



Widgets: Making Data Actionable

May 30, 2018

Setting the Stage

- Effective Fundraising Data: What & How To Use webinar ([available here](#))
- What are widgets?
- Where do the formulas come from?

Rubin Singh

One Tenth Consulting



Maria Miranda

Open Books



Donor Retention

Number Of Donors Who
Gave Last Year And Gave
Again This Year






Total Number Of Donors
Last Year

Donor Retention Stats		
Metric	Donors	Revenue
New Donors	54	\$3,372.00
Retained Donors	108	\$649,845.00
Reactivated Donors	66	\$13,650.00
Lapsed Donors	989	\$125,672.43
Recaptured Donors	66	\$13,650.00
Reacquired Donors	9	\$1,370.00

Lapsed Donors

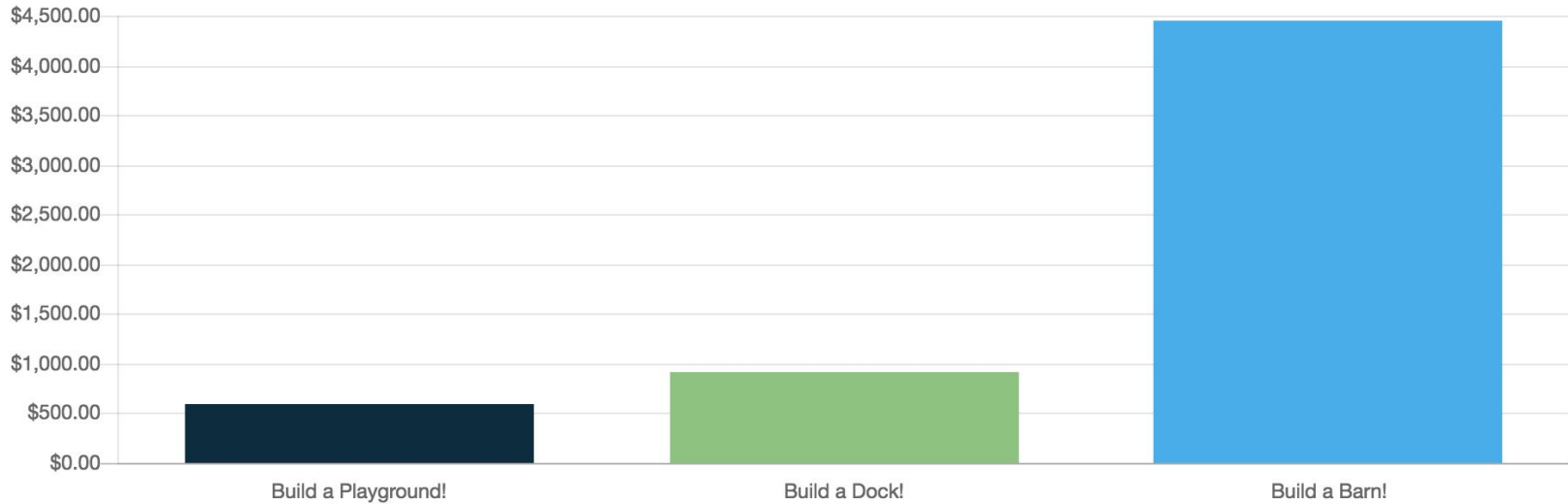
LYBUNT: Last Year But Not This Year

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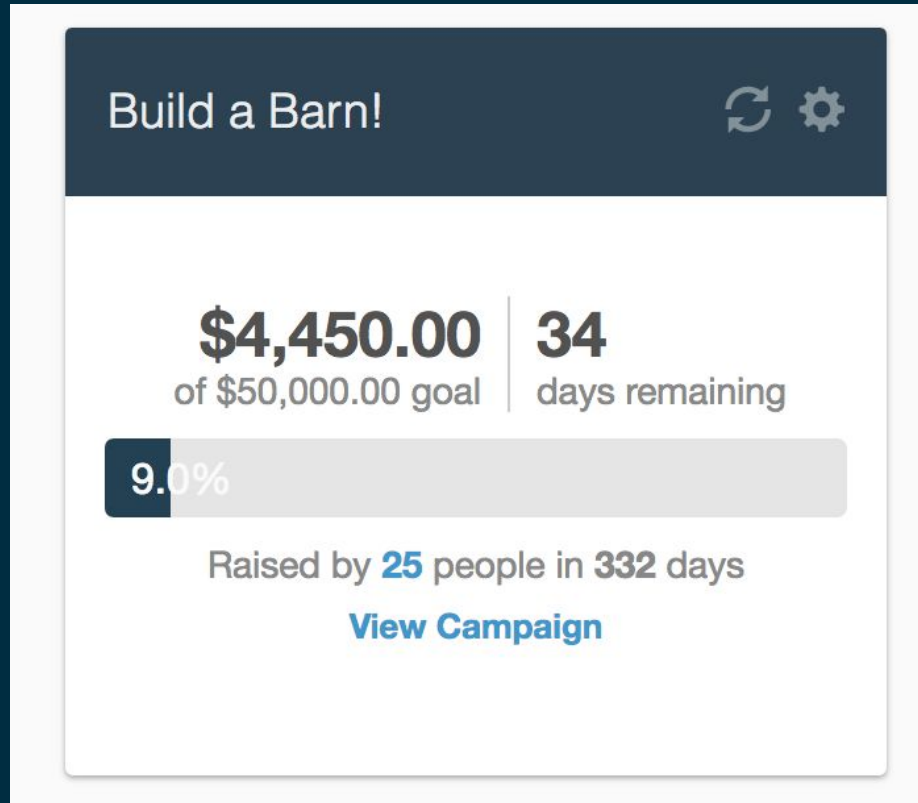


Campaign Widgets

Campaign Comparison Bar Chart



Campaign Widgets



Fundraising KPIs

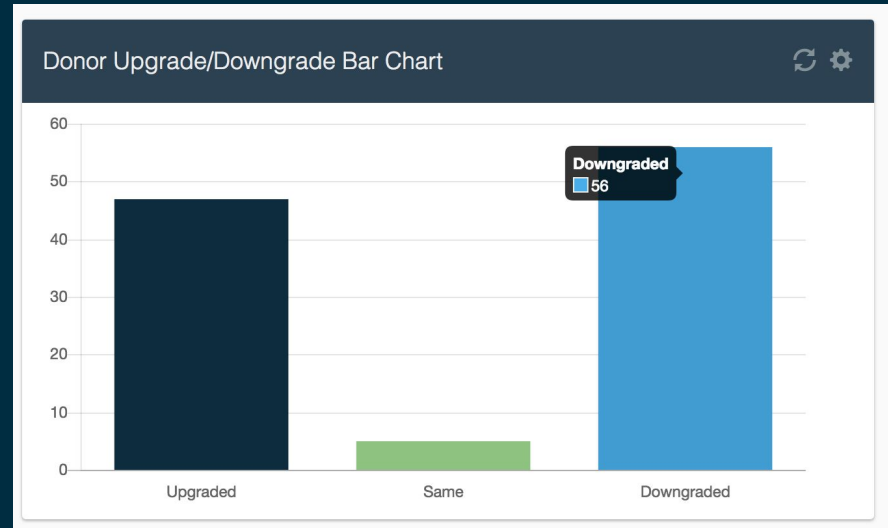
Fundraising KPIs						
Average Annual Giving/Donor ?	Average Gift ?	Donor Retention Rate ?	Donor Attrition Rate ?	Donor Participation Rate ?	Donor Reactivation Rate ?	Donor Recapture Rate ?
\$5,254.27 ↑ \$4,701.35 (850.28%) from \$552.92 in 2016	\$2,313.24 ↑ \$1,927.08 (499.03%) from \$386.16 in 2016	97.73% ↑ 9,281.82% from 1.04% in 2016	2.27% ↓ 97.70% from 98.96% in 2016	95.31% ↑ 999.36% from 8.67% in 2016	93.68% ↑ from 0.00% in 2016	998.86% ↑ 47,845.45% from 2.08% in 2016
Donor Reacquire Rate ?	Donors in Database ?	Donors This Year ?	Estimated Donor Lifetime ?	New Donor Acquisition Rate ?	Rate of Growth in Donors ?	Rate of Growth in Giving ?
1,975.00% ↑ 38,412.50% from 5.13% in 2016	1,067 ↑ 52 (5.12%) from 1,015 in 2016	1,017 ↑ 929 (1,055.68%) from 88 in 2016	44.00 ↑ 42.99 (4,254.17%) from 1.01 in 2016	59.09% ↓ 33.26% from 88.54% in 2016	1,055.68% ↑ 12,768.18% from -8.33% in 2016	10,882.23% ↑ 145,841.36% from -7.47% in 2016

Preparing for the Future

Recurring vs One Time Gifts



Donor Upgrade vs Downgrade





Rubin's Top 5 Widgets

1. Activity List
2. Campaign Comparison Chart
3. Projected Revenue
4. Social Fundraiser Stats
5. Due & OverDue Pledges & Incomplete Transactions

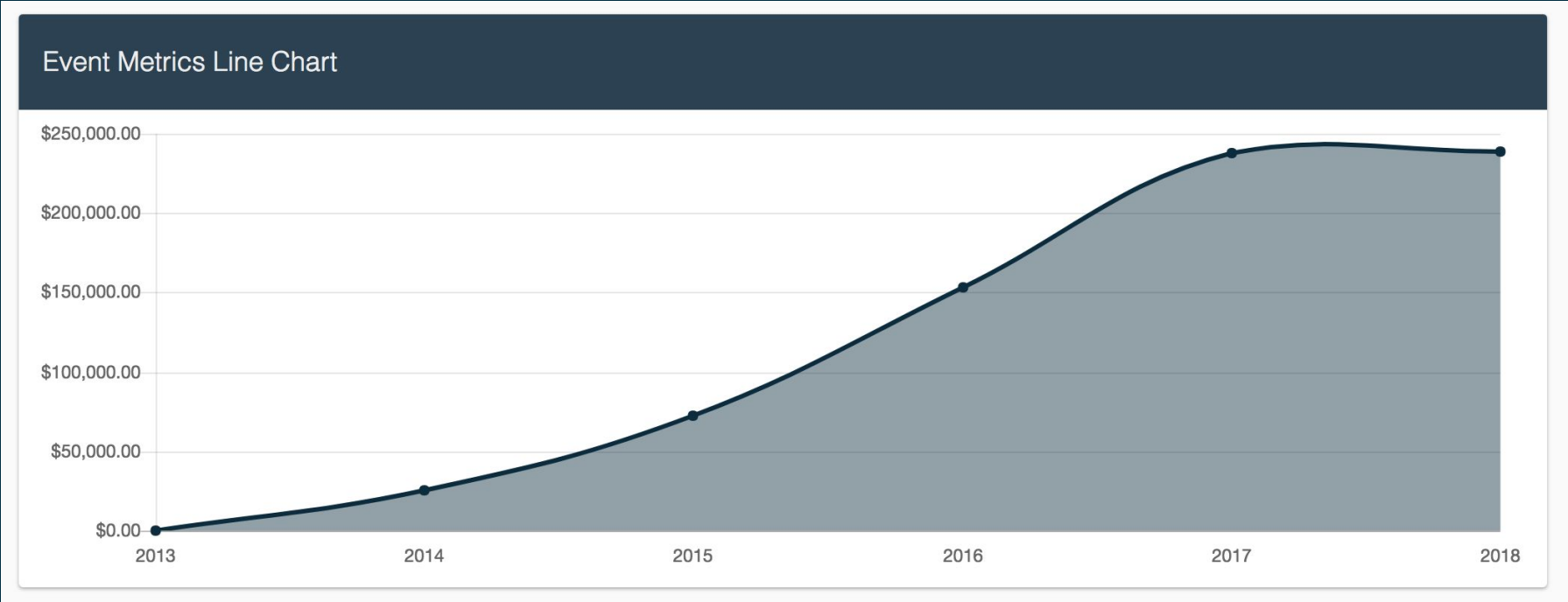
New Widgets!

Events, Reports, Accounts

Accounts

Account Summary  					
	Today	This Week	This Month	This Year	Total
Accounts	0	0	2	4	4,355
Individuals	0	0	2	4	4,195
Organizations	0	0	0	0	160
Households	0	0	1	4	631

Events



Reports

Saved Reports						Search <input type="text"/>		
Report Name	Created	Report Type	Custom Report Type	Publish URL	Actions			
Donations over \$100 this CY	09/22/2017 12:48 p.m.	Donation Detail Report						
Expiring Members Mailing	02/26/2015 10:18 a.m.	Mailing Report			X			
Members who have not attended an event this year	09/22/2017 12:58 p.m.	All Accounts Report						
New Memberships This Month	02/26/2015 10:43 a.m.	Current Member Report		https://neonpro.z2system...	X			
Organization accounts for mailer	09/22/2017 12:46 p.m.	Mailing Report						

6-10 of 14 items [New Report](#) Page 2 of 3



Store, Membership, Communications

Upcoming Webinars

Quickbooks Online with QuickBooks Made Easy

Wednesday, June 13 from 1:00 pm- 2:30 pm

Quickbooks Desktop with QuickBooks Made Easy

Wednesday, June 27, 2018 1:00 pm - 2:30 pm

Register at: <http://www.neoncrm.com/upcoming-webinars>