per Converted Donor	\$49.68	\$34.70	\$313.05	\$246.76	\$114.07	\$143.88	\$78.23	\$79.84	\$10.26
<b>lifetime</b>									
Additional gifts from Converted Donors	78	56	72	66	295	415	542	398	16
Average # of additional gifts per Converted Donor	4.15	4.67	3.08	3.70	9.15	4.45	2.89	2.15	1.04
Revenue from additional gifts	\$5,156	\$16,508	\$44,566	\$29,936	\$23,402	\$51,625	\$35,711	\$23,725	\$153
Average amount of additional gifts	\$65.80	\$294.78	\$618.98	\$456.24	\$79.42	\$124.44	\$65.91	\$59.54	\$9.83
Average additional amount per Converted Donor	\$273.21	\$1,375.63	\$1,907.90	\$1,687.35	\$726.87	\$554.12	\$190.77	\$128.16	\$10.26
<b>Conversion Period: 7-9 months</b>									
New Donors giving a second gift (Converted Donors)	14	17	30	27	41	80	148	178	1
Conversion Rate	1.5%	1.8%	2.1%	3.5%	4.3%	3.3%	4.5%	3.6%	0.9%
<b>within conversion period</b>									
First gift revenue from Converted Donors	\$2,524	\$3,375	\$3,225	\$5,105	\$2,030	\$8,585	\$10,804	\$15,757	\$5
Additional gifts from Converted Donors	14	17	32	27	45	95	157	201	1
Average # of additional gifts per Converted Donor	1.00	1.00	1.07	1.00	1.11	1.18	1.06	1.13	1.00
Revenue from additional gifts	\$2,426	\$3,194	\$3,050	\$4,833	\$2,973	\$13,222	\$10,644	\$15,192	\$8
Average amount of additional gifts	\$169.49	\$192.36	\$94.72	\$181.09	\$65.71	\$138.78	\$67.78	\$75.71	\$5.34
Average additional amount per Converted Donor	\$169.49	\$192.36	\$101.66	\$181.09	\$72.66	\$164.28	\$72.08	\$85.42	\$5.34
<b>lifetime</b>									
Additional gifts from Converted Donors	91	122	111	71	234	436	416	296	1
Average # of additional gifts per Converted Donor	6.36	7.32	3.70	2.66	5.71	5.42	2.82	1.66	1.00
Revenue from additional gifts	\$7,856	\$10,981	\$26,174	\$19,443	\$11,216	\$45,809	\$22,469	\$23,332	\$8
Average amount of additional gifts	\$86.27	\$90.35	\$235.70	\$274.08	\$47.97	\$104.97	\$54.02	\$78.90	\$5.34
Average additional amount per Converted Donor	\$548.71	\$661.30	\$872.48	\$728.46	\$274.12	\$569.17	\$152.16	\$131.19	\$5.34
<b>Conversion Period: 10-12 months</b>									
New Donors giving a second gift (Converted Donors)	61	60	41	39	66	250	204	674	
Conversion Rate	6.5%	6.6%	2.9%	5.1%	6.9%	10.2%	6.2%	13.7%	
<b>within conversion period</b>									
First gift revenue from Converted Donors	\$7,094	\$12,723	\$4,531	\$5,398	\$14,987	\$31,161	\$25,803	\$51,720	
Additional gifts from Converted Donors	61	62	41	39	68	253	215	741	
Average # of additional gifts per Converted Donor	1.00	1.04	1.00	1.00	1.03	1.01	1.06	1.10	
Revenue from additional gifts	\$6,849	\$10,193	\$4,672	\$10,074	\$19,884	\$33,540	\$38,158	\$65,339	
Average amount of additional gifts	\$111.64	\$163.31	\$114.18	\$260.01	\$293.51	\$132.34	\$177.33	\$88.21	
Average additional amount per Converted Donor	\$111.64	\$169.10	\$114.18	\$260.01	\$303.04	\$133.98	\$187.25	\$96.87	
<b>lifetime</b>									
Additional gifts from Converted Donors	241	172	123	108	215	649	397	1,078	
Average # of additional gifts per Converted Donor	3.93	2.85	3.00	2.78	3.28	2.59	1.95	1.60	
Revenue from additional gifts	\$41,454	\$32,131	\$22,194	\$30,714	\$64,925	\$96,931	\$64,877	\$74,855	
Average amount of additional gifts	\$171.98	\$187.24	\$181.05	\$284.65	\$301.73	\$149.36	\$163.24	\$69.42	
Average additional amount per Converted Donor	\$675.71	\$533.03	\$542.42	\$792.73	\$989.47	\$387.21	\$318.36	\$110.98	

**Conversion Performance Report:** This report looks to pin down the precise time when newly acquired donors convert into being multi-givers. Breaking each class into conversion period subsets makes it easy to quickly identify how conversion time affects lifetime revenue generation.

# Overall File Analysis

2017.08.10 - Sample Client PMR 1 - Lo\$5.00 and 5000.00 - (Calendar).xlsx

**Sample Client**  
**New Donor Giving Report**  
**Reporting Period: Jan. 1 - Dec. 31**



		2008	2009	2010	2011	2012	2013	2014	2015	2016
2008	Donors	2,047	580	522	419	415	329	334	336	293
	No. of gifts	2,368	898	801	638	615	507	499	522	458
	Cumulative gifts	2,368	3,266	4,067	4,705	5,320	5,827	6,326	6,848	7,306
	Gifts per donor	1.16	1.55	1.53	1.52	1.48	1.54	1.49	1.55	1.56
	Revenue	\$79,754.73	\$25,939.00	\$22,171.00	\$17,042.50	\$16,721.00	\$14,042.00	\$14,777.00	\$15,573.00	\$12,849.00
	Cumulative revenue	\$79,754.73	\$105,693.73	\$127,864.73	\$144,907.23	\$161,628.23	\$175,670.23	\$190,447.23	\$206,020.23	\$218,869.23
	Avg. gift amt	\$33.68	\$28.89	\$27.68	\$26.71	\$27.19	\$27.70	\$29.61	\$29.83	\$28.05
	Revenue per donor	\$38.96	\$44.72	\$42.47	\$40.67	\$40.29	\$42.68	\$44.24	\$46.35	\$43.85
	Cumulative retention		28.33%	25.50%	20.47%	20.27%	16.07%	16.32%	16.41%	14.31%
2009	Donors		1,970	555	472	399	410	355	333	305
	No. of gifts		2,323	811	669	617	602	559	504	461
	Cumulative gifts		2,323	3,134	3,803	4,420	5,022	5,581	6,085	6,546
	Gifts per donor		1.18	1.46	1.42	1.55	1.47	1.57	1.51	1.51
	Revenue		\$75,471.56	\$23,297.80	\$20,138.00	\$17,804.00	\$18,961.00	\$17,999.00	\$16,142.50	\$14,376.00
	Cumulative revenue		\$75,471.56	\$98,769.36	\$118,907.36	\$136,711.36	\$155,672.36	\$173,671.36	\$189,813.86	\$204,189.86
	Avg. gift amt		\$32.49	\$28.73	\$30.10	\$28.86	\$31.50	\$32.20	\$32.03	\$31.18
	Revenue per donor		\$38.31	\$41.98	\$42.67	\$44.62	\$46.25	\$50.70	\$48.48	\$47.13
	Cumulative retention			28.17%	23.96%	20.25%	20.81%	18.02%	16.90%	15.48%
2010	Donors			1,837	520	424	398	370	335	293
	No. of gifts			2,177	748	677	610	568	508	426
	Cumulative gifts			2,177	2,925	3,602	4,212	4,780	5,288	5,714
	Gifts per donor			1.19	1.44	1.60	1.53	1.54	1.52	1.45
	Revenue			\$65,413.13	\$21,607.41	\$19,791.00	\$17,443.00	\$16,410.50	\$15,480.00	\$12,897.76
	Cumulative revenue			\$65,413.13	\$87,020.54	\$106,811.54	\$124,254.54	\$140,665.04	\$156,145.04	\$169,042.80
	Avg. gift amt			\$30.05	\$28.89	\$29.23	\$28.60	\$28.89	\$30.47	\$30.28
	Revenue per donor			\$35.61	\$41.55	\$46.68	\$43.83	\$44.35	\$46.21	\$44.02
	Cumulative retention				28.31%	23.08%	21.67%	20.14%	18.24%	15.95%
2011	Donors				1,608	443	385	324	333	261
	No. of gifts				1,876	655	538	473	484	379
	Cumulative gifts				1,876	2,531	3,069	3,542	4,026	4,405
	Gifts per donor				1.17	1.48	1.40	1.46	1.45	1.45
	Revenue				\$61,578.71	\$19,177.00	\$18,205.38	\$15,523.00	\$15,051.00	\$12,953.00
	Cumulative revenue				\$61,578.71	\$80,755.71	\$98,961.09	\$114,484.09	\$129,535.09	\$142,488.09
	Avg. gift amt				\$32.82	\$29.28	\$33.84	\$32.82	\$31.10	\$34.18
	Revenue per donor				\$38.30	\$43.29	\$47.29	\$47.91	\$45.20	\$49.63
	Cumulative retention					27.55%	23.94%	20.15%	20.71%	16.23%
2012	Donors					1,834	471	401	333	336
	No. of gifts					2,164	647	592	459	443
	Cumulative gifts					2,164	2,811	3,403	3,862	4,305
	Gifts per donor					1.18	1.37	1.48	1.38	1.32
	Revenue					\$67,439.88	\$20,016.00	\$18,982.00	\$15,463.14	\$14,352.15
	Cumulative revenue					\$67,439.88	\$87,455.88	\$106,437.88	\$121,901.02	\$136,253.17
	Avg. gift amt					\$31.16	\$30.94	\$32.06	\$33.69	\$32.40
	Revenue per donor					\$36.77	\$42.50	\$47.34	\$46.44	\$42.71
	Cumulative retention						25.68%	21.86%	18.16%	18.32%

*Exclusions:*  
 Donors with >249 lifetime or >4 same day gifts  
 Certain Appeal Codes (See Snapshot)  
 Gifts <\$5.00 or >\$1,0000.00

\* same day transactions were treated as duplicates, with lesser of transactions remaining.

**New Donor Giving Report:** This looks at each acquisition class from their first interaction over time and tracks donor retention, revenue retention, and how lifetime value increases.

## Sample Client Frequency of Giving

MRC in 2016	2 years	3 years	4 years	5 years	6 years	7 years	8 years	9 years
Donors who have 1 or more gifts per year for X consecutive years	1,165	686	495	265	115	80	84	209
Donors who have 1 or more gifts per year for X-1 of X years		236	184	118	63	42	44	92
Donors who have 1 or more gifts per year for X-2 of X years			72	85	50	34	24	36

  

MRC in 2015	2 years	3 years	4 years	5 years	6 years	7 years	8 years
Donors who have 1 or more gifts per year for X consecutive years	942	493	246	102	50	46	107
Donors who have 1 or more gifts per year for X-1 of X years		236	151	122	45	53	88
Donors who have 1 or more gifts per year for X-2 of X years			109	96	63	40	68

  

MRC in 2014	2 years	3 years	4 years	5 years	6 years	7 years
Donors who have 1 or more gifts per year for X consecutive years	427	150	72	25	18	33
Donors who have 1 or more gifts per year for X-1 of X years		145	72	29	22	29
Donors who have 1 or more gifts per year for X-2 of X years			59	25	16	30

RED - Tier 1	385
ORANGE - Tier 2	401
YELLOW - Tier 3	432
GREEN - Tier 4	626
BLUE - Tier 5	1,211
PURPLE - Tier 6	1,942

### Exclusions:

Donors with any of the following Solicitation Codes: Do Not Mail, Do Not Solicit, One Solicitation Per Year, bad address

**Frequency of Giving Report:** Generates a loyalty array counting the number of donors fitting within a frequency tolerance range. This means the number of donors who gave 10 gifts in the last 10 years, or 9 gifts within the last 10 years, and so on. Especially useful to guide planned giving strategy.