**Interpreting the FEP Fundraising Fitness Test**

The AFP Fundraising Fitness Test is a free service and the first step to begin an analysis of a nonprofit organization’s fundraising performance and to capture and monitor its own fundraising metrics. Results provided by the Fitness Test include a variety of reports based on only three data elements: Donor identification number, gift date, and gift amount. All donor ID’s are converted to a unique number by the Excel worksheet to protect its identity. (*Go to:* [*http://afpfep.org/Tools*](http://afpfep.org/Tools))

Several Fitness Test reports are available to all participants beginning with the “Top Actionable Indicators” report (see below). In this example, the overall donor retention rate (line 3) is 60% and new donor acquisition rate is 44% (line 6). Further, gifts received were $645,409 (line 20) compared with gifts last year of $486,126 (line 22), a gain of 22% in gift revenue. In addition, this report displays performance in several gift ranges, notably the figures under the $5,000 and up column.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Top Actionable Indicators** | | **FEP Fundraising Fitness Test** | | |  |  |  |
|  |  |  |  |  | **12** | **<-- Year-end month** | |
|  | **Fundraising Performance Indicators** | | |  |  | **Year2:** | **2014** |
|  | **Using Gift Transaction Data By Giving Level/Range** | |  |  |  | **Year1:** | **2013** |
|  |  |  | **------------------------------- Giving Level/Range ------------** | | | | |
| **No.** | **Fundraising Performance Indicator** | **All Donors** | **Under $100** | **$100-$249** | **$250-$999** | **$1,000- $4,999** | **$5,000 & Up** |
| **Donor retention rate** |  |  |  |  |  |  |  |
| 1 | New donor retention rate | **34%** | **21%** | **39%** | **73%** | **63%** | **67%** |
| 2 | Repeat donor retention rate | **76%** | **59%** | **72%** | **86%** | **91%** | **86%** |
| 3 | Overall donor retention rate | **65%** | **42%** | **64%** | **84%** | **89%** | **85%** |
| **Donor acquisition rate** |  |  |  |  |  |  |  |
| 6a | New donor acquisition rate | **38%** | **81%** | **30%** | **9%** | **7%** | **18%** |
| 6b | Repeat donor re-acquisition rate | **16%** | **24%** | **18%** | **8%** | **6%** | **8%** |
| 6 | Overall donor acquisition rate | **54%** | **104%** | **48%** | **17%** | **14%** | **25%** |
| **Donor gains, losses & net** |  |  |  |  |  |  |  |
| 5 | Donor gains | **1,374** | **840** | **375** | **125** | **24** | **10** |
| 7 | Donor losses | **892** | **469** | **282** | **115** | **20** | **6** |
| **9a** | Net gain in donors | **482** | **371** | **93** | **10** | **4** | **4** |
| 12 | Net gain in donors (%) | **35%** | **44%** | **25%** | **8%** | **17%** | **40%** |
| **Number of donors** |  |  |  |  |  |  |  |
| 13 | Overall donors retained | **1,649** | **335** | **503** | **623** | **154** | **34** |
| 16 | Percent of Year2 donors by range | **100%** | **39%** | **29%** | **25%** | **6%** | **1%** |
| **Amount of gifts** |  |  |  |  |  |  |  |
| 18 | Percent of Year2 gift$ by range | **100%** | **4%** | **10%** | **26%** | **23%** | **36%** |
| 19 | Average gift size in Year2 | **$ 325** | **$ 35** | **$ 117** | **$ 345** | **$ 1,277** | **$ 8,000** |
| **Dollar gains, losses & net** |  |  |  |  |  |  |  |
| 20 | Dollar gains | **$ 417,772** | **$ 31,800** | **$ 55,002** | **$ 77,314** | **$ 70,964** | **$ 182,693** |
| 22 | Dollar losses | **$ 404,174** | **$ 18,078** | **$ 39,500** | **$ 56,609** | **$ 60,609** | **$ 229,379** |
| 27 | Net gain in dollars (%) | **3%** | **43%** | **28%** | **27%** | **15%** | **-26%** |
| **Growth in giving (GiG)** |  |  |  |  |  |  |  |
| 39 | Overall rate of growth in gifts | **1%** | **49%** | **18%** | **9%** | **5%** | **-12%** |
| **Growth in donors** |  |  |  |  |  |  |  |
| 43 | Overall rate of growth in donors | **19%** | **46%** | **12%** | **1%** | **2%** | **10%** |
| **Distribution of Year2 donors & gifts:** |  |  |  |  |  |  |  |
| 50 | *Upgraded* donors in Year2 % | **20%** | **9%** | **18%** | **34%** | **35%** | **32%** |
| **What Year1 donors did in Year2** |  |  |  |  |  |  |  |
|  | ***Repeat donors:*** |  |  |  |  |  |  |
| 58 | Year1 donors that *upgraded* % | **24%** | **13%** | **21%** | **35%** | **36%** | **35%** |
|  | **Lapsed donors (attrition):** |  |  |  |  |  |  |
| 66 | *New* Year1 donors that *lapsed* % | **17%** | **37%** | **15%** | **3%** | **3%** | **3%** |
| 68 | *Repeat* Year1 donors that *lapsed* % | **18%** | **22%** | **21%** | **13%** | **8%** | **13%** |

Another standard report from the Fitness Test is the Six Year Trend Analysis (see below) that provides a wealth of details including comparative data for gift revenue, number of donors, number of gifts, monthly donor activity plus a variety of donor statistics to display donor data as reactivated, upgraded, lapsed along with rates of performance for these same categories.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **6 Year Trends** |  | |  |
|  |  | **FEP Fundraising Fitness Test** | |  | **12** | | **<-- Year-end month** |
|  | **Fundraising Income Summary**    **Using Mail, eMail and Website Gift Transaction Data By Giving Level/Range** | | **Year 1** | **2013** | **Year2:** | | **2014** |
|  |  |  |  |  |  |  | |  |
| **Fundraising Performance Indicator** | | **2009** | **2010** | **2011** | **2012** | **2013** | | **2014** |
| 36 | **Total gifts in Year1** | **$412,745** | **$581,152** | **$667,917** | **$818,368** | **$738,495** | | **$967,703** |
| 37 | **Total gifts in Year2** | **$ 581,152** | **$667,917** | **$18,368** | **$738,495** | **$ 967,703** | | **$981,302** |
|  |  |  |  |  |  |  | |  |
| 40 | **Total donors in Year1** | **1,510** | **1,833** | **2,267** | **2,505** | **2,768** | | **2,541** |
| 41 | **Total donors in Year2** | **1,833** | **2,267** | **2,505** | **2,768** | **2,541** | | **3,023** |
| 78c | **Number of gifts in Year2** | **7,615** | **9,046** | **10,314** | **10,962** | **11,207** | | **12,425** |
| 78d | **Average frequency in Year2** | **4.15** | **3.99** | **4.12** | **3.96** | **4.41** | | **4.11** |
| 78e | **Average amount in Year2** | **$76.32** | **$73.84** | **$79.35** | **$67.37** | **$86.35** | | **$78.98** |
|  |  |  |  |  |  |  | |  |
| 72 | **Monthly donors in Year2 \*\*\*\*** | **464** | **541** | **608** | **628** | **657** | | **683** |
| 75 | **Monthly-donor gifts in Year2** | **$204,001** | **$232,587** | **$355,365** | **$353,440** | **$391,405** | | **$431,082** |
| new | **Net change in monthly donors\*** | **n/a** | **117%** | **112%** | **103%** | **105%** | | **104%** |
| 5a | **New donors in Year2** | **877** | **930** | **904** | **1,010** | **658** | | **967** |
| 5b | **Reactivated donors in Year2** | **131** | **223** | **254** | **275** | **311** | | **407** |
| 2a | **Repeat donors in Year2** | **825** | **1,114** | **1,347** | **1,483** | **1,572** | | **1,649** |
| 58a | ***Upgraded in Year2*** | **332** | **492** | **642** | **583** | **688** | | **600** |
| 60a | ***Same in Year2*** | **211** | **273** | **293** | **299** | **385** | | **456** |
| 62a | ***Downgraded in Year2*** | **282** | **349** | **412** | **601** | **499** | | **593** |
| 7 | **Lapsed donors** | **685** | **719** | **920** | **1,022** | **1,196** | | **892** |
| 7a | ***New in Year1*** | **482** | **519** | **605** | **618** | **725** | | **437** |
| 7b | ***Repeat in Year1*** | **203** | **200** | **315** | **404** | **471** | | **455** |
|  |  |  |  |  |  |  | |  |
| 6a | **Acquisition rate\*\*** | **58%** | **51%** | **40%** | **40%** | **24%** | | **38%** |
| 6b | **Reactivation rate\*\* [\*\*\*not yet]** | **9%** | **12%** | **11%** | **11%** | **11%** | | **16%** |
| 64 | **Repeat rate\*\*** | **55%** | **61%** | **59%** | **59%** | **57%** | | **65%** |
| 58 | ***Upgraded\*\**** | **22%** | **27%** | **28%** | **23%** | **25%** | | **24%** |
| 60 | ***Same\*\**** | **14%** | **15%** | **13%** | **12%** | **14%** | | **18%** |
| 62 | ***Downgraded\*\**** | **19%** | **19%** | **18%** | **24%** | **18%** | | **23%** |
| 70 | **Attrition rate\*\*** | **45%** | **39%** | **41%** | **41%** | **43%** | | **35%** |
| 66 | ***New\*\**** | **32%** | **28%** | **27%** | **25%** | **26%** | | **17%** |
| 68 | ***Repeat\*\**** | **13%** | **11%** | **14%** | **16%** | **17%** | | **18%** |
|  |  |  |  |  |  |  | |  |
| 43 | **Net change in total donors** | **21%** | **24%** | **10%** | **10%** | **-8%** | | **19%** |

Other reports from the Fitness Test include Income Summary, Pareto Principle, Gain Loss, Growth in Giving analysis, and more.

To view these report forms, go to: [www.afpfep.org/Tools](http://www.afpfep.org/Tools) and click on “FEP Fundraising Fitness Test (Excel)” under Downloadable files.