

Forecasts and the Path to Strategic Goal Setting

March 2015

Creating an Acquisition Forecast: Supporting Steps

Creating an Acquisition Forecast

of Never Donors

X

Avg PDI of Never Donors

=

Forecasted # of Acquired Donors

197,846

X

1.95%

=


3,858

Only Person Relationship types get predictive scores


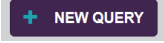

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Find the number of Never Donors

- 1) Within the  layer of the Reeher Platform, click  in the upper right hand corner.
- 2) Add filters from the  section on the left hand side of the screen. Under **Donor Attributes**, select the **Donor Status** filter and highlight **Never Donor** in the selection box.

3) Click **Get Results**.

The screenshot shows the 'Add a Query' interface. On the left, the 'Filters' sidebar is visible, with 'Donor Status' selected under 'Donor Attributes'. A dropdown menu for 'Donor Status' is open, showing options: Retained, Renewed, LYBUNT, SYBUNT, Past Donor, and Never Donor (highlighted). A 'GET RESULTS' button is highlighted at the bottom center. The 'SAVE' button is in the top right corner.


4) After you select **Get Results**, your results will display. The total number of records meeting the **Never Donor** criteria is displayed in the top left-hand corner. Use this number in your calculation.




197,705 records found.

export columns view: [list icon] [table icon] [refresh icon]

Entity ID	Relationship Status	First Name	Last Name	Home Zip Code	Home State	Primary Relationship Type	Net Worth	Last Transaction Amount
100011	Active	Charles	Schaffner	14692	NY	Alumni	\$50,000 - \$99,999	N/A
100014	Active	Robert	Dunifon	27111	NC	Alumni	\$50,000 - \$99,999	N/A
100019	Active	Louis	LeFavour	78254	TX	Alumni	\$500,000 - \$999,999	N/A
100022	Active	Gladys	Gill	56146	MN	Alumni	N/A	N/A
100028	Active	Charles	Kennedy	80920	CO	Alumni	\$500,000 - \$999,999	N/A
100037	Active	Miriam	Worley	60691	IL	Alumni	Greater than \$1,999,999	\$50
100042	Active	Timothy	Anthon	56057	MN	Alumni	\$50,000 - \$99,999	N/A
100046	Active	Ruth	Stiens	85739	AZ	Alumni	\$50,000 - \$99,999	N/A
100048	Active	Garry	Bosse	40036	KY	Alumni	\$500,000 - \$999,999	N/A
100049	Active	Milo	Chase	55768	MN	Alumni	\$250,000 - \$499,999	N/A
100050	Active	Jane	Brady	55306	MN	Alumni	\$500,000 - \$999,999	\$20

Find the Average PDI Score for Never Donors

1) Using the result set found when you determined the number of Never Donors, add columns to include the PDI score on all records. Do this by clicking on  columns in the upper right-hand corner.

197,705 records found. export columns view:   

Entity ID	Relationship Status	First Name	Last Name	Home Zip Code	Home State	Primary Relationship Type	Net Worth	Last Transaction Amount
100011	Active	Charles	Schaffner	14692	NY	Alumni	\$50,000 - \$99,999	N/A
100014	Active	Robert	Dunifon	27111	NC	Alumni	\$50,000 - \$99,999	N/A
100019	Active	Louis	LeFavour	78254	TX	Alumni	\$500,000 - \$999,999	N/A
100022	Active	Gladys	Gill	56146	MN	Alumni	N/A	N/A
100028	Active	Charles	Kennedy	80920	CO	Alumni	\$500,000 - \$999,999	N/A
100037	Active	Miriam	Worley	60691	IL	Alumni	Greater than \$1,999,999	\$50
100042	Active	Timothy	Anthon	56057	MN	Alumni	\$50,000 - \$99,999	N/A
100046	Active	Ruth	Stiens	85739	AZ	Alumni	\$50,000 - \$99,999	N/A
100048	Active	Garry	Bosse	40036	KY	Alumni	\$500,000 - \$999,999	N/A
100049	Active	Milo	Chase	55768	MN	Alumni	\$250,000 - \$499,999	N/A
100050	Active	Jane	Brady	55306	MN	Alumni	\$500,000 - \$999,999	\$20

2) Under **Reeher Predictive Scores**, choose **AF PDI**. You'll notice that the filter then moves under **Selected Columns**. Click **Submit**.

ADD COLUMNS

ALL COLUMN TYPES:
Checked items will appear in the list to right

Search

- ▶ Entity
- ▶ Contact Information
- ▶ School of Graduation
- ▶ Prospect Management
- ▶ Donor Attributes
- ▼ **Reeher Predictive Scores**
 - AF EVI
 - AF Expected Value
 - AF PDI**
 - MG EVI
 - MG Expected Value
 - Previous AF EVI
 - Previous AF PDI
 - Previous MG EVI
- ▶ Consumer Variables
- ▶ Western University Specific
- ▶ Social Media

SELECTED COLUMNS:
Drag items in this list up or down to change display order


- Entity ID
- Relationship Status
- First Name
- Last Name
- AF PDI

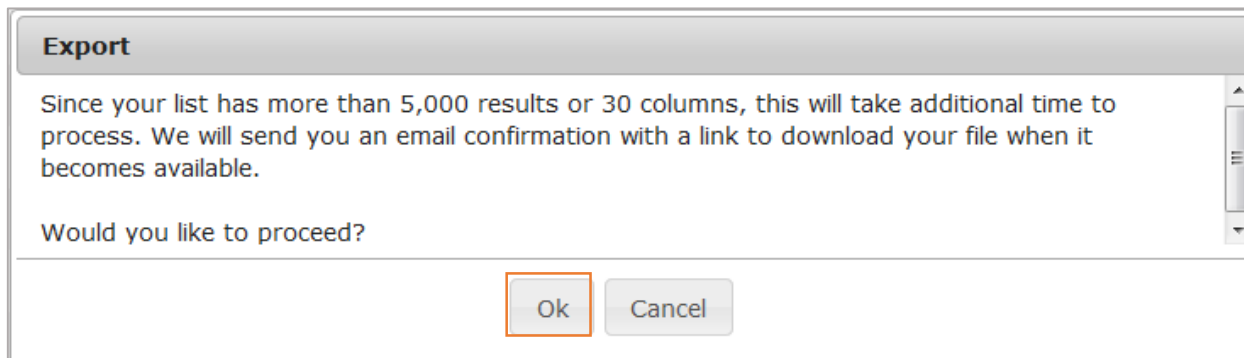
Submit Cancel

3) Your result set will change to reflect your selections.

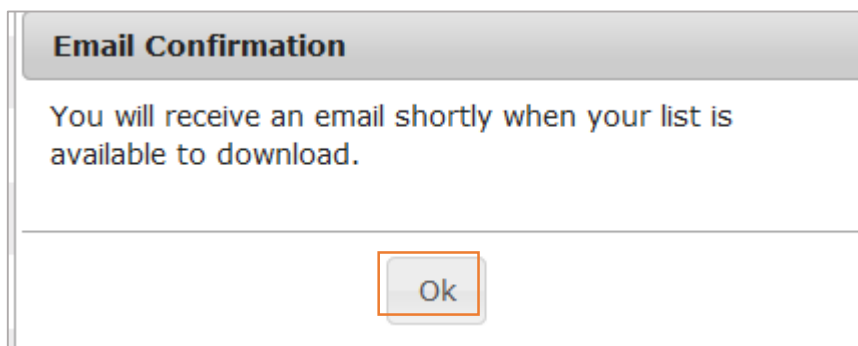
197,705 records found. export columns view: [list icon] [table icon] [refresh icon]

Entity ID	Relationship Status	First Name	Last Name	AF PDI
100011	Active	Charles	Schaffner	2
100014	Active	Robert	Dunifon	1
100019	Active	Louis	LeFavour	2
100022	Active	Gladys	Gill	1
100028	Active	Charles	Kennedy	4
100037	Active	Miriam	Worley	6
100042	Active	Timothy	Anthon	2
100046	Active	Ruth	Stiens	1
100048	Active	Garry	Bosse	0
100049	Active	Milo	Chase	5
100050	Active	Jane	Brady	3
100052	Active	Paul	Botros	2
100056	Active	Shirley	Williford	3
100057	Active	David	Search	29
100059	Active	Robert	Reisig	2

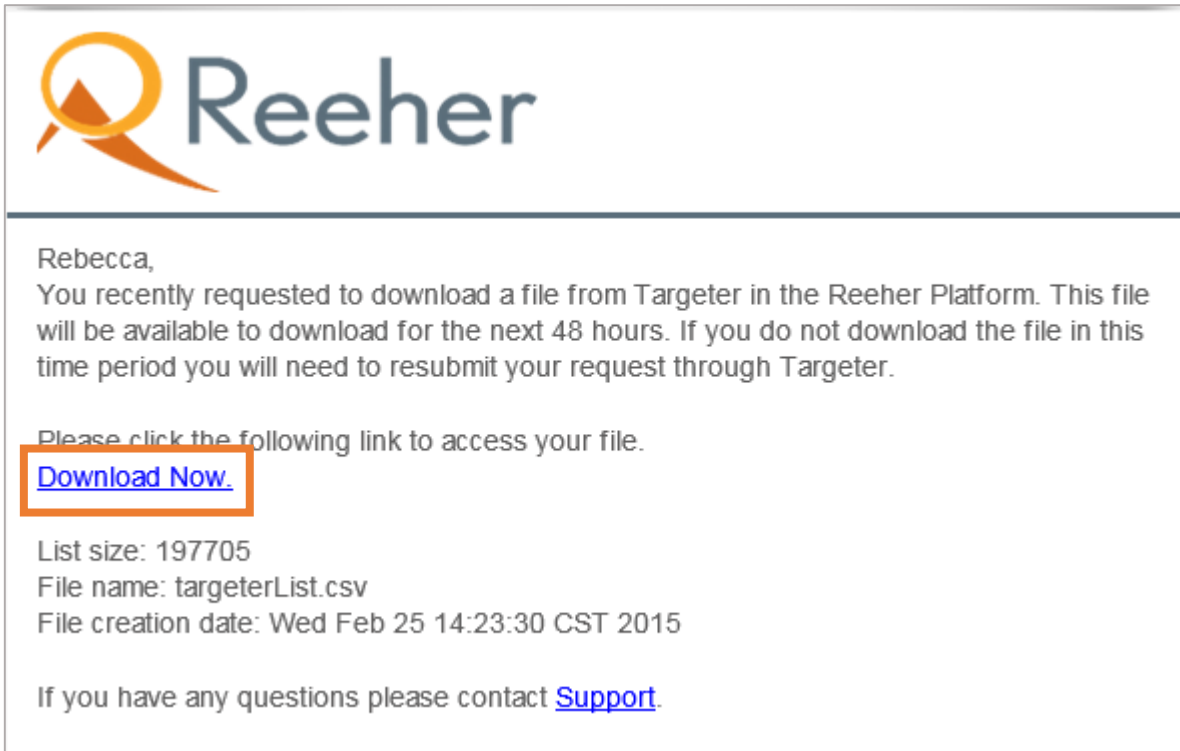
4) Export the result set by clicking on  export . If you have more than 5,000 records in your result set, you will get a message:



5) Click **OK**. You will receive an email confirmation message. Click OK:



6) Check your email. You should get a message that reads the following:



7) Click the **Download Now** link from within the email. The same columns that you displayed within the Platform will be at the top of your downloaded Excel document.

8) Using Excel formulas, average the AF PDI column. To do so, scroll to the bottom of that column and enter into the cell the appropriate averaging formula. Use this average in the original equation to calculate the number of forecasted donors in an acquisition target segment.

$$\begin{array}{rclcl} \text{\# of Never Donors} & \times & \text{Average PDI for that segment} & = & \text{Forecasted \# of Acquired Donors} \\ 197,705 & \times & 1.94\% & = & 3,835 \end{array}$$

Creating a Key Donor Segment Forecast: Supporting Steps (Example: Graduates of the 1980s)

Forecasting Donors for a Key Segment – Graduates of the 1980s

Forecast participation rate, number of donors and dollars



Find the number of Active Constituents from the Chosen Segment


- 1) Within the **TARGETER** layer of the Reeher Platform, click **+ NEW QUERY** in the upper right hand corner.
- 2) Add filters from the **Filters** section on the left hand side of the screen. Under **Entity**, check **Relationship Status** filter. Under **School of Graduation** check **Year of Graduation**.
- 3) Within the filters, highlight **Active** under Relationship Status and select **Is Between** from the dropdown box under **Year of Graduation**. Fill in the years **1980** and **1989**. Click **Get Results**.






The screenshot displays the 'Add a Query' interface. On the left, the 'Filters' sidebar is visible, with a search bar and a list of filter categories. Under the 'Entity' category, 'Relationship Status' is selected. Under the 'School of Graduation' category, 'Year of Graduation' is selected. The main configuration area on the right shows the 'Relationship Status' filter set to 'Active' and the 'Year of Graduation' filter set to 'Is Between' with the values '1980' and '1989'. A 'GET RESULTS' button is highlighted at the bottom of the configuration area.

4) After you select **Get Results**, your results will display. The total number of records meeting the **Donors of the 1980s** criteria is displayed in the top left-hand corner. Use this number in your calculation.

Entity ID	Relationship Status	First Name	Last Name
100133	Active	Nancy	Lane
100394	Active	William	Harris
100702	Active	Miriam	Maul
101128	Active	Thomas	Wheeler
101235	Active	Nancy	McGaughey
101263	Active	Dennis	Cowgill
101468	Active	Mary	Lichtenberg
101640	Active	Alfred	Wang
102048	Active	John	Tepe-Wherley
102305	Active	Steven	Brewer
102310	Active	Teddy	Reddy
102319	Active	Timothy	Santanelo
102330	Active	Roland	Richardson
102352	Active	Barbara	Hayes
102361	Active	Claude	Dortch
102385	Active	Marti	Schultz

Find the Average PDI Score for Graduates of the 1980s

1) Using the result set found when you determined the number of Graduates of the 1980s, add columns to include the PDI score on all records. Do this by clicking on  in the upper right-hand corner.

48,735 records found.   view:   

Entity ID	Relationship Status	First Name	Last Name
100133	Active	Nancy	Lane
100394	Active	William	Harris
100702	Active	Miriam	Maul
101128	Active	Thomas	Wheeler
101235	Active	Nancy	McGaughey
101263	Active	Dennis	Cowgill
101468	Active	Mary	Lichtenberg
101640	Active	Alfred	Wang
102048	Active	John	Tepe-Wherley
102305	Active	Steven	Brewer
102310	Active	Teddy	Reddy
102319	Active	Timothy	Santanelo
102330	Active	Roland	Richardson
102352	Active	Barbara	Hayes
102361	Active	Claude	Dortch
102385	Active	Marti	Schultz

2) Under **Reeher Predictive Scores**, choose **AF PDI**. You'll notice that the filter then moves under **Selected Columns**. Click **Submit**.

The screenshot shows a dialog box titled "ADD COLUMNS" with two main sections: "ALL COLUMN TYPES:" and "SELECTED COLUMNS:".

ALL COLUMN TYPES: This section contains a search box and a list of categories. The "Reeher Predictive Scores" category is expanded and highlighted with an orange box. Within this category, the "AF PDI" option is checked and also highlighted with an orange box. An orange arrow points from the "AF PDI" checkbox to the "SELECTED COLUMNS:" section.

SELECTED COLUMNS: This section shows a list of columns that have been added to the report. The columns listed are: Entity ID, Relationship Status, First Name, Last Name, and AF PDI. Each column has a small 'x' icon to its right, indicating it can be removed.


At the bottom of the dialog box, there are two buttons: "Submit" and "Cancel". The "Submit" button is highlighted with an orange box.

3) Your result set will change to reflect your selections.

48,735 records found.

export columns view: [grid icon] [refresh icon]

Entity ID	Relationship Status	First Name	Last Name	AF PDI
100133	Active	Nancy	Lane	84
100394	Active	William	Harris	2
100702	Active	Miriam	Maul	87
101128	Active	Thomas	Wheeler	7
101235	Active	Nancy	McGaughey	60
101263	Active	Dennis	Cowgill	2
101468	Active	Mary	Lichtenberg	8
101640	Active	Alfred	Wang	18
102048	Active	John	Tepe-Wherley	2
102305	Active	Steven	Brewer	89
102310	Active	Teddy	Reddy	85
102319	Active	Timothy	Santanelo	2
102330	Active	Roland	Richardson	3
102352	Active	Barbara	Hayes	1
102361	Active	Claude	Dortch	71
102385	Active	Marti	Schultz	29



Follow steps 4 through 8 from procedure above.

Segment Constituents	X	Avg. PDI of Segment Constituents	=	Forecasted Segment donors
48,735	X	10.53%	=	5,131

Forecasting Dollars for a Key Segment

Forecasting Dollars for a Key Segment – Graduates of the 1980s

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Find the EV from a Segment

1) Using the same result set you used to find the number of **Graduates of the 1980s**, look to add columns to the field. Click on [columns](#) in the upper right-hand corner.

48,735 records found. export [columns](#) view: ☰ 📄 🌐

Entity ID	Relationship Status	First Name	Last Name
100133	Active	Nancy	Lane
100394	Active	William	Harris
100702	Active	Miriam	Maul
101128	Active	Thomas	Wheeler
101235	Active	Nancy	McGaughey
101263	Active	Dennis	Cowgill
101468	Active	Mary	Lichtenberg
101640	Active	Alfred	Wang
102048	Active	John	Tepe-Wherley
102305	Active	Steven	Brewer
102310	Active	Teddy	Reddy
102319	Active	Timothy	Santanelo
102330	Active	Roland	Richardson
102352	Active	Barbara	Hayes
102361	Active	Claude	Dortch
102385	Active	Marti	Schultz

2) Under **Reeher Predictive Scores**, choose **AF Expected Value**. You'll notice that the filter then moves under **Selected Columns**. Click **Submit**.

ADD COLUMNS

ALL COLUMN TYPES:
Checked items will appear in the list to right

Search

- Entity
- Contact Information
- School of Graduation
- Prospect Management
- Donor Attributes
- Reeher Predictive Scores**
 - AF EVI
 - AF Expected Value**
 - AF PDI
 - MG EVI
 - MG Expected Value
 - Previous AF EVI
 - Previous AF PDI
 - Previous MG EVI
- Consumer Variables
- Western University Specific
- Social Media

SELECTED COLUMNS:
Drag items in this list up or down to change display order


- Entity ID
- Relationship Status
- First Name
- Last Name
- AF Expected Value

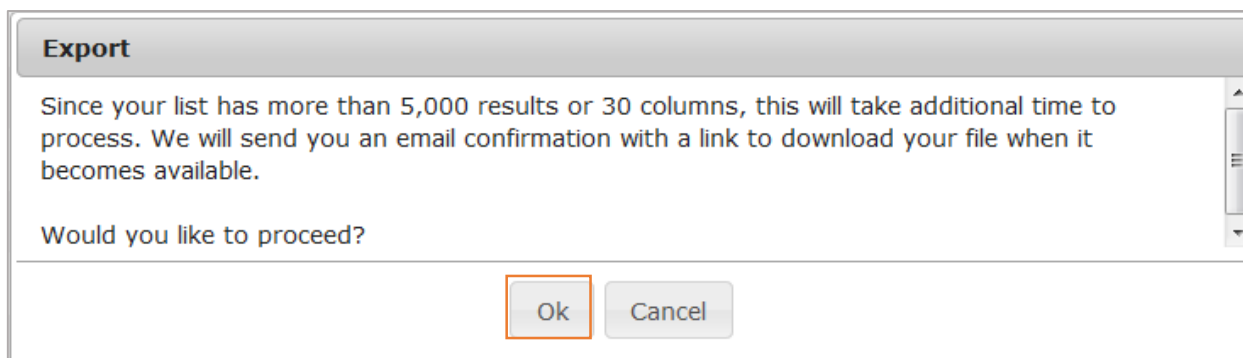
Submit Cancel

3) Your result set will change to reflect your selections.

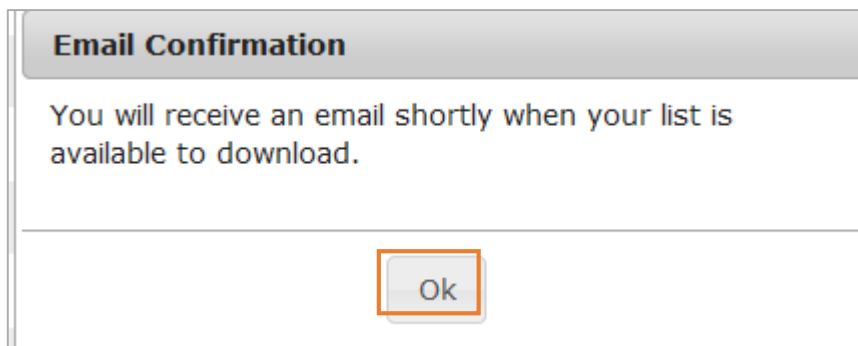
48,735 records found. export columns view

Entity ID	Relationship Status	First Name	Last Name	AF Expected Value
100133	Active	Nancy	Lane	\$192.12
100394	Active	William	Harris	\$3.26
100702	Active	Miriam	Maul	\$1,281.81
101128	Active	Thomas	Wheeler	\$0.00
101235	Active	Nancy	McGaughey	\$289.15
101263	Active	Dennis	Cowgill	\$3.26
101468	Active	Mary	Lichtenberg	\$0.00
101640	Active	Alfred	Wang	\$56.63
102048	Active	John	Tepe-Wherley	\$0.69
102305	Active	Steven	Brewer	\$1,463.29
102310	Active	Teddy	Reddy	\$82.43
102319	Active	Timothy	Santanelo	\$0.84
102330	Active	Roland	Richardson	\$3.00
102352	Active	Barbara	Hayes	\$0.00
102361	Active	Claude	Dortch	\$87.20
102385	Active	Marti	Schultz	\$8.45

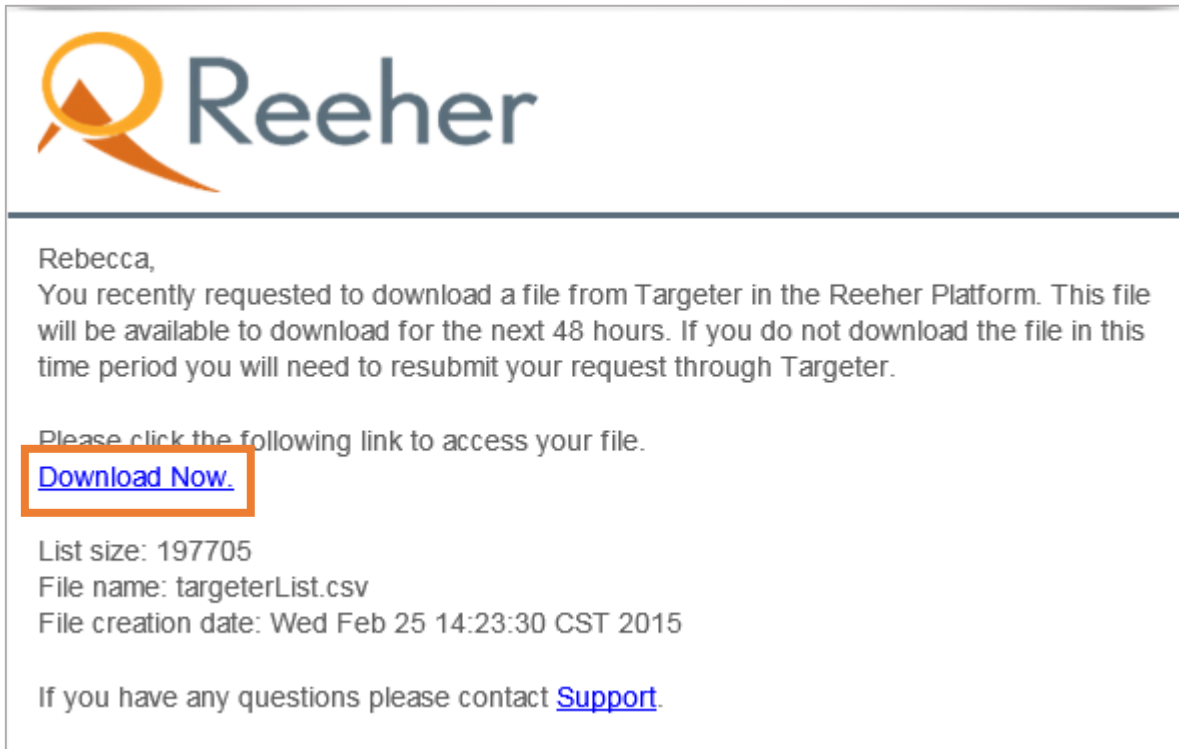
4) Export the result set by clicking on  **export** . If you have more than 5,000 records in your result set, you will get a message:



5) Click **OK**. You will receive an email confirmation message. Click **OK**:



6) Check your email. You should get a message that reads the following:



7) Click the **Download Now** link from within the email. The same columns that you displayed within the Platform will be at the top of your downloaded Excel document.

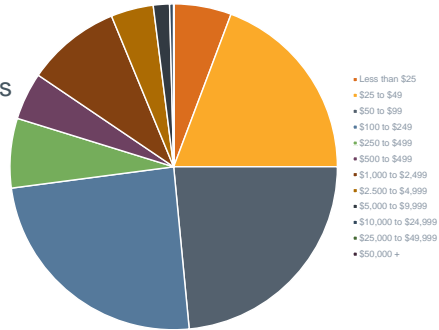
8) Using Excel formulas, sum the **AF Expected Value column**. To do so, scroll to the bottom of that column and enter into the cell the appropriate summing formula. The sum of those values is the expected value of the gifts from that particular segment.

Populate Your Donor Percentage Distribution

Gift Band Forecasting

What's the Path to \$10,000,000?

- Break down to gift band expectations and targets
- Start asking questions of what resources are needed to achieve those metrics



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Gift Band Forecasting – Working Exercise

FY Goal = 26,580 donors

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Gift Band	Gift Band Percentage	Donor Result	Avg. Dollar per Donor	Dollar Result
Less than \$25				
\$25 to \$49				
\$50 to \$99				
\$100 to \$249				
\$250 to \$499				
\$500 to \$999				
\$1,000 to \$2,499				
\$2,500 to \$4,999				
\$5,000 to \$9,999				




The next several slides will walk us through how to populate this working exercise.



Gift Band Donor Percentage Distribution

Gift Band	2011	2012	2013	2014	2015	Average
Less than \$25	5.28%	7.39%	8.01%	5.79%	6.35%	6.56%
\$25 to \$49	27.13%	24.90%	22.97%	23.85%	20.22%	23.82%
\$50 to \$99	19.29%	20.49%	22.97%	23.85%	20.22%	20.97%
\$100 to \$249	21.79%	20.82%	22.10%	22.72%	22.03%	22.79%
\$250 to \$499	5.91%	6.09%	6.13%	6.49%	7.36%	6.40%
\$500 to \$999	7.08%	5.26%	5.18%	5.11%	5.05%	5.53%
\$1,000 to \$2,499	10.30%	11.55%	11.30%	9.54%	8.94%	10.33%
\$2,500 to \$4,999	1.87%	2.04%	2.40%	2.04%	2.01%	2.07%
\$5,000 to \$9,999	1.11%	1.18%	1.34	1.37%	1.10%	1.23%

Use the average in the working exercise

Calculate Donor Percentages based on Donor #s on the AF Operating Report

1) Export your Annual Fund Operating Report, **Gift Band Summary Donor Performance** to Excel by clicking on the  in the upper right hand corner of that report.

Gift Band Summary							Period	Fiscal Year +		
Dollar Performance										
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change			
Less than \$25	\$19,165	\$27,368	\$27,930	\$19,560	\$18,917	(\$643)	-3.3%			
\$25 to \$49	\$154,204	\$147,378	\$136,423	\$121,983	\$108,348	(\$13,635)	-11.2%			
\$50 to \$99	\$249,709	\$281,725	\$251,952	\$286,891	\$226,873	(\$60,017)	-20.9%			
\$100 to \$249	\$647,049	\$654,192	\$634,584	\$685,822	\$611,044	(\$74,779)	-10.9%			
\$250 to \$499	\$414,453	\$425,150	\$405,121	\$429,193	\$374,388	(\$54,805)	-12.8%			
\$500 to \$999	\$521,642	\$533,558	\$508,372	\$538,853	\$478,448	(\$60,405)	-11.2%			
\$1,000 to \$2,499	\$2,403,347	\$2,337,044	\$2,046,453	\$2,032,996	\$1,543,815	(\$489,182)	-24.1%			
\$2,500 to \$4,999	\$1,521,587	\$1,738,794	\$2,218,897	\$1,898,359	\$788,275	(\$1,110,084)	-58.5%			
\$5,000 to \$9,999	\$1,368,257	\$1,464,221	\$1,629,196	\$1,630,174	\$989,783	(\$640,392)	-39.3%			
\$10,000 to \$24,999	\$531,743	\$622,554	\$671,902	\$787,943	\$537,643	(\$250,300)	-31.8%			
\$25,000 to \$49,999	\$96,835	\$89,658	\$27,047	\$108,687	\$64,616	(\$44,071)	-40.5%			
\$50,000+	\$180,089	\$224,614	\$369,226	\$348,047	\$230,606	(\$117,440)	-33.7%			
Total	\$8,108,079	\$8,546,256	\$8,927,102	\$8,888,508	\$5,972,755	(\$2,915,753)	-32.8%			
Donor Performance										
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change			
Less than \$25	1,360	2,015	2,182	1,449	1,382	-67	-4.6%			
\$25 to \$49	5,961	5,707	5,420	4,935	4,415	-520	-10.5%			
\$50 to \$99	4,933	5,499	5,260	6,008	4,738	-1,270	-21.1%			
\$100 to \$249	5,662	5,655	5,816	6,256	5,649	-607	-9.7%			
\$250 to \$499	1,610	1,625	1,636	1,778	1,566	-212	-11.9%			
\$500 to \$999	1,226	1,190	1,143	1,198	1,076	-122	-10.2%			
\$1,000 to \$2,499	2,740	2,669	2,403	2,375	1,894	-481	-20.3%			
\$2,500 to \$4,999	806	961	1,170	1,065	423	-642	-60.3%			
\$5,000 to \$9,999	341	392	412	403	243	-160	-39.7%			
\$10,000 to \$24,999	81	92	91	111	79	-32	-28.8%			
\$25,000 to \$49,999	5	4	2	6	4	-2	-33.3%			
\$50,000+	2	2	3	5	2	-3	-60.0%			
Total	24,727	25,811	25,538	25,589	21,471	-4,118	-16.1%			



2) Once exported, you will have an Excel document that looks like this:

Dollar Performance							
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change
Less than \$25	\$19,165.00	\$27,368.00	\$27,930.00	\$19,560.00	\$19,022.00	(\$538.00)	-2.8%
\$25 to \$49	\$154,204.00	\$147,378.00	\$136,423.00	\$121,983.00	\$108,858.00	(\$13,125.00)	-10.8%
\$50 to \$99	\$249,709.00	\$281,725.00	\$251,952.00	\$286,891.00	\$227,651.00	(\$59,240.00)	-20.6%
\$100 to \$249	\$647,049.00	\$654,192.00	\$634,584.00	\$685,822.00	\$612,989.00	(\$72,834.00)	-10.6%
\$250 to \$499	\$414,453.00	\$425,150.00	\$405,121.00	\$429,193.00	\$375,793.00	(\$53,400.00)	-12.4%
\$500 to \$999	\$521,642.00	\$533,558.00	\$508,372.00	\$538,853.00	\$478,498.00	(\$60,355.00)	-11.2%
\$1,000 to \$2,499	\$2,403,347.00	\$2,337,044.00	\$2,046,453.00	\$2,032,996.00	\$1,546,640.00	(\$486,357.00)	-23.9%
\$2,500 to \$4,999	\$1,521,587.00	\$1,738,794.00	\$2,218,897.00	\$1,898,359.00	\$794,025.00	(\$1,104,334.00)	-58.2%
\$5,000 to \$9,999	\$1,368,257.00	\$1,464,221.00	\$1,629,196.00	\$1,630,174.00	\$989,783.00	(\$640,392.00)	-39.3%
\$10,000 to \$24,999	\$531,743.00	\$622,554.00	\$671,902.00	\$787,943.00	\$537,643.00	(\$250,300.00)	-31.8%
\$25,000 to \$49,999	\$96,835.00	\$89,658.00	\$27,047.00	\$108,687.00	\$64,616.00	(\$44,071.00)	-40.5%
\$50,000+	\$180,089.00	\$224,614.00	\$369,226.00	\$348,047.00	\$230,606.00	(\$117,440.00)	-33.7%
Total	\$8,108,079.00	\$8,546,256.00	\$8,927,102.00	\$8,888,508.00	\$5,986,123.00	(\$2,902,385.00)	-32.7%
Donor Performance							
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change
Less than \$25	1,360	2,015	2,182	1,449	1,390	-59	-4.1%
\$25 to \$49	5,961	5,707	5,420	4,935	4,435	-500	-10.1%
\$50 to \$99	4,933	5,499	5,260	6,008	4,756	-1,252	-20.8%
\$100 to \$249	5,662	5,655	5,816	6,256	5,662	-594	-9.5%
\$250 to \$499	1,610	1,625	1,636	1,778	1,572	-206	-11.6%
\$500 to \$999	1,226	1,190	1,143	1,198	1,076	-122	-10.2%
\$1,000 to \$2,499	2,740	2,669	2,403	2,375	1,897	-478	-20.1%
\$2,500 to \$4,999	806	961	1,170	1,065	424	-641	-60.2%
\$5,000 to \$9,999	341	392	412	403	243	-160	-39.7%
\$10,000 to \$24,999	81	92	91	111	79	-32	-28.8%
\$25,000 to \$49,999	5	4	2	6	4	-2	-33.3%
\$50,000+	2	2	3	5	2	-3	-60.0%
Total	24,727	25,811	25,538	25,589	21,540	-4,049	-15.8%

Within the spreadsheet, **hide the Dollar Performance rows.**

Dollar Performance							
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change
Less than \$25	\$19,165.00	\$27,368.00	\$27,930.00	\$19,560.00	\$19,022.00	(\$538.00)	-2.8%
\$25 to \$49	\$154,204.00	\$147,378.00	\$136,423.00	\$121,983.00	\$108,858.00	(\$13,125.00)	-10.8%
\$50 to \$99	\$249,709.00	\$281,725.00	\$251,952.00	\$286,891.00	\$227,651.00	(\$59,240.00)	-20.6%
\$100 to \$249	\$647,049.00	\$654,192.00	\$634,584.00	\$685,822.00	\$612,989.00	(\$72,834.00)	-10.6%
\$250 to \$499	\$414,453.00	\$425,150.00	\$405,121.00	\$429,193.00	\$375,793.00	(\$53,400.00)	-12.4%
\$500 to \$999	\$521,642.00	\$533,558.00	\$508,372.00	\$538,853.00	\$478,498.00	(\$60,355.00)	-11.2%
\$1,000 to \$2,499	\$2,403,347.00	\$2,337,044.00	\$2,046,453.00	\$2,032,996.00	\$1,546,640.00	(\$486,357.00)	-23.9%
\$2,500 to \$4,999	\$1,521,587.00	\$1,738,794.00	\$2,218,897.00	\$1,898,359.00	\$794,025.00	(\$1,104,334.00)	-58.2%
\$5,000 to \$9,999	\$1,368,257.00	\$1,464,221.00	\$1,629,196.00	\$1,630,174.00	\$989,783.00	(\$640,392.00)	-39.3%
\$10,000 to \$24,999	\$531,743.00	\$622,554.00	\$671,902.00	\$787,943.00	\$537,643.00	(\$250,300.00)	-31.8%
\$25,000 to \$49,999	\$96,835.00	\$89,658.00	\$27,047.00	\$108,687.00	\$64,616.00	(\$44,071.00)	-40.5%
\$50,000+	\$180,089.00	\$224,614.00	\$369,226.00	\$348,047.00	\$230,606.00	(\$117,440.00)	-33.7%
Total	\$8,108,079.00	\$8,546,256.00	\$8,927,102.00	\$8,888,508.00	\$5,986,123.00	(\$2,902,385.00)	-32.7%
Donor Performance							
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change
Less than \$25	1,360	2,015	2,182	1,449	1,390	-59	-4.1%
\$25 to \$49	5,961	5,707	5,420	4,935	4,435	-500	-10.1%
\$50 to \$99	4,933	5,499	5,260	6,008	4,756	-1,252	-20.8%
\$100 to \$249	5,662	5,655	5,816	6,256	5,662	-594	-9.5%
\$250 to \$499	1,610	1,625	1,636	1,778	1,572	-206	-11.6%
\$500 to \$999	1,226	1,190	1,143	1,198	1,076	-122	-10.2%
\$1,000 to \$2,499	2,740	2,669	2,403	2,375	1,897	-478	-20.1%
\$2,500 to \$4,999	806	961	1,170	1,065	424	-641	-60.2%
\$5,000 to \$9,999	341	392	412	403	243	-160	-39.7%
\$10,000 to \$24,999	81	92	91	111	79	-32	-28.8%
\$25,000 to \$49,999	5	4	2	6	4	-2	-33.3%
\$50,000+	2	2	3	5	2	-3	-60.0%
Total	24,727	25,811	25,538	25,589	21,540	-4,049	-15.8%

3) Copy the Donor Performance rows to the empty rows below. Afterward, your spreadsheet should look like this:

Gift Band Summary							
Donor Performance							
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change
Less than \$25	1,360	2,015	2,182	1,449	1,390	-59	-4.1%
\$25 to \$49	5,961	5,707	5,420	4,935	4,435	-500	-10.1%
\$50 to \$99	4,933	5,499	5,260	6,008	4,756	-1,252	-20.8%
\$100 to \$249	5,662	5,655	5,816	6,256	5,662	-594	-9.5%
\$250 to \$499	1,610	1,625	1,636	1,778	1,572	-206	-11.6%
\$500 to \$999	1,226	1,190	1,143	1,198	1,076	-122	-10.2%
\$1,000 to \$2,499	2,740	2,669	2,403	2,375	1,897	-478	-20.1%
\$2,500 to \$4,999	806	961	1,170	1,065	424	-641	-60.2%
\$5,000 to \$9,999	341	392	412	403	243	-160	-39.7%
\$10,000 to \$24,999	81	92	91	111	79	-32	-28.8%
\$25,000 to \$49,999	5	4	2	6	4	-2	-33.3%
\$50,000+	2	2	3	5	2	-3	-60.0%
Total	24,727	25,811	25,538	25,589	21,540	-4,049	-15.8%
Donor Performance							
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change
Less than \$25	1,360	2,015	2,182	1,449	1,390	-59	-4.1%
\$25 to \$49	5,961	5,707	5,420	4,935	4,435	-500	-10.1%
\$50 to \$99	4,933	5,499	5,260	6,008	4,756	-1,252	-20.8%
\$100 to \$249	5,662	5,655	5,816	6,256	5,662	-594	-9.5%
\$250 to \$499	1,610	1,625	1,636	1,778	1,572	-206	-11.6%
\$500 to \$999	1,226	1,190	1,143	1,198	1,076	-122	-10.2%
\$1,000 to \$2,499	2,740	2,669	2,403	2,375	1,897	-478	-20.1%
\$2,500 to \$4,999	806	961	1,170	1,065	424	-641	-60.2%
\$5,000 to \$9,999	341	392	412	403	243	-160	-39.7%
\$10,000 to \$24,999	81	92	91	111	79	-32	-28.8%
\$25,000 to \$49,999	5	4	2	6	4	-2	-33.3%
\$50,000+	2	2	3	5	2	-3	-60.0%
Total	24,727	25,811	25,538	25,589	21,540	-4,049	-15.8%

4) Change the second "Donor Performance" label to read "% of Donor Performance"

Gift Band Summary							
Donor Performance							
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change
Less than \$25	1,360	2,015	2,182	1,449	1,390	-59	-4.1%
\$25 to \$49	5,961	5,707	5,420	4,935	4,435	-500	-10.1%
\$50 to \$99	4,933	5,499	5,260	6,008	4,756	-1,252	-20.8%
\$100 to \$249	5,662	5,655	5,816	6,256	5,662	-594	-9.5%
\$250 to \$499	1,610	1,625	1,636	1,778	1,572	-206	-11.6%
\$500 to \$999	1,226	1,190	1,143	1,198	1,076	-122	-10.2%
\$1,000 to \$2,499	2,740	2,669	2,403	2,375	1,897	-478	-20.1%
\$2,500 to \$4,999	806	961	1,170	1,065	424	-641	-60.2%
\$5,000 to \$9,999	341	392	412	403	243	-160	-39.7%
\$10,000 to \$24,999	81	92	91	111	79	-32	-28.8%
\$25,000 to \$49,999	5	4	2	6	4	-2	-33.3%
\$50,000+	2	2	3	5	2	-3	-60.0%
Total	24,727	25,811	25,538	25,589	21,540	-4,049	-15.8%
% of Donor Performance							
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change
Less than \$25	1,360	2,015	2,182	1,449	1,390	-59	-4.1%
\$25 to \$49	5,961	5,707	5,420	4,935	4,435	-500	-10.1%
\$50 to \$99	4,933	5,499	5,260	6,008	4,756	-1,252	-20.8%
\$100 to \$249	5,662	5,655	5,816	6,256	5,662	-594	-9.5%
\$250 to \$499	1,610	1,625	1,636	1,778	1,572	-206	-11.6%
\$500 to \$999	1,226	1,190	1,143	1,198	1,076	-122	-10.2%
\$1,000 to \$2,499	2,740	2,669	2,403	2,375	1,897	-478	-20.1%
\$2,500 to \$4,999	806	961	1,170	1,065	424	-641	-60.2%
\$5,000 to \$9,999	341	392	412	403	243	-160	-39.7%
\$10,000 to \$24,999	81	92	91	111	79	-32	-28.8%
\$25,000 to \$49,999	5	4	2	6	4	-2	-33.3%
\$50,000+	2	2	3	5	2	-3	-60.0%
Total	24,727	25,811	25,538	25,589	21,540	-4,049	-15.8%

5) In each cell, enter in a formula that will calculate the percentage of total donors that gave within that gift band for that fiscal year. For example In the cell that intersects with **Less than \$25** and **FY 2011** the Excel formula would be =SUM(B19/B47).

Gift Band Summary							
	Donor Performance						
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change
Less than \$25	1,360	2,015	2,182	1,449	1,390	-59	-4.1%
\$25 to \$49	5,961	5,707	5,420	4,935	4,435	-500	-10.1%
\$50 to \$99	4,933	5,499	5,260	6,008	4,756	-1,252	-20.8%
\$100 to \$249	5,662	5,655	5,816	6,256	5,662	-594	-9.5%
\$250 to \$499	1,610	1,625	1,636	1,778	1,572	-206	-11.6%
\$500 to \$999	1,226	1,190	1,143	1,198	1,076	-122	-10.2%
\$1,000 to \$2,499	2,740	2,669	2,403	2,375	1,897	-478	-20.1%
\$2,500 to \$4,999	806	961	1,170	1,065	424	-641	-60.2%
\$5,000 to \$9,999	341	392	412	403	243	-160	-39.7%
\$10,000 to \$24,999	81	92	91	111	79	-32	-28.8%
\$25,000 to \$49,999	5	4	2	6	4	-2	-33.3%
\$50,000+	2	2	3	5	2	-3	-60.0%
Total	24,727	25,811	25,538	25,589	21,540	-4,049	-15.8%
% of Donor Performance							
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change
Less than \$25	=SUM(B19/\$B47)	2,015	2,182	1,449	1,390	-59	-4.1%
\$25 to \$49		5,707	5,420	4,935	4,435	-500	-10.1%
\$50 to \$99		5,499	5,260	6,008	4,756	-1,252	-20.8%
\$100 to \$249		5,655	5,816	6,256	5,662	-594	-9.5%
\$250 to \$499		1,625	1,636	1,778	1,572	-206	-11.6%
\$500 to \$999		1,190	1,143	1,198	1,076	-122	-10.2%
\$1,000 to \$2,499		2,669	2,403	2,375	1,897	-478	-20.1%
\$2,500 to \$4,999		961	1,170	1,065	424	-641	-60.2%
\$5,000 to \$9,999		392	412	403	243	-160	-39.7%
\$10,000 to \$24,999		92	91	111	79	-32	-28.8%
\$25,000 to \$49,999		4	2	6	4	-2	-33.3%
\$50,000+		2	3	5	2	-3	-60.0%
Total	24,727	25,811	25,538	25,589	21,540	-4,049	-15.8%

Do this for all cells in the table. Once complete, it should look like this:

Gift Band Summary							
Giving Level	Donor Performance					Unit Change	% Change
	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015		
Less than \$25	1,360	2,015	2,182	1,449	1,390	-59	-4.1%
\$25 to \$49	5,961	5,707	5,420	4,935	4,435	-500	-10.1%
\$50 to \$99	4,933	5,499	5,260	6,008	4,756	-1,252	-20.8%
\$100 to \$249	5,662	5,655	5,816	6,256	5,662	-594	-9.5%
\$250 to \$499	1,610	1,625	1,636	1,778	1,572	-206	-11.6%
\$500 to \$999	1,226	1,190	1,143	1,198	1,076	-122	-10.2%
\$1,000 to \$2,499	2,740	2,669	2,403	2,375	1,897	-478	-20.1%
\$2,500 to \$4,999	806	961	1,170	1,065	424	-641	-60.2%
\$5,000 to \$9,999	341	392	412	403	243	-160	-39.7%
\$10,000 to \$24,999	81	92	91	111	79	-32	-28.8%
\$25,000 to \$49,999	5	4	2	6	4	-2	-33.3%
\$50,000+	2	2	3	5	2	-3	-60.0%
Total	24,727	25,811	25,538	25,589	21,540	-4,049	-15.8%
% of Donor Performance							
Giving Level	% of Donor Performance					Unit Change	% Change
	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015		
Less than \$25	5.50%	7.81%	8.54%	5.66%	6.45%	-59	-4.1%
\$25 to \$49	24.11%	22.11%	21.22%	19.29%	20.59%	-500	-10.1%
\$50 to \$99	19.95%	21.30%	20.60%	23.48%	22.08%	-1,252	-20.8%
\$100 to \$249	22.90%	21.91%	22.77%	24.45%	26.29%	-594	-9.5%
\$250 to \$499	6.51%	6.30%	6.41%	6.95%	7.30%	-206	-11.6%
\$500 to \$999	4.96%	4.61%	4.48%	4.68%	5.00%	-122	-10.2%
\$1,000 to \$2,499	11.08%	10.34%	9.41%	9.28%	8.81%	-478	-20.1%
\$2,500 to \$4,999	3.26%	3.72%	4.58%	4.16%	1.97%	-641	-60.2%
\$5,000 to \$9,999	1.38%	1.52%	1.61%	1.57%	1.13%	-160	-39.7%
\$10,000 to \$24,999	0.33%	0.36%	0.36%	0.43%	0.37%	-32	-28.8%
\$25,000 to \$49,999	0.02%	0.02%	0.01%	0.02%	0.02%	-2	-33.3%
\$50,000+	0.01%	0.01%	0.01%	0.02%	0.01%	-3	-60.0%
Total	24,727	25,811	25,538	25,589	21,540	-4,049	-15.8%

3) Hide the columns labeled **Unit Change** and **% Change**. Add a column to the right and name it **Average**. Calculate the average percentage of donor participation for each gift band in that column. Once complete, it should look like this:

% of Donor Performance							
Giving Level	% of Donor Performance					Average	
	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015		
Less than \$25	5.50%	7.81%	8.54%	5.66%	6.45%	6.79%	
\$25 to \$49	24.11%	22.11%	21.22%	19.29%	20.59%	21.46%	
\$50 to \$99	19.95%	21.30%	20.60%	23.48%	22.08%	21.48%	
\$100 to \$249	22.90%	21.91%	22.77%	24.45%	26.29%	23.66%	
\$250 to \$499	6.51%	6.30%	6.41%	6.95%	7.30%	6.69%	
\$500 to \$999	4.96%	4.61%	4.48%	4.68%	5.00%	4.74%	
\$1,000 to \$2,499	11.08%	10.34%	9.41%	9.28%	8.81%	9.78%	
\$2,500 to \$4,999	3.26%	3.72%	4.58%	4.16%	1.97%	3.54%	
\$5,000 to \$9,999	1.38%	1.52%	1.61%	1.57%	1.13%	1.44%	
\$10,000 to \$24,999	0.33%	0.36%	0.36%	0.43%	0.37%	0.37%	
\$25,000 to \$49,999	0.02%	0.02%	0.01%	0.02%	0.02%	0.02%	
\$50,000+	0.01%	0.01%	0.01%	0.02%	0.01%	0.01%	
Total	24,727	25,811	25,538	25,589	21,540		

*Please note some calculations may not add up in the examples as we are using a test database for these screenshots.

4) Use the values in the **Average** column to fill in the Working Exercise sheet below:

19

Gift Band Forecasting – Working Exercise

FY Goal = 26,580 donors

Gift Band	Gift Band Percentage	Donor Result	Avg. Dollar per Donor	Dollar Result
Less than \$25	6.56%			
\$25 to \$49	23.82%			
\$50 to \$99	20.97%			
\$100 to \$249	22.79%			
\$250 to \$499	6.40%			
\$500 to \$999	5.53%			
\$1,000 to \$2,499	10.33%			
\$2,500 to \$4,999	2.07%			
\$5,000 to \$9,999	1.23%			

↑
2

5) The next step is to calculate the **Donor Result** values to enter into the working exercise above. Use the formula below:

Gift Band Forecasting – Determining Gift Band Donor Results

Gift Band % of Donors

X

Total Target # of Donors

=

Target Donors for Gift Band

6.40%

X

26,580

=

1,701

Gift Band
\$250 - \$499

ANNUAL GIVING

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From the Working Exercise sheet, take your Donor Goal and multiply it by the Gift Band % of Donors to fill in each cell. Once complete, it should look like this:

21

Gift Band Forecasting – Working Exercise

FY Goal = 26,580 donors

Gift Band	%	Donor Result	Avg. Dollar per Donor	Dollar Result
Less than \$25	6.56%	1,743		
\$25 to \$49	23.82%	6,331		
\$50 to \$99	20.97%	5,573		
\$100 to \$249	22.79%	6,057		
\$250 to \$499	6.40%	1,701		
\$500 to \$999	5.53%	1,470		
\$1,000 to \$2,499	10.33%	2,745		
\$2,500 to \$4,999	2.07%	550		
\$5,000 to \$9,999	1.23%	327		



6) Calculate the **Average Dollar per Donor** using the formula below.

22

Gift Band Forecasting – Using Operating Reports to Calculate Avg Dollar per Donor

		Dollar Performance						
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change	
Less than \$25	\$19,165	\$27,368	\$27,930	\$19,560	\$17,711	(\$1,849)	-9.5%	
\$25 to \$49	\$154,204	\$147,378	\$136,423	\$121,983	\$102,397	(\$19,586)	-16.1%	
\$50 to \$99	\$249,709	\$281,725	\$251,952	\$286,891	\$217,536	(\$69,354)	-24.2%	
\$100 to \$249	\$647,049	\$654,192	\$634,584	\$685,822	\$591,655	(\$94,167)	-13.7%	
\$250 to \$499	\$414,453	\$425,150	\$485,121	\$429,193	\$382,952	(\$46,240)	-10.4%	
\$500 to \$999	\$521,642	\$533,558	\$508,372	\$538,853	\$456,148	(\$82,706)	-15.3%	
\$1,000 to \$2,499	\$2,493,347	\$2,337,044	\$2,046,453	\$2,032,996	\$1,494,379	(\$538,617)	-26.5%	
\$2,500 to \$4,999	\$1,521,587	\$1,738,794	\$2,218,897	\$1,898,359	\$769,319	(\$1,129,040)	-59.5%	
\$5,000 to \$9,999	\$1,368,257	\$1,464,221	\$1,629,196	\$1,630,174	\$959,662	(\$670,512)	-41.1%	
\$10,000 to \$24,999	\$531,743	\$622,554	\$671,902	\$787,943	\$602,753	(\$285,190)	-36.2%	
\$25,000 to \$49,999	\$96,835	\$89,658	\$27,047	\$108,687	\$100,850	(\$7,837)	-7.2%	
\$50,000+	\$180,089	\$224,614	\$369,226	\$348,047	\$180,171	(\$167,875)	-49.2%	
Total	\$8,108,079	\$8,546,296	\$8,927,102	\$8,888,508	\$5,755,534	(\$3,132,974)	-35.2%	

$$\frac{\text{Total Dollars}}{\text{Total Donors}} = \text{Total \$ per Donor}$$

$$\frac{\$414,453}{1,610} = \$257.42$$

Example uses the \$250 - \$499 gift band

7) Populate the Working Exercise table so that it reflects the results. You can use the same export from the **Annual Fund Operating Reports** that you did earlier, only focusing on both the **Dollar and Donor Performance**. From where you left off, you only need to **unhide** the rows to display the Dollar Performance. Once you do that, it should look like this:

Dollar Performance							
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change
Less than \$25	\$19,165.00	\$27,368.00	\$27,930.00	\$19,560.00	\$19,022.00	(\$538.00)	-2.8%
\$25 to \$49	\$154,204.00	\$147,378.00	\$136,423.00	\$121,983.00	\$108,858.00	(\$13,125.00)	-10.8%
\$50 to \$99	\$249,709.00	\$281,725.00	\$251,952.00	\$286,891.00	\$227,651.00	(\$59,240.00)	-20.6%
\$100 to \$249	\$647,049.00	\$654,192.00	\$634,584.00	\$685,822.00	\$612,989.00	(\$72,834.00)	-10.6%
\$250 to \$499	\$414,453.00	\$425,150.00	\$405,121.00	\$429,193.00	\$375,793.00	(\$53,400.00)	-12.4%
\$500 to \$999	\$521,642.00	\$533,558.00	\$508,372.00	\$538,853.00	\$478,498.00	(\$60,355.00)	-11.2%
\$1,000 to \$2,499	\$2,403,347.00	\$2,337,044.00	\$2,046,453.00	\$2,032,996.00	\$1,546,640.00	(\$486,357.00)	-23.9%
\$2,500 to \$4,999	\$1,521,587.00	\$1,738,794.00	\$2,218,897.00	\$1,898,359.00	\$794,025.00	(\$1,104,334.00)	-58.2%
\$5,000 to \$9,999	\$1,368,257.00	\$1,464,221.00	\$1,629,196.00	\$1,630,174.00	\$989,783.00	(\$640,392.00)	-39.3%
\$10,000 to \$24,999	\$531,743.00	\$622,554.00	\$671,902.00	\$787,943.00	\$537,643.00	(\$250,300.00)	-31.8%
\$25,000 to \$49,999	\$96,835.00	\$89,658.00	\$27,047.00	\$108,687.00	\$64,616.00	(\$44,071.00)	-40.5%
\$50,000+	\$180,089.00	\$224,614.00	\$369,226.00	\$348,047.00	\$230,606.00	(\$117,440.00)	-33.7%
Total	\$8,108,079.00	\$8,546,256.00	\$8,927,102.00	\$8,888,508.00	\$5,986,123.00	(\$2,902,385.00)	-32.7%
Donor Performance							
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Unit Change	% Change
Less than \$25	1,360	2,015	2,182	1,449	1,390	-59	-4.1%
\$25 to \$49	5,961	5,707	5,420	4,935	4,435	-500	-10.1%
\$50 to \$99	4,933	5,499	5,260	6,008	4,756	-1,252	-20.8%
\$100 to \$249	5,662	5,655	5,816	6,256	5,662	-594	-9.5%
\$250 to \$499	1,610	1,625	1,636	1,778	1,572	-206	-11.6%
\$500 to \$999	1,226	1,190	1,143	1,198	1,076	-122	-10.2%
\$1,000 to \$2,499	2,740	2,669	2,403	2,375	1,897	-478	-20.1%
\$2,500 to \$4,999	806	961	1,170	1,065	424	-641	-60.2%
\$5,000 to \$9,999	341	392	412	403	243	-160	-39.7%
\$10,000 to \$24,999	81	92	91	111	79	-32	-28.8%
\$25,000 to \$49,999	5	4	2	6	4	-2	-33.3%
\$50,000+	2	2	3	5	2	-3	-60.0%
Total	24,727	25,811	25,538	25,589	21,540	-4,049	-15.8%

8) Use the formula from the slide above to calculate the average dollar per donor. **Hide** the columns for **Unit Change** and **% Change**, and add in a new section called **Average Donor per Dollar**. Beneath that section, **add** columns for each fiscal year. **Calculate** per gift band and fiscal year using the dollar amount for a gift band divided by the donor number for that gift band.

Dollar Performance						Average Dollar per Donor				
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015
Less than \$25	\$19,165.00	\$27,368.00	\$27,930.00	\$19,560.00	\$19,022.00	\$14.09	\$13.58	\$12.80	\$13.50	\$13.68
\$25 to \$49	\$154,204.00	\$147,378.00	\$136,423.00	\$121,983.00	\$108,858.00	\$25.87	\$25.82	\$25.17	\$24.72	\$24.55
\$50 to \$99	\$249,709.00	\$281,725.00	\$251,952.00	\$286,891.00	\$227,651.00	\$50.62	\$51.23	\$47.90	\$47.75	\$47.87
\$100 to \$249	\$647,049.00	\$654,192.00	\$634,584.00	\$685,822.00	\$612,989.00	\$114.28	\$115.68	\$109.11	\$109.63	\$108.26
\$250 to \$499	\$414,453.00	\$425,150.00	\$405,121.00	\$429,193.00	\$375,793.00	\$257.42	\$261.63	\$247.63	\$241.39	\$239.05
\$500 to \$999	\$521,642.00	\$533,558.00	\$508,372.00	\$538,853.00	\$478,498.00	\$425.48	\$448.37	\$444.77	\$449.79	\$444.70
\$1,000 to \$2,499	\$2,403,347.00	\$2,337,044.00	\$2,046,453.00	\$2,032,996.00	\$1,546,640.00	\$877.13	\$875.63	\$851.62	\$856.00	\$815.31
\$2,500 to \$4,999	\$1,521,587.00	\$1,738,794.00	\$2,218,897.00	\$1,898,359.00	\$794,025.00	\$1,887.83	\$1,809.36	\$1,896.49	\$1,782.50	\$1,872.70
\$5,000 to \$9,999	\$1,368,257.00	\$1,464,221.00	\$1,629,196.00	\$1,630,174.00	\$989,783.00	\$4,012.48	\$3,735.26	\$3,954.36	\$4,045.10	\$4,073.18
\$10,000 to \$24,999	\$531,743.00	\$622,554.00	\$671,902.00	\$787,943.00	\$537,643.00	\$6,564.73	\$6,766.89	\$7,383.54	\$7,098.59	\$6,805.61
\$25,000 to \$49,999	\$96,835.00	\$89,658.00	\$27,047.00	\$108,687.00	\$64,616.00	\$19,367.00	\$22,414.50	\$13,523.50	\$18,114.50	\$16,154.00
\$50,000+	\$180,089.00	\$224,614.00	\$369,226.00	\$348,047.00	\$230,606.00	\$90,044.50	\$112,307.00	\$123,075.33	\$69,609.40	\$115,303.00
Total	\$8,108,079.00	\$8,546,256.00	\$8,927,102.00	\$8,888,508.00	\$5,986,123.00					
Donor Performance										
Giving Level	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015					
Less than \$25	1,360	2,015	2,182	1,449	1,390					
\$25 to \$49	5,961	5,707	5,420	4,935	4,435					
\$50 to \$99	4,933	5,499	5,260	6,008	4,756					
\$100 to \$249	5,662	5,655	5,816	6,256	5,662					
\$250 to \$499	1,610	1,625	1,636	1,778	1,572					
\$500 to \$999	1,226	1,190	1,143	1,198	1,076					
\$1,000 to \$2,499	2,740	2,669	2,403	2,375	1,897					
\$2,500 to \$4,999	806	961	1,170	1,065	424					
\$5,000 to \$9,999	341	392	412	403	243					
\$10,000 to \$24,999	81	92	91	111	79					
\$25,000 to \$49,999	5	4	2	6	4					
\$50,000+	2	2	3	5	2					
Total	24,727	25,811	25,538	25,589	21,540					

9) Average the five fiscal years for each gift band:

23

Gift Band Forecasting – Dollars per Donor

Gift Band	FY2011	FY2012	FY2013	FY2014	FY2015	Average
Less than \$25	\$14.19	\$13.51	\$12.83	\$13.64	\$13.54	\$13.54
\$25 to \$49	\$25.62	\$25.54	\$24.74	\$24.44	\$24.57	\$24.98
\$50 to \$99	\$49.86	\$50.79	\$47.60	\$46.88	\$47.39	\$48.61
\$100 to \$249	\$110.67	\$112.91	\$107.98	\$106.06	\$108.38	\$109.20
\$250 to \$499	\$241.01	\$251.85	\$244.32	\$229.91	\$239.41	\$241.16
\$500 to \$999	\$403.46	\$450.40	\$436.24	\$448.63	\$438.18	\$435.38
\$1000 to \$2,499	\$782.02	\$780.31	\$802.66	\$787.96	\$811.72	\$792.94
\$2,500 to \$4,999	\$1,914.89	\$1,895.30	\$1,854.20	\$1,695.58	\$1,853.78	\$1,842.75
\$5,000 to \$9,999	\$4,014.64	\$3,658.65	\$3,936.69	\$3,969.76	\$4,032.19	\$3,922.39

Use the average in the working exercise

10) Use those averages in the Working Exercise:

24

Gift Band Forecasting – Working Exercise

FY Goal = 26,580 donors
Total Dollar Result = \$6,637,052.52

Gift Band	%	Donor Result	Avg. Dollar per Donor	Dollar Result
Less than \$25	6.56%	1,743	\$13.54	\$23,600.22
\$25 to \$49	23.82%	6,331	\$24.98	\$158,148.38
\$50 to \$99	20.97%	5,573	\$48.61	\$270,903.53
\$100 to \$249	22.79%	6,057	\$109.20	\$661,424.40
\$250 to \$499	6.40%	1,701	\$241.16	\$410,213.16
\$500 to \$999	5.53%	1,470	\$435.38	\$640,008.60
\$1,000 to \$2,499	10.33%	2,745	\$792.94	\$2,176,620.30
\$2,500 to \$4,999	2.07%	550	\$1,842.75	\$1,013,512.40
\$5,000 to \$9,999	1.23%	327	\$3,922.39	\$1,282,621.53

Avg. Dollar per Donor

x

Donor Result

=

Dollar Result

↑
4

↑
5

11) To get the **Donor Result**, simply multiply the **Average Dollar per Donor** by the **Donor Result** column. This will give you the forecasted **Dollar Result** for each gift band. See above image.

12) Total the Dollar Result Column and subtract total from goal. This will give you the amount to plan for the leadership annual giving effort.

Will we make it?


FY Goal = 26,580
Total Dollar Result = \$6,637,052.52

(\$3,336,297.48)

Participation: 12%
Dollars: \$10,000,000

ANNUAL GIVING
BOOT CAMP

MARCH 17-18, 2015 | MINNEAPOLIS



For questions on this exercise or any other Reeher related topics, please reach out to your school’s Customer Success Manager or Customer Support at Support@reeher.com.