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www.afpfep.org



AFP
Association of
Fundraising Professionals
Association des professionnels
en philanthropie

**Using the FEP
to Improve and Accelerate your
Fundraising Results.**


Nowshad (Shad) Ali, CFRE



DPC3
CONFERENCE



**GROWTH
IN GIVING**



**FUNDRAISING
EFFECTIVENESS
project**

1

**ABOUT AFP AND THE AFP FOUNDATION FOR
PHILANTHROPY - CANADA**

- The Association of fundraising professionals (AFP) is the largest association of fundraising professionals in the world. AFP has over 32,000 members world-wide with 3,800 of them in Canada. AFP promotes the importance and value of philanthropy, and enables people and organizations to practice ethical and effective fundraising. AFP Canada was formally created in 2017.

- The philanthropic arm of AFP, the AFP Foundation for Philanthropy – Canada, supports many programs and services through its fundraising efforts. Fulfilling the promise of philanthropy by funding programs and services in the areas of research, diversity & Inclusion, supporting the profession and leadership. To find out more, please visit www.afpnet.org/afpcanada

The AFP Foundation for Philanthropy – Canada Research Committee conducts an annual “Call for Research” and will be releasing “Retail demand for impact investing” by John Gormaly and Dr. Brent McKnight within the next two weeks. Please visit www.afpnet.org/afpcanada to see the research.

2

What is the Growth in Giving Initiative?

- Many Projects:
 - Fundraising Fitness Test, Fundraising Analytics, Research, Convening, Database, Indices, Training and Education (Planning to Keep Your Donors Workshop), Fundraising Effectiveness Project, and More!



3

Growth in Giving Initiative Database

The Growth in Giving Database (GiG) is a Big Data, 'anonymized' collection of more than 176 million gifts made to more than 20,000 nonprofit organizations valuing over \$84 billion.

Several years in the making, the data is collected through a unique and collaborative partnership with the leading names in the fundraising software space, including DonorPerfect, Bloomerang, and Neon CRM.

In addition, the project is supported by summary data from [Clearview CRM](#).



4



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What Canadian Donors Want Study

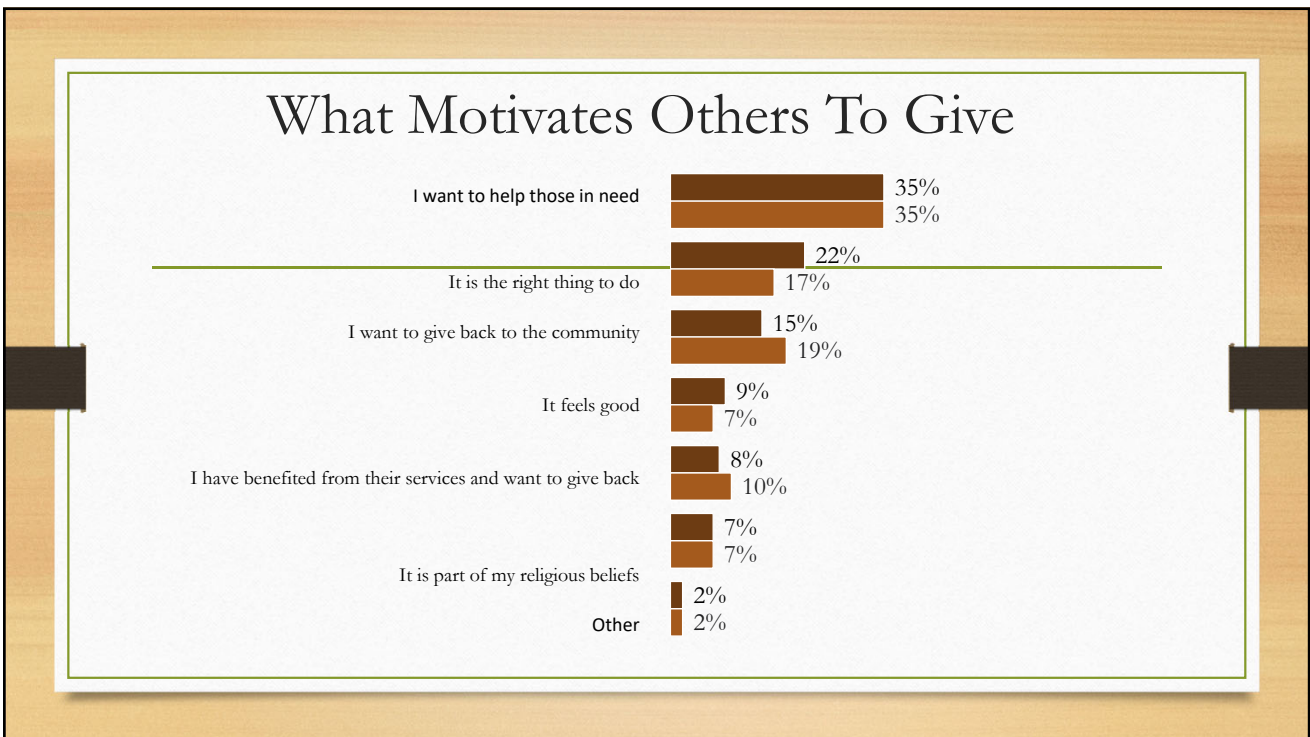
Institution	Public Confidence
Charitable Sector – includes charities and not-for-profits	75%
Private Sector Organizations	63%
Public Sector, includes Federal, provincial and Municipal levels of government	49%

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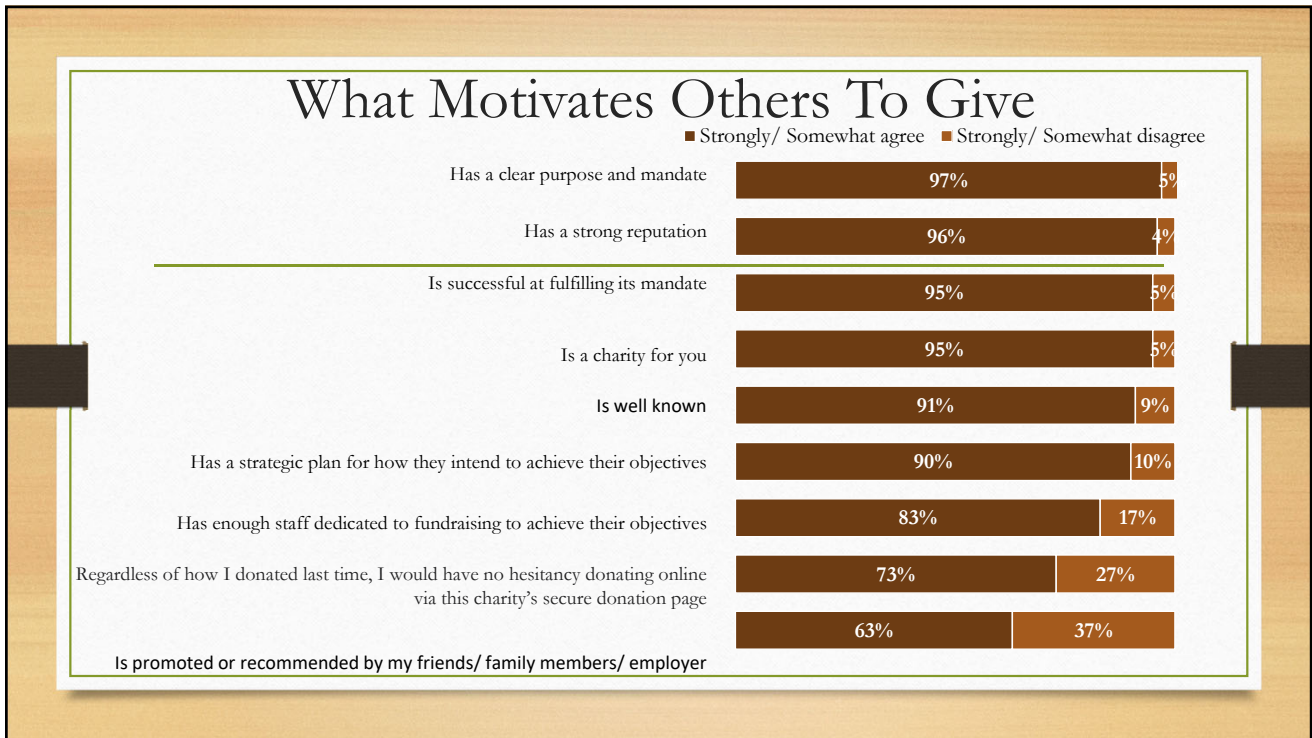
Motivations For Giving

- Why Do you support the Charitable organizations and issues you do?
- What drives you to support your organization?
- What Drives/Motivates Others to Give?

9



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11

Fundraising Effectiveness Project

Quarterly Fundraising Report™

Year to date nonprofit sector trends
01/01/2019 to 3/31/2019

Revenue and retention metrics report on year-to-date (YTD) performance compared against the prior year total based on a panel* of organizations selected from the Growth in Giving Database of 176 million transactions from more than 20,000 organizations and \$80 billion in donations since 2005.

13

13

Questions, Questions, Questions

- How many new donors did you attract in 2019 so far?
 - Was that more new donors that you had in the same period last year?
 - How does that compare to other organizations?
- How much money have you raised in 2019 thus far?
 - What percent of goal is that?
 - How does that compare to the same period last year?
 - How does that compare to other organizations?
 - Will you raise more money this year than last?

14

14

Questions, Questions, Questions

- What About Recaptured Donors?
 - And how much money from this group or segment?
- What about renewed donors?
 - And how much money from this group?
- What about your Pareto Principle effect? (80/20Rule)

15

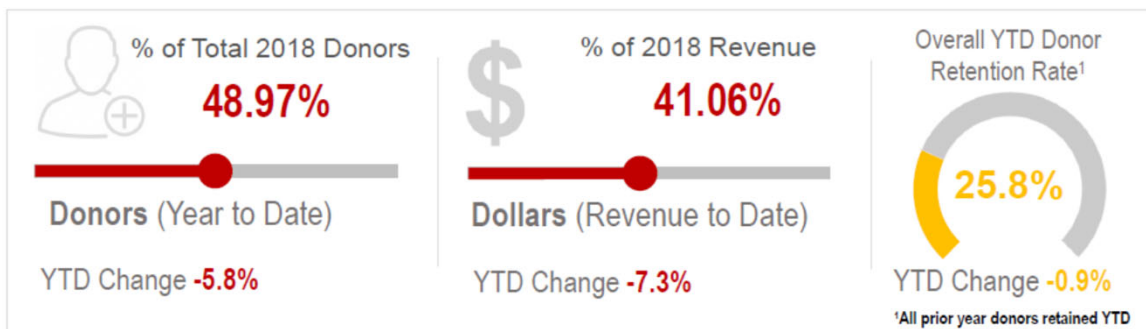
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Questions, Questions, Questions

- What if you were asked to raise 20% more \$\$\$\$ than you did last year?
 - Is it possible?
 - How would you do it?
 - What is your best tactic? That has the best chance of success? And can you enumerate that?

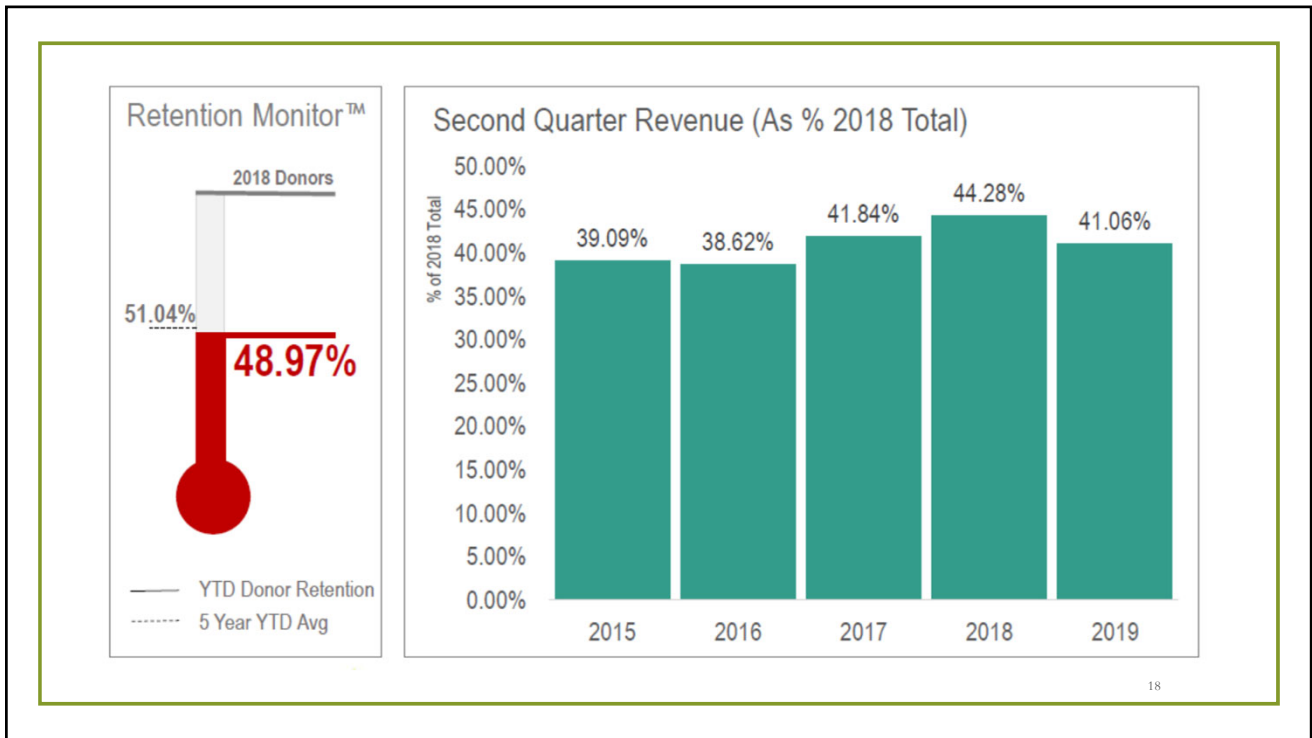
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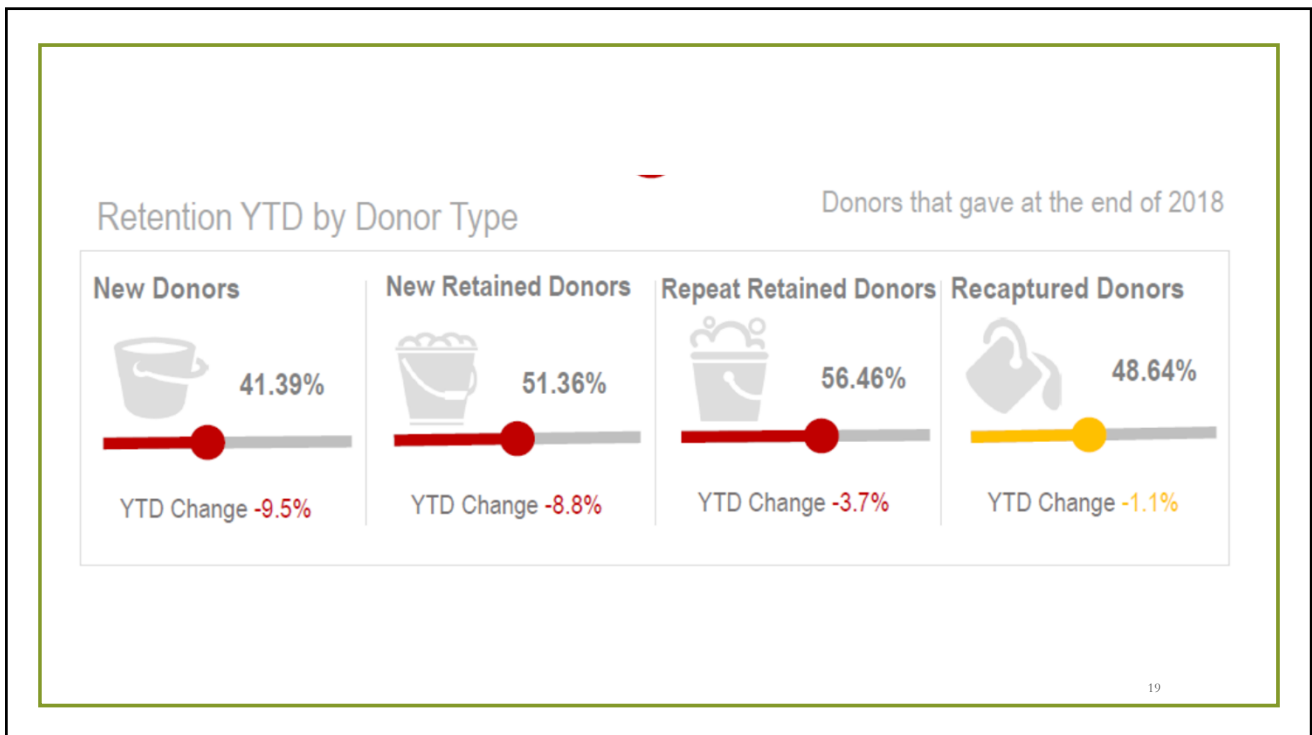


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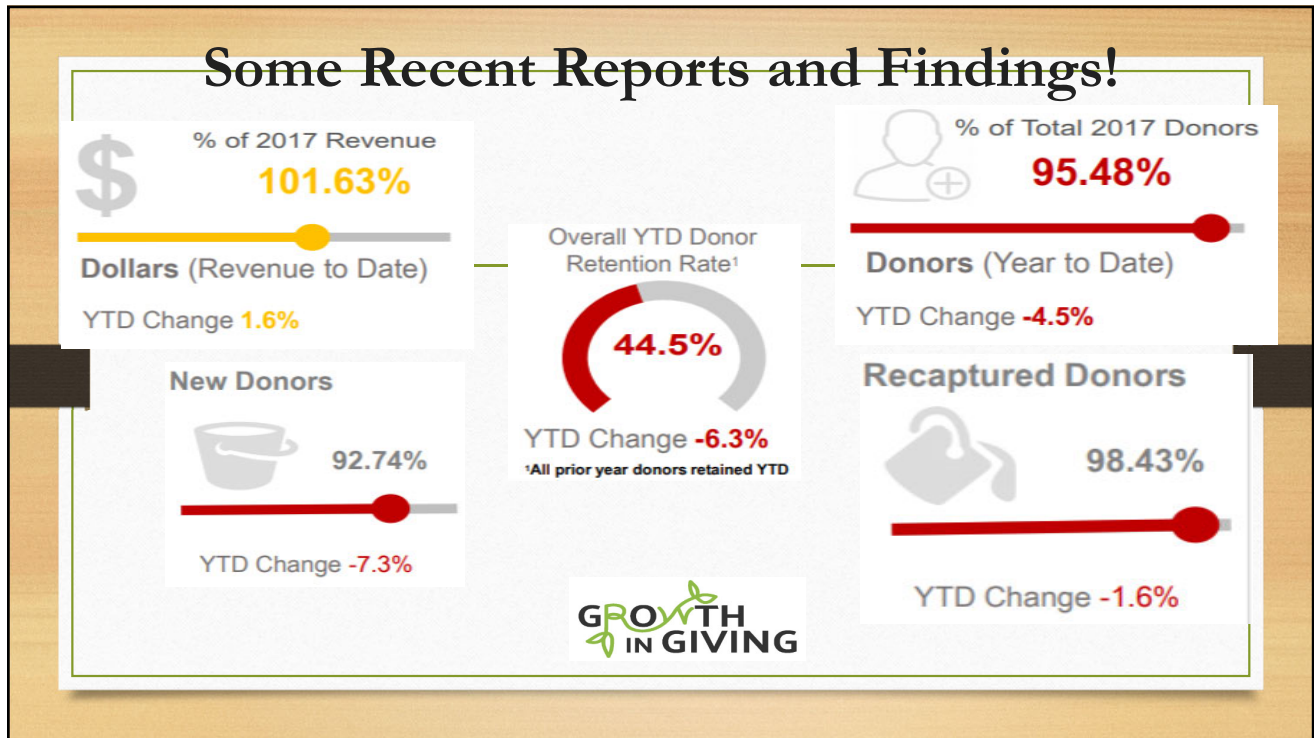
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How Many of Us Look at Fundraising Metrics?

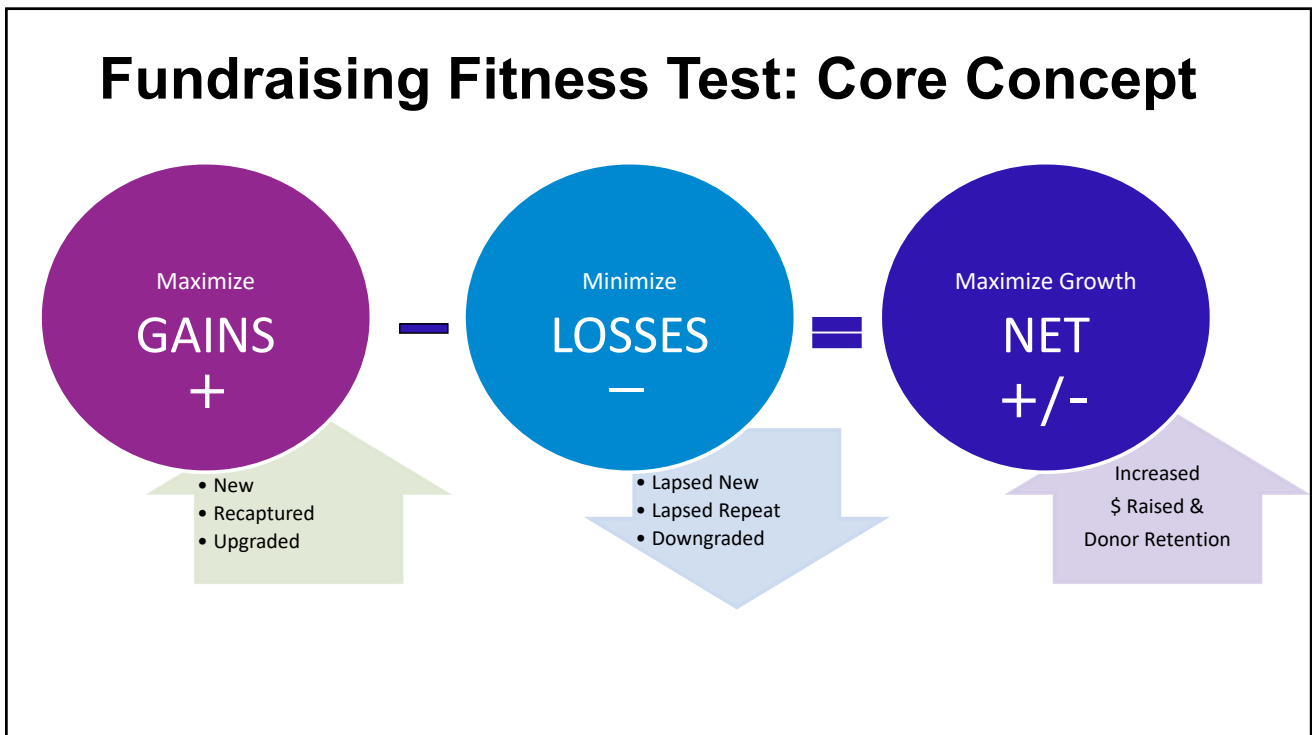
- Did We Make Our Goal of \$X?
- Is My CEO Content?
- Is Our Board Satisfied? Do they really want to know CTRAD? OR?
- Are the Budget Needs Fulfilled?
- Is Our Mission Being Fulfilled (Enough?!)?
- Other?

21

What is the Fundraising Fitness Test?

- A TOOL NONPROFIT ORGANIZATIONS CAN USE FOR FREE** (Icon: Red square with a document and a checkmark)
- ENABLES NONPROFITS TO UNDERSTAND AND MONITOR THEIR PHILANTHROPIC METRICS** (Icon: Green square with a fingerprint)
- WORKS WITH ANY SOFTWARE AND RELIES ON ONLY ONLY THREE FIELDS!** (Icon: Purple square with a document and a list)
- IT IS FREE AND AFP WANTS YOU TO USE IT!** (Icon: Blue square with a graduation cap)
- WWW.AFPFEP.ORG/TOOLS** (Icon: Orange square with a location pin)

22



23

How does the Fundraising Fitness Test Work?

	A	B	C	D	E	F	G
1	Donor ID	Gift Date	Gift Amount	Fundraising Identifier			
2	000000000200	1/3/2007	\$24	AC			
3	000000000200	2/5/2007	\$4,302	AC			
4	000000000200	2/22/2007	\$1,389	AC			
5	000000000200	3/9/2007	\$4,164	AC			
6	000000000200	4/2/2007	\$50	AC			
7	000000000200	4/3/2007	\$31	AC			
8	000000000200	4/9/2007	\$5,696	AC			
9	000000000200	4/10/2007	\$2,084	AC			
10	000000000200	4/30/2007	\$100	AC			
11	000000000200	5/9/2007	\$8,319	AC			
12	000000000200	5/17/2007	\$1,350	AC			
13	000000000200	5/21/2007	\$785	AC			
14	000000000200	6/5/2007	\$596	AC			
15	000000000200	6/7/2007	\$12,591	AC			
16	000000000200	6/27/2007	\$56	AC			
17	000000000200	7/11/2007	\$4	AC			
18	000000000200	7/13/2007	\$6,689	AC			
19	000000000200	8/15/2007	\$7,353	AC			
20	000000000200	8/20/2007	\$46	AC			
21	000000000200	9/27/2007	\$2,378	AC			
22	000000000200	11/6/2007	\$652	AC			

24

24

What does it tell you?

Figure1 GiGi Fundraising Fitness Test

Gain/Loss Growth-in-Giving Performance Report for --> <-- Year-end month
2013

Base: Total all donors Average/Mean

Gain/Loss Category	Period 1 2012 (A\$)	Period 2 2013 (B\$)	Gains (Losses) (C\$=B-A)	Gain/Loss Ratio (D%=C/total)
Amount of Gifts				
Gains				
New	\$ 0	\$ 55,526	\$ 55,526	37.5%
Recapture	0	5,785	5,785	3.9%
Upgrade	46,414	83,265	36,851	24.9%
Subtotal gains	46,414	144,576	98,162	66.3%
Same	43,274	43,274	-	0.0%
Losses				
Downgrade	19,121	12,581	(6,541)	-4.4%
Lapsed new	13,409	0	(13,409)	-9.1%
Lapsed repeat	25,885	0	(25,885)	-17.5%
Subtotal losses	58,415	12,581	(45,835)	-30.9%
Total - gifts	\$ 148,103	\$ 200,430	\$ 52,327	35.3%

Overall rate of growth

25

Fundraising Effectiveness Project: Fundraising Fitness Test

- Performance Indicators derived from 3 data inputs: **donor ID#, gift date, gift amount**
- Allows organizations to use **hard data**

Fundraising Performance Indicators						
Using Gift Transaction Data By Giving Level/Range						
Fundraising Performance Indicator	All Donors	Giving Level/Range				
		Under \$100	\$100-\$249	\$250-\$999	\$1,000 - \$4,999	\$5,000 & Up
Donor retention rate						
1 New donor retention rate	17%	8%	24%	37%	54%	100%
2 Repeat donor retention rate	47%	27%	49%	55%	74%	73%
3 Overall donor retention rate	33%	16%	37%	50%	68%	75%
Donor gains, losses & net						
5 Donor gains	303	173	70	38	18	4
7 Donor losses	516	336	91	52	29	8
11 Net gain in donors	(70)	(94)	(30)	(37)	(61)	(100)
Number of donors						
13 Overall donors retained	255	62	54	52	63	24
16 Percent of Year2 donors by range	100%	42%	22%	16%	15%	5%
Amount of gifts						
18 Percent of Year2 gift\$ by range	100%	2%	4%	8%	32%	54%
19 Average gift size	\$ 662	\$ 33	\$ 118	\$ 342	\$ 1,416	\$ 6,994
Dollar gains, losses & net						
20 Dollar gains	\$ 172,657	\$ 6,059	\$ 9,467	\$ 18,041	\$ 49,562	\$ 89,529
22 Dollar losses	\$ 115,796	\$ 9,322	\$ 11,655	\$ 21,380	\$ 48,698	\$ 24,740
26 Net gain in gifts	\$ 33	\$ (54)	\$ (23)	\$ (19)	\$ 2	\$ 72
Growth in giving (GIG)						
39 Overall rate of growth in gifts	19%	-30%	-13%	-10%	1%	49%
Growth in donors						
43 Overall rate of growth in donors	-28%	-41%	-14%	-13%	-12%	-13%

26

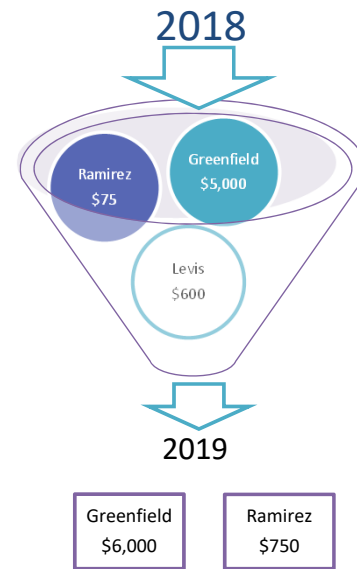
Donors and Dollars...and Focus!

Fundraising Performance Indicator	All Donors	Giving Level/Range				
		Donors Under \$100	\$100 to \$249	\$250 to \$999	\$1,000 to \$4,999	Donors \$5,000 & Up
Number of donors						
Overall donors retained	1,891	768	472	358	236	57
Year1 total donors	6,532	3,988	1,230	786	436	92
Year2 total donors	4,932	2,881	1,007	600	365	79
Percent of Year2 donors by range	100%	58%	20%	12%	7%	2%
Cum. % of Year2 donors - low to high		58%	79%	91%	98%	100%
Cum. % of Year2 donors - high to low		100%	42%	21%	9%	2%
Amount of gifts						
Amount of gift\$ Year2	\$ 1,483,665	\$ 76,791	\$ 102,914	\$ 194,166	\$ 426,659	\$ 683,135
Percent of Year2 gift\$ by range	100%	5%	7%	13%	29%	46%
Cum. % of Year2 gift\$ - low to high		5%	12%	25%	54%	100%
Cum. % of Year2 gift\$ - high to low		100%	95%	88%	75%	46%
Pareto Principle						
Donors % to gifts % - high to low	Pareto 80/20 rule		88% of gifts from		21% of donors	
Cum. % of Year2 donors - high to low		42%	21%	9%	2%	
Cum. % of Year2 gift\$ - high to low		95%	88%	75%	46%	
Donors % to gifts % - low to high	Conversely		12% of gifts from		79% of donors	
Cum. % of Year2 donors - low to high		58%	79%	91%	98%	
Cum. % of Year2 gift\$ - low to high		5%	12%	25%	54%	

27

Understand the sector and know yourself!

- Donor Retention
- Gift Retention
- Upgrades
- Downgrades
- Lapsed Donors
- Recaptured Donors



28

Sign up for
FREE Reports
to see what is
happening in
philanthropy!

1. Sign up at:

www.afpfep.org/reports

Remember - Your most important benchmark of all is your own nonprofit, but you can also compare with others through the FEP Reports.

29

The
Fundraising
Fitness Test
is simple to
use and
FREE at
AFP!

1. Find and use the Fundraising Fitness Test:

www.afpfeop.org/tools

2. Follow the instructions on the site and use the information to compare your organization...to yourself!

Remember - Your most important benchmark of all is your own nonprofit, but you can also compare with others through the FEP Reports.

30

We Are Growing Every Month!

- We are COLLABORATORS!
- We are interested in partnering with YOU!?
- Continuing to Grow Data and Impact to the Nonprofit Sector
- Contact us – Let's Connect!

www.afpfeop.org

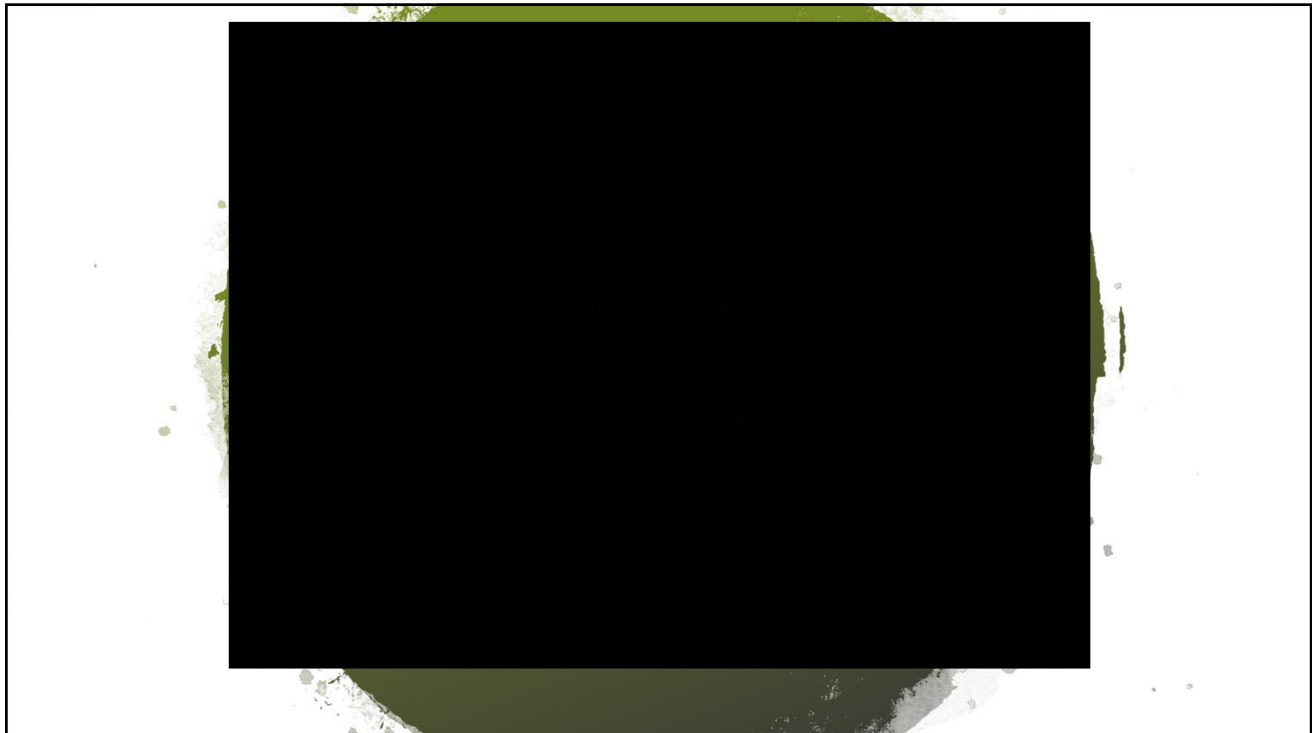


31

FEP Canada Partners



32



33



*Readiness for opportunity
makes for success...*

*Opportunity often comes by
accident,
Readiness never does!*

34



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Thank You!

35