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Measuring the Health of Your Development Operation

mission
ADVANCEMENT

Development Health Worksheet

Measuring the health of your organization’s fundraising starts with analyzing your donor retention. An organization can drastically improve its financial health by simply retaining and growing its current donors. For the exercise below, begin by gathering all the individual and corporate giving for the past fiscal year. In order to show a donor’s full impact on the organization, it is essential that all gifts are consolidated regardless of the activity to which they may be tied. You will want to include gifts made at special events, including event sponsorships, as well as gifts given during annual funding drives, end-of-year appeals, and giving days.

For this exercise we are excluding earned revenue, gifts to capital campaigns and gifts-in-kind, unless they offset significant operational expenses.

Using the structure below, begin with the Top 10 individual and corporate donors to your organization in the last fiscal year. Then repeat this same analysis for the next 20 and third 20 donors to give you a view of your top 50 donors.

A. Donor Name	B. Total Giving Last Year	C. How much of last year’s gift will you retain this year?	D. What is a reasonable amount of growth for that donor?	E. Projected Total Giving This Year (Column C + D)
1.	\$	\$	\$	\$
2.	\$	\$	\$	\$
3.	\$	\$	\$	\$
4.	\$	\$	\$	\$
5.	\$	\$	\$	\$
6.	\$	\$	\$	\$
7.	\$	\$	\$	\$
8.	\$	\$	\$	\$
9.	\$	\$	\$	\$
10.	\$	\$	\$	\$
TOTALS:	\$	\$	\$	\$

Development Health Worksheet

ANALYSIS OF TOP 50 SOURCES:

Top 10 sources (individual/corporate):

Gifts ranging from \$_____ to \$_____

Total percentage of fundraising budget _____%

Percentage of Top 10 donor gifts retained _____% (Total of Column C divided by Total of Column B)

Percentage of Top 10 donor gifts increased _____% (Total of Column D divided by Total of Column B)

Next 20 sources (individual/corporate):

Gifts ranging from \$_____ to \$_____

Total percentage of fundraising budget _____%

Percentage of Next 20 donor gifts retained _____%

Percentage of Next 20 donor gifts increased _____%

Third 20 sources (individual/corporate):

Gifts ranging from \$_____ to \$_____

Total percentage of fundraising budget _____%

Percentage of Third 20 donor gifts retained _____%

Percentage of Third 20 donor gifts increased _____%

BENCHMARKS: *

- Top 10 Donors: 25-40% of fundraising budget
- Top 50 Donors: 50-75% of fundraising budget
- Top 100 Donors: 70-90% of fundraising budget
- Retention: 80-100%
- Growth: 3-5%
- Overall Revenue to Cost ratio of Development Operation of at least 4:1
- Revenue to Cost ratio for Events of 3:1 (with rare exceptions)

* Benchmarks are an average statistic and may not be applicable for all nonprofits