Next River
Fundraising
Strategies

Where the Science and He*art* of Fundraising Converge

Database Audit and Historical Giving Analysis
Sample Audit
2024

Overview and Contents

The following report contains two sections:

- The first analyzes the presence of data within name and contact fields identifying hygiene and quality issues within the data set;

- The second reviews historical giving trends and metrics to evaluate how donors have engaged with and given to your organization. These trends can provide guidance on developing future strategy for fundraising, opportunities for growth, and strengths that can be built upon for continued success.

Observations and recommendations are provided at the end of this report.

These reports are based upon the summary field information provided in your file (First/Last Gift Amount and Counts, Second Gift Amount and Counts, Total Lifetime Giving Amount and Counts, etc.). There are 0 number of records containing a total amount > 0 in the Lifetime Giving Amount field but show 0 in the Lifetime Total Gift Count field. Conversely there are 0 records that show a total count > 0 in the Lifetime Total Gift Count field and $0.00 in the Lifetime Giving Amount field. These records should be reviewed for accuracy and validation.

For any questions, further details, or to arrange for a virtual or in-person review or presentation of this results, please email audits@nextriverfundraising.com

PART 1 – Data Quality and Hygiene
Name, Contact, and Demographic Information

Counts and Categories

Total Record Count: 21,500
Total Number of Donors: 21,500
Total Number of Non-Donors: 0

Donors by Type

"Individual"	"Organization"	"Foundation"
20,000	1,193	307

Contact Information

Name, Address, and Contact Fields
- There are 1,684 records with no recorded address, phone number, or email.
- There are 4,400 records who are not contactable due to a missing name.
- Total number of un-contactable records: 4,561

Summary of Available Contact Information

Demographic	Records with Data
Salutation	0 (0%)
Address	19,381 (90%)
City	18,432 (86%)
State	18,357 (85%)
First Name	17,976 (84%)
Middle Name	4,003 (19%)
Last Name	19,036 (89%)
Organization Name	1,500 (7%)
Zip Code	18,405 (86%)
Likely Valid Zip Code	16,653 (77%)
Phone Number (home, work, or mobile)	19,413 (90%)
Likely Valid Phone Number	17,976 (84%)
Email Address	11,380 (53%)
Likely Valid Email Address	10,564 (49%)

NOTE: This dataset includes 506 records with a phone number listed in an email field and 481 records with an email address listed in a phone number field. An organization name value is often not required for individuals, and the first/middle/last name is often not required for organizations. This report includes all records types, which may potentially explain missing values in those fields for certain records.

This report analyzes the data present within name and demographic fields; it makes no assumptions of quality or accuracy within those fields.

Solicitable Records

Summary of Solicitable vs. Non-Solicitable Records

Record Type	Count	Donors	Revenue
No Name and/or Contact Info	4,561	4,561	$5,719,116
Deceased	0	0	$0
Solicitable Records	16,939	16,939	$13,087,354
Total Records	21,500	21,500	$18,806,470

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Compounding Data Quality Loss

	Total FY1 Donor Records	Total FY1 $ Donated	Avg. Constituent Value	# Uncontactable (for next year)
Current Data	2,293	$685,659	$299	419

	Next Year	2 Years Later	3 Years Later	4 Years Later
Remaining Contactable Donors	1,874	1,781	1,692	1,608
Avg. Constituent Value	$299	$299	$299	$299
Cumulative Uncontactable Donors	419	512	601	685
Dollars Lost	$125,281	$153,088	$179,699	$204,815
Additional 5% Loss (uncontactable next year)	93	89	84	80

How to Read this Report: We use current data to take a "snapshot" of donors from the most recent year and explore what will happen in subsequent years. Using a conservative estimate of 5% for expected annual donor loss after the first year due to name/address change or death, the remaining contactable donors (out of the initial group) decreases each year. If we multiply the total uncontactable donor count by the average amount that a donor gives per year, we can estimate the total dollars lost due to data loss - highlighting the importance of accurate contact information.

Geography

Top 10 States and Zip Codes by Revenue

State	Record Count	Total Revenue
OH	383	$1,433,792
NE	366	$712,233
AK	407	$591,677
DE	397	$559,732
PA	344	$530,892
CT	379	$477,932
NM	334	$402,321
VA	360	$394,221
RI	387	$391,007
SC	402	$390,332

Zip Code (state)	Record Count	Total Revenue
58959 (OH)	1	$653,158
46629 (NE)	1	$443,952
49416 (DE)	1	$350,000
59426 (CT)	1	$350,000
78269 (PA)	1	$350,000
78914 (WA)	1	$175,000
93969 (NM)	1	$175,000
90361 (AK)	1	$144,260
91807 (NJ)	1	$132,433
93212 (LA)	1	$126,810

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Data Quality & Hygiene Summary

Observations & Recommendations
- Confirm consistency in record classification (individual vs. organization, etc.)
- Research, find and confirm contact information for donors with incomplete data or for whom no contact information is available
- Invest in regular data appends to complete and standardize data (National Change of Address, Post Office Standardization, etc.)
- Append missing information as appropriate (phone append, email append, reverse address look-up, etc.)
- Correct blank or missing name information
- Utilize de-duplication processes within the CRM (or invest in record de-duplication services)
- Consider creating a data entry standards manual and data security/privacy policies

PART 2 - Historical Giving Analysis

Results, Metrics, and Trends

TOTALS

- Number of Records: 21,500
- Number of Donor Records: 21,500

- Total Lifetime $: $18,806,470
- Average Lifetime $ per Donor: $875
- Median Lifetime $ per Donor: $125

- Total Lifetime Transaction Count: 180,709
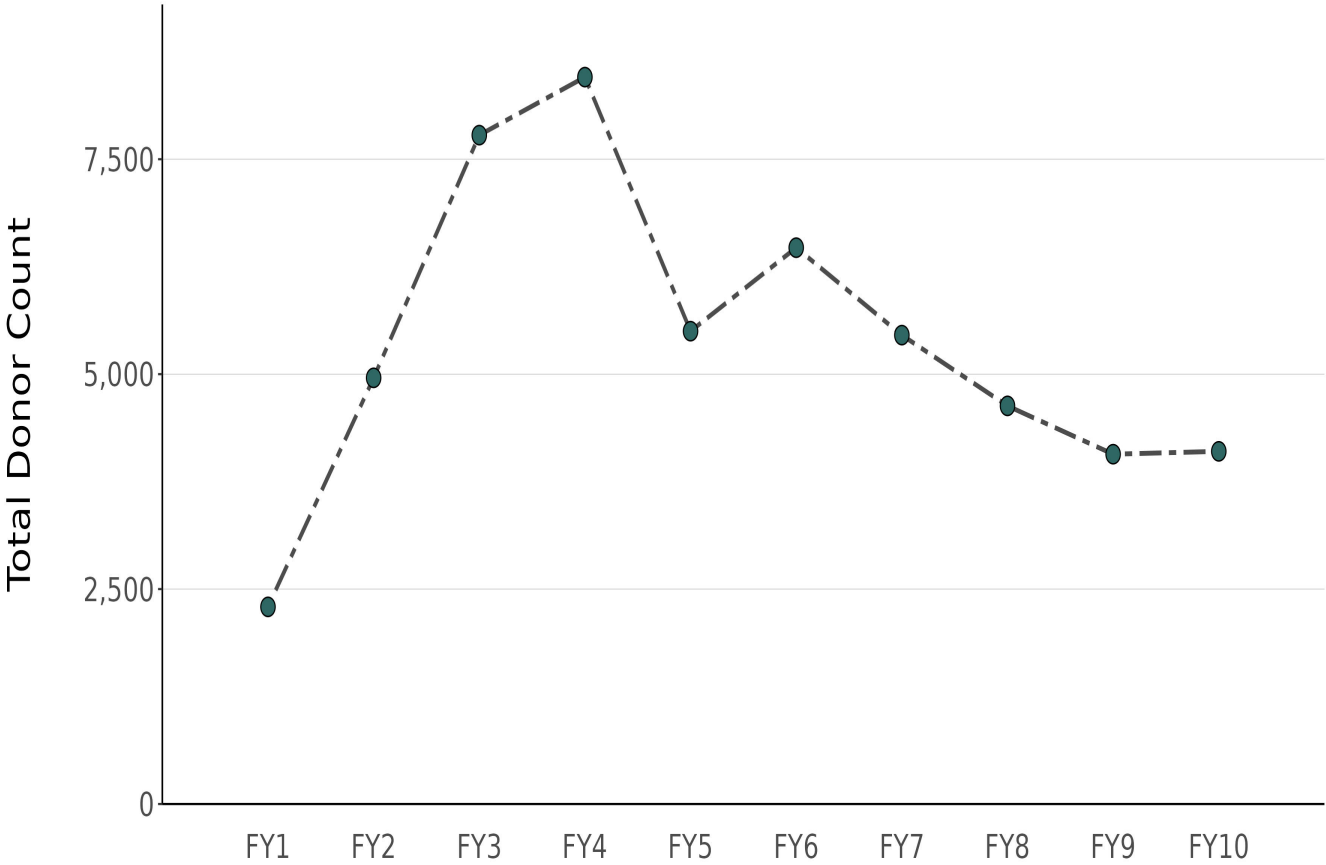- Average Lifetime Transaction Count per Donor: 8
- Median Lifetime Transaction Count per Donor: 3
- Historical Giving Since: 01-03-1995

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Ten Year Giving Summary

Total Revenue by Year

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Total Donors by Year

Y-axis: **Total Donor Count** — 0, 2,500, 5,000, 7,500

X-axis: FY1, FY2, FY3, FY4, FY5, FY6, FY7, FY8, FY9, FY10
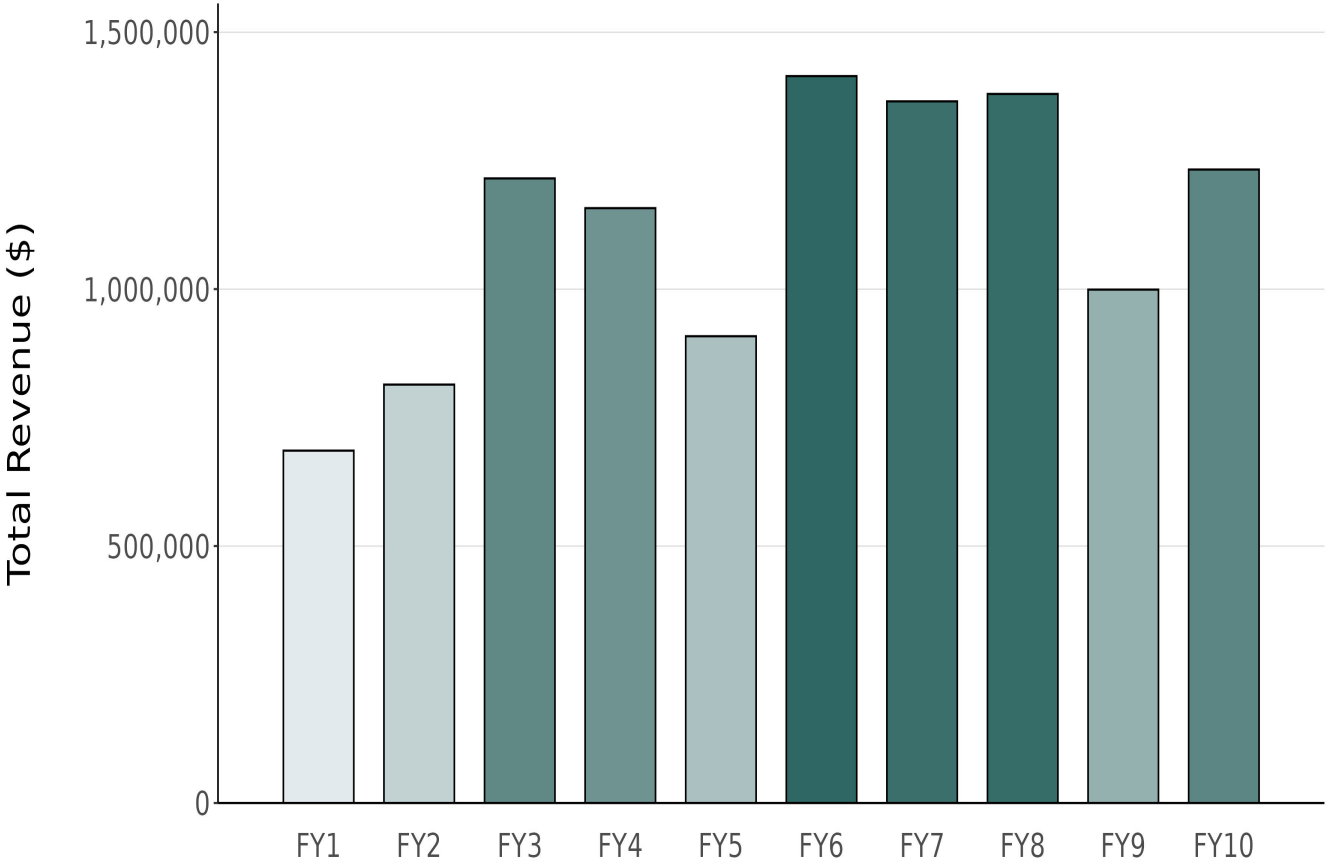
Donor/Gift Metrics by year

	FY1	FY2	FY3	FY4	FY5	FY6	FY7	FY8	FY9	FY10
Total $ Donated	$685,659	$814,176	$1,215,348	$1,157,503	$908,266	$1,414,420	$1,365,287	$1,379,714	$999,019	$1,232,635
Total Gift Count	3,634	7,850	13,087	14,227	9,298	12,219	10,516	8,843	7,664	10,383
Total Unique Donor Count	2,293	4,957	7,780	8,455	5,500	6,471	5,454	4,631	4,069	4,102
Avg. $ per Donor	$299.02	$164.25	$156.21	$136.90	$165.14	$218.58	$250.33	$297.93	$245.52	$300.50
Avg. Gift Count per Donor	1.58	1.58	1.68	1.68	1.69	1.89	1.93	1.91	1.88	2.53
Avg. $ per Gift	$188.68	$103.72	$92.87	$81.36	$97.68	$115.76	$129.83	$156.02	$130.35	$118.72
Median $ per Gift	$50.0	$50.0	$45.0	$45.0	$40.0	$37.5	$35.0	$40.0	$50.0	$50.0
What happened to the previous year's donors?										
Retained Donors Count	1,278	2,909	4,126	3,272	3,234	3,335	2,798	2,570	2,415	
Retention Percentage	25.8%	37.4%	48.8%	59.5%	50%	61.1%	60.4%	63.2%	58.9%	
Non-Renewed Donors Count	3,679	4,871	4,329	2,228	3,237	2,119	1,833	1,499	1,687	
Attrition Percentage	74.2%	62.6%	51.2%	40.5%	50%	38.9%	39.6%	36.8%	41.1%	
Potential $ Lost Due to Attrition	$1,100,104	$800,051	$676,252	$305,017	$534,556	$463,167	$458,851	$446,597	$414,192	
Where did this year's donors come from?										
Renewed Donors Count	1,278	2,909	4,126	3,272	3,234	3,335	2,798	2,570	2,415	
Percentage Renewed	55.7%	58.7%	53%	38.7%	58.8%	51.5%	51.3%	55.5%	59.4%	
New Donors Count	479	1,010	2,745	3,706	1,536	2,436	2,197	1,634	1,654	
Percentage New	20.9%	20.4%	35.3%	43.8%	27.9%	37.6%	40.3%	35.3%	40.6%	
Regained Donors Count	536	1,038	909	1,477	730	700	459	427	0	
Percentage Regained	23.4%	20.9%	11.7%	17.5%	13.3%	10.8%	8.4%	9.2%	0%	

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First Gift/Last Gift Analysis

First Gift Date	Last Gift Date										
	CY 2015	CY 2016	CY 2017	CY 2018	CY 2019	CY 2020	CY 2021	CY 2022	CY 2023	CY 2024	Total
CY 2015	215	59	49	48	31	23	19	33	44	7	**528**
CY 2016		403	128	145	175	117	181	147	150	33	**1,479**
CY 2017			357	237	240	217	273	277	212	45	**1,858**
CY 2018				562	324	288	398	360	275	45	**2,252**
CY 2019					608	230	330	308	174	36	**1,686**
CY 2020						1,480	602	572	220	32	**2,906**
CY 2021							2,242	790	328	38	**3,398**
CY 2022								892	129	26	**1,047**
CY 2023									768	15	**783**
CY 2024										42	**42**
Total	**215**	**462**	**534**	**992**	**1,378**	**2,355**	**4,045**	**3,379**	**2,300**	**319**	**15,979**

How to Read This Report: The left-hand column indicates the year in which a donor made their first gift to the organization. The other columns across the top indicate the year the donor made their last, or most recent, gift. These counts are an indicator of how often donors renew their giving over a longer period of time which is a strong indication of donor loyalty.

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First Gift/Second Gift Analysis

First Gift Date	Second Gift Date										
	CY 2015	CY 2016	CY 2017	CY 2018	CY 2019	CY 2020	CY 2021	CY 2022	CY 2023	CY 2024	Total
CY 2015	16	305									**321**
CY 2016	8	148	679	298							**1,133**
CY 2017				460	876	192					**1,528**
CY 2018						649	1,002	42			**1,693**
CY 2019								1,097			**1,097**
CY 2020								24	1,425		**1,449**
CY 2021									50	1,269	**1,319**
CY 2022										233	**233**
CY 2023										66	**66**
CY 2024										1	**1**
Total	**24**	**453**	**679**	**758**	**876**	**841**	**1,002**	**1,163**	**1,475**	**1,569**	**8,840**

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Frequency and Recency

Frequency and Recency are the highest indicator of likelihood to renew, upgrade giving, or move to major/planned giving.

Summary Metrics by Year of Last Gift

Last Gift Year	Count	Revenue
CY 2015	791	$289,013
CY 2016	990	$194,017
CY 2017	1,066	$468,860
CY 2018	1,382	$175,961
CY 2019	1,762	$390,010
CY 2020	2,681	$218,515
CY 2021	4,463	$353,542
CY 2022	3,906	$613,622
CY 2023	3,092	$631,698
CY 2024	588	$145,490

Those donors whose last gift is within the last five years should be prioritized for renewal/retention. Donors with significant levels of giving prior to the last five years should be reviewed for potential Major Gift renewal.

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Summary Metrics by Lifetime Gift Count

Lifetime Gift Count	Donor Count
1	7,155
2	3,547
3	2,090
4	1,411
5	967
6	765
7	590
8	487
9	419
10	333
11	347
12	229
13	212
14	197
15+	2,751

Lifetime Gift Count	Donor Count
1	7,155
2-4	7,048
5-9	3,228
10-19	2,020
20-99	1,824
100+	225

Revenue Breakdown between Last Gift Date and Lifetime Gift Count

Last Gift Date	Lifetime Gift Count				
	2-4	5-9	10-19	20-99	100+
CY 2020	$125,388	$178,211	$110,198	$186,906	$56,503
CY 2021	$259,072	$185,179	$179,464	$397,339	$133,889
CY 2022	$529,492	$564,314	$282,726	$1,229,693	$417,713
CY 2023	$274,874	$640,572	$1,407,785	$1,362,381	$262,661
CY 2024	$31,051	$104,924	$139,634	$943,598	$470,454

This report analyzes those donors who made more than 1 gift during their time on file and their total lifetime giving.

Last Gift Ranges

Summary Metrics by Last Gift Amount

Last Gift Amount	Count	Revenue
$100,000 - $249,999	1	$100,000
$50,000 - $99,999	4	$200,000
$25,000 - $49,999	12	$406,699
$10,000 - $24,999	48	$666,920
$5,000 - $9,999	42	$216,992
$2,500 - $4,999	59	$171,272
$1,000 - $2,499	278	$341,174
$500 - $999	358	$186,553
$250 - $499	498	$142,950
$100 - $249	4,032	$474,986
$50 - $99	7,537	$411,645
$25 - $49	6,924	$253,788
$1 - $24	1,707	$26,546

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Lifetime Giving Gift Ranges

Summary Metrics by Lifetime Gift Amount

Lifetime Gift Amount	Count	Revenue
$500,000 - $999,999	1	$653,158
$250,000 - $499,999	5	$1,843,952
$100,000 - $249,999	11	$1,530,210
$50,000 - $99,999	25	$1,792,740
$25,000 - $49,999	43	$1,460,210
$10,000 - $24,999	172	$2,620,386
$5,000 - $9,999	248	$1,659,799
$2,500 - $4,999	454	$1,570,034
$1,000 - $2,499	1,394	$2,120,235
$500 - $999	1,758	$1,199,335
$250 - $499	2,752	$940,688
$100 - $249	6,276	$939,248
$50 - $99	5,149	$341,558
$25 - $49	3,097	$132,561
$1 - $24	115	$2,354

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Donor Count Breakdown between Last Gift Date and Lifetime Gift Amount

Lifetime Gift Amount	Last Gift Date				
	CY 2020	CY 2021	CY 2022	CY 2023	CY 2024
$10,000+	5	21	43	67	32
$1,000 - $9,999	126	152	244	439	210
$500 - $999	120	171	266	360	130
$250 - $499	228	395	573	535	89
$100 - $249	674	1,270	1,435	838	94
$50 - $99	658	1,289	924	585	22
$25 - $49	858	1,135	407	258	9
$1 - $24	12	30	14	10	2

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Historical Giving – Upgrade/Downgrade

	FY2 Donors	FY1 Revenue	FY2 Revenue
Downgrade	537	$66,403	$135,441
Same	410	$102,931	$102,931
Upgrade	331	$159,649	$53,652

	FY3 Donors	FY2 Revenue	FY3 Revenue
Downgrade	1,257	$139,516	$319,503
Same	646	$73,648	$73,648
Upgrade	1,006	$178,628	$90,041

	FY4 Donors	FY3 Revenue	FY4 Revenue
Downgrade	1,467	$148,964	$289,796
Same	792	$181,158	$181,158
Upgrade	1,867	$517,000	$240,579

	FY5 Donors	FY4 Revenue	FY5 Revenue
Downgrade	825	$80,956	$150,341
Same	656	$160,962	$160,962
Upgrade	1,791	$370,647	$170,420

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Donor Lifetime Value

	Last Year	2 Years Ago	3 Years Ago	4 Years Ago	5 Years Ago
Total Donations ($)	$685,659	$814,176	$1,215,348	$1,157,503	$908,266
Total Gift Count	3,634	7,850	13,087	14,227	9,298
Total Donor Count	2,293	4,957	7,780	8,455	5,500
Avg. Consecutive Years Retained	1.0	1.3	1.5	1.8	2.3

	Donor Lifespan		Avg. Gift Amount		Gift Frequency (per year)		DLTV
Last 5 Years Donor LTV =	1.7	x	$99.4	x	1.7	=	$287.27
Last 10 Years Donor LTV =	2.2	x	$114.33	x	1.8	=	$452.75

Historical Giving Analysis Summary

Observations & Recommendations
- Identify and segment donors based up strongest indicators of affinity – frequency and consistency of giving, repeat donations/renewals, and increased giving.
- Use these segments to create specific, personalized messages and solicitations that address these donors' loyalty and generosity.
- Target specific messaging to lapsed and long-lapsed donors, prioritizing those with larger gifts or frequency of giving.
- Pay close attention to "consistent but not consecutive" donors (as indicated in First/Last Gift Analysis); target specific messaging acknowledging their giving and loyalty over a long-term period (vs. year-over-year).
- Use recency and frequency of giving to identify donors at lower levels to convert to recurring gifts and/or targeted upgrades.
- Invest in retention strategies and stewardship focused on deepening connection and relationship with those that have indications of most recency and frequency of giving.

Thank you!

If you have any questions about the reports contained in this audit, or would like to schedule time to review in more detail, please contact: hello@nextriverfundraising.com