**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.

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| **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.

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| --- | --- | --- | --- |
|  | **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.