

Figure A3a. Amount of Gifts Median* Gain/Loss Ratios by Size (total amount raised) – 2012-2013 Within Gain/Loss Category

Gain/Loss Category	Total All Entities	Up to \$100,000	\$100,000-\$250,000	\$250,000-\$500,000	\$500,000-\$1 million	\$1-\$1.5 million	\$1.5-\$2.5 million	\$2.5-\$5 million	\$5 million & up
Gains:									
New	20.6%	32.1%	21.1%	20.5%	16.3%	17.2%	15.5%	15.5%	17.8%
Recapture	8.3%	5.4%	7.5%	9.0%	9.9%	8.6%	10.6%	9.5%	8.1%
Upgrade	14.9%	8.3%	13.2%	15.2%	18.1%	20.9%	19.6%	21.0%	22.0%
All gains combined	54.3%	58.5%	52.7%	53.7%	51.8%	57.4%	59.7%	58.6%	62.9%
Losses:									
Downgrade	-14.1%	-10.2%	-13.1%	-15.4%	-15.5%	-15.8%	-15.7%	-16.3%	-19.9%
Lapsed new	-12.8%	-24.8%	-16.0%	-12.1%	-8.8%	-9.0%	-8.5%	-7.7%	-8.7%
Lapsed repeat	-15.1%	-14.4%	-15.9%	-15.5%	-15.7%	-13.8%	-14.1%	-13.2%	-13.7%
All losses combined	-53.8%	-68.0%	-56.6%	-53.1%	-47.8%	-45.8%	-45.5%	-49.1%	-46.5%
Rate of growth - gifts	4.6%	-2.4%	-0.5%	4.4%	6.7%	11.3%	10.6%	10.5%	13.7%

Figure A3b. Number of Donors Median* Gain/Loss Ratios by Size (total amount raised) – 2012-2013 Within Gain/Loss Category

Gain/Loss Category	Total All Entities	Up to \$100,000	\$100,000-\$250,000	\$250,000-\$500,000	\$500,000-\$1 million	\$1-\$1.5 million	\$1.5-\$2.5 million	\$2.5-\$5 million	\$5 million & up
Gains:									
New	40.6%	47.9%	39.7%	37.5%	39.0%	39.5%	40.4%	39.2%	47.7%
Recapture	13.0%	10.7%	12.1%	13.4%	14.2%	13.3%	15.1%	14.1%	14.2%
All gains combined	55.6%	62.0%	54.0%	53.8%	54.3%	53.2%	55.7%	56.2%	62.9%
Losses:									
Lapsed new	-33.6%	-42.3%	-34.0%	-31.3%	-29.7%	-31.5%	-30.2%	-33.0%	-31.7%
Lapsed repeat	-21.4%	-18.6%	-21.1%	-22.5%	-22.4%	-21.8%	-22.6%	-21.0%	-21.4%
All losses combined	-57.4%	-64.7%	-58.6%	-55.2%	-53.8%	-54.3%	-54.7%	-56.0%	-55.5%
Rate of growth - donors	0.7%	-0.6%	0.0%	1.0%	1.7%	0.0%	1.7%	-0.4%	1.7%

* Median ratios can only be calculated separately for each detailed and summary gain/loss category. Therefore summary ratios do not equal the sum of detailed ratios.

Figure A4a. Amount of Gifts Median* Gain/Loss Ratios by Nonprofit Subsector – 2012-2013 Within Gain/Loss Category

Gain/Loss Category	Total All Entities	Arts Culture Humanities	Education	Environment/ Animals	Health	Human Services	Public/Society Benefit	Religion Related	Other
Gains:									
New	20.6%	15.5%	19.8%	20.7%	24.0%	20.9%	25.7%	14.8%	26.4%
Recapture	8.3%	8.8%	7.9%	10.0%	8.9%	9.5%	7.7%	5.5%	7.8%
Upgrade	14.9%	14.4%	13.7%	17.2%	14.5%	16.0%	13.3%	17.9%	13.2%
All gains combined	54.3%	50.8%	50.8%	55.7%	57.6%	54.5%	56.1%	47.1%	63.8%
Losses:									
Downgrade	-14.1%	-14.8%	-14.8%	-12.6%	-12.9%	-13.8%	-12.1%	-17.1%	-13.9%
Lapsed new	-12.8%	-12.2%	-11.6%	-11.9%	-15.9%	-13.4%	-14.6%	-9.0%	-15.9%
Lapsed repeat	-15.1%	-16.1%	-15.8%	-17.0%	-16.1%	-16.2%	-14.2%	-10.8%	-13.8%
All losses combined	-53.8%	-52.5%	-53.8%	-54.5%	-57.4%	-53.1%	-54.5%	-46.2%	-57.3%
Rate of growth - gifts	4.6%	2.0%	3.4%	8.8%	2.6%	5.5%	4.8%	3.5%	6.2%

Figure A4b. Number of Donors Median* Gain/Loss Ratios by Nonprofit Subsector – 2012-2013 Within Gain/Loss Category

Gain/Loss Category	Total All Entities	Arts Culture Humanities	Education	Environment/ Animals	Health	Human Services	Public/Society Benefit	Religion Related	Other
Gains:									
New	40.6%	36.4%	39.5%	36.5%	42.8%	40.4%	45.2%	35.2%	48.0%
Recapture	13.0%	13.5%	13.7%	14.1%	12.3%	13.4%	12.3%	10.6%	13.2%
All gains combined	55.6%	54.0%	53.9%	50.0%	58.4%	55.4%	60.6%	48.6%	60.3%
Losses:									
Lapsed new	-33.6%	-30.3%	-29.4%	-27.6%	-39.2%	-35.6%	-37.0%	-28.0%	-37.0%
Lapsed repeat	-21.4%	-21.9%	-22.7%	-22.3%	-20.1%	-22.6%	-19.9%	-18.3%	-19.6%
All losses combined	-57.4%	-56.5%	-54.4%	-52.5%	-62.6%	-59.9%	-60.8%	-48.0%	-59.4%
Rate of growth - donors	0.7%	-1.2%	1.0%	1.5%	-1.2%	-1.3%	2.1%	2.0%	3.9%

* Median ratios can only be calculated separately for each detailed and summary gain/loss category.

Figure A5a. Amount of Gifts Median* Gain/Loss Ratios by Region – 2012-2013 Within Gain/Loss Category

Gain/Loss Category	Total All Entities	North-east	NY-Penna	Mid-Atlantic	South-east	Central	North-west	Midwest	South	Moun-tain	Pacific
Gains:											
New	20.6%	21.1%	22.7%	20.9%	20.2%	19.1%	19.2%	18.0%	22.5%	21.2%	20.4%
Recapture	8.3%	9.9%	8.2%	8.5%	7.0%	8.2%	10.1%	9.2%	7.2%	6.7%	8.4%
Upgrade	14.9%	15.8%	14.2%	13.9%	15.1%	15.1%	15.3%	16.4%	16.0%	13.9%	15.0%
All gains combined	54.3%	55.9%	53.7%	52.7%	52.0%	54.6%	53.2%	54.9%	56.7%	52.1%	54.8%
Losses:											
Downgrade	-14.1%	-12.8%	-13.5%	-14.0%	-15.5%	-14.0%	-14.1%	-13.6%	-14.5%	-14.0%	-14.9%
Lapsed new	-12.8%	-14.0%	-13.7%	-15.4%	-13.8%	-11.7%	-11.2%	-11.7%	-14.4%	-12.0%	-12.6%
Lapsed repeat	-15.1%	-15.5%	-16.4%	-14.8%	-15.1%	-14.5%	-14.8%	-15.7%	-14.9%	-15.9%	-15.1%
All losses combined	-53.8%	-49.7%	-55.6%	-56.1%	-53.6%	-52.1%	-50.0%	-51.6%	-55.4%	-54.3%	-55.6%
Rate of growth - gifts	4.6%	10.5%	2.4%	1.7%	3.5%	6.1%	5.6%	6.7%	4.3%	1.6%	4.7%

Figure A5b. Number of Donors Median* Gain/Loss Ratios by Region – 2012-2013 Within Gain/Loss Category

Gain/Loss Category	Total All Entities	North-east	NY-Penna	Mid-Atlantic	South-east	Central	North-west	Midwest	South	Moun-tain	Pacific
Gains:											
New	40.6%	42.0%	40.6%	36.8%	40.0%	40.0%	37.2%	39.7%	45.5%	42.7%	39.8%
Recapture	13.0%	13.5%	12.7%	12.5%	11.9%	14.0%	14.4%	13.2%	11.2%	11.8%	13.7%
All gains combined	55.6%	57.9%	56.7%	54.3%	53.6%	54.9%	51.7%	55.0%	57.9%	56.7%	54.8%
Losses:											
Lapsed new	-33.6%	-31.0%	-35.0%	-36.2%	-38.0%	-30.5%	-31.4%	-31.5%	-39.1%	-34.3%	-31.1%
Lapsed repeat	-21.4%	-20.8%	-21.7%	-21.6%	-21.3%	-22.1%	-23.4%	-21.9%	-18.9%	-21.2%	-21.3%
All losses combined	-57.4%	-55.3%	-60.2%	-61.7%	-60.9%	-54.5%	-54.9%	-55.1%	-59.6%	-57.9%	-55.3%
Rate of growth - donors	0.7%	4.6%	-0.1%	-1.7%	-1.1%	2.2%	-1.9%	-0.6%	1.0%	1.6%	1.0%

* Median ratios can only be calculated separately for each detailed and summary gain/loss category.

Figure A6a. Amount of Gifts Median* Gain/Loss Ratios by Age of Fundraising Program (year fundraising started) – 2012-2013 Within Gain/Loss Category						
Gain/Loss Category	Total All Entities	Up to 5 yrs-2005	6 to 15 yrs-1995	16 to 30 yrs-1980	Over 30 yrs-1979	Unknown
Gains:						
New	20.6%	32.9%	22.8%	18.1%	16.1%	29.0%
Recapture	8.3%	3.9%	7.7%	9.9%	9.3%	8.8%
Upgrade	14.9%	12.4%	15.0%	15.2%	15.8%	13.3%
All gains combined	54.3%	64.1%	54.5%	52.9%	51.5%	67.1%
Losses:						
Downgrade	-14.1%	-13.0%	-14.3%	-13.6%	-14.7%	-14.4%
Lapsed new	-12.8%	-20.2%	-14.6%	-10.9%	-10.9%	-15.8%
Lapsed repeat	-15.1%	-8.5%	-15.1%	-17.6%	-16.5%	-12.4%
All losses combined	-53.8%	-59.6%	-53.7%	-53.0%	-51.4%	-57.4%
Rate of growth - gifts	4.6%	7.2%	3.7%	4.7%	2.8%	9.4%

Figure A6b. Number of Donors Median* Gain/Loss Ratios by Age of Fundraising Program (year fundraising started) – 2012-2013 Within Gain/Loss Category						
Gain/Loss Category	Total All Entities	Up to 5 yrs-2005	6 to 15 yrs-1995	16 to 30 yrs-1980	Over 30 yrs-1979	Unknown
Gains:						
New	40.6%	53.6%	45.3%	35.7%	34.7%	50.6%
Recapture	13.0%	8.4%	12.1%	14.1%	14.2%	13.5%
All gains combined	55.6%	63.0%	59.3%	52.3%	50.0%	66.9%
Losses:						
Lapsed new	-33.6%	-42.3%	-37.5%	-30.9%	-28.1%	-37.0%
Lapsed repeat	-21.4%	-14.6%	-20.3%	-23.4%	-23.2%	-19.1%
All losses combined	-57.4%	-59.9%	-60.9%	-56.1%	-53.7%	-59.6%
Rate of growth - donors	0.7%	6.3%	1.8%	-1.2%	-1.5%	10.0%

* Median ratios can only be calculated separately for each detailed and summary gain/loss category. Therefore summary ratios do not equal the sum of detailed ratios.

Figure A7a. Amount of Gifts Median* Gain/Loss Ratios by <i>Rate of Growth-Gifts</i> – 2012-2013 Within Gain/Loss Category							
Gain/Loss Category	Total All Entities	Minus 30% and Lower	Minus 30% to Minus 10%	Minus 10% to 0%	0% to Plus 15%	Plus 15% to Plus 40%	Plus 40% and Up
Gains:							
New	20.6%	10.7%	14.1%	15.2%	19.4%	25.5%	69.7%
Recapture	8.3%	4.2%	6.8%	9.0%	8.8%	12.9%	14.0%
Upgrade	14.9%	5.7%	10.9%	13.3%	17.1%	22.9%	31.2%
All gains combined	54.3%	25.5%	37.9%	45.5%	53.2%	72.6%	140.6%
Losses:							
Downgrade	-14.1%	-13.6%	-16.3%	-15.9%	-14.1%	-14.0%	-12.0%
Lapsed new	-12.8%	-16.4%	-13.0%	-10.6%	-10.9%	-11.7%	-14.2%
Lapsed repeat	-15.1%	-25.9%	-18.6%	-15.9%	-13.5%	-13.6%	-11.6%
All losses combined	-53.8%	-75.8%	-57.3%	-50.7%	-46.2%	-46.1%	-48.8%
Rate of growth - gifts	4.6%	-46.5%	-19.2%	-4.8%	7.1%	25.2%	83.2%
Figure A7b. Number of Donors Median* Gain/Loss Ratios by <i>Rate of Growth-Gifts</i> – 2012-2013 Within Gain/Loss Category							
Gain/Loss Category	Total All Entities	Minus 30% and Lower	Minus 30% to Minus 10%	Minus 10% to 0%	0% to Plus 15%	Plus 15% to Plus 40%	Plus 40% and Up
Gains:							
New	40.6%	30.6%	34.8%	36.0%	40.3%	42.3%	62.3%
Recapture	13.0%	9.6%	12.2%	13.8%	13.7%	14.1%	14.9%
All gains combined	55.6%	41.6%	48.5%	51.3%	55.8%	58.1%	80.0%
Losses:							
Lapsed new	-33.6%	-39.9%	-33.4%	-31.0%	-30.0%	-31.7%	-35.8%
Lapsed repeat	-21.4%	-24.9%	-23.5%	-22.6%	-20.6%	-21.0%	-17.4%
All losses combined	-57.4%	-68.8%	-59.7%	-55.5%	-51.6%	-53.5%	-54.8%
Rate of growth - donors	0.7%	-20.6%	-7.3%	-2.8%	3.6%	6.5%	25.7%

* Median ratios can only be calculated separately for each detailed and summary gain/loss category. Therefore summary ratios do not equal the sum of detailed ratios.

Figure A8a. Amount of Gifts Median* Gain/Loss Ratios by Percentile Level – 2012-2013 Within Gain/Loss Category						
Gain/Loss Category	All Entities	BOTTOM 20%	20-40%	40-60%	60-80%	TOP 20%
Gains:						
New	20.6%	5.1%	12.2%	20.6%	36.2%	87.9%
Recapture	8.3%	1.0%	4.3%	8.3%	14.5%	31.9%
Upgrade	14.9%	2.8%	9.0%	14.9%	22.6%	43.6%
All gains combined	54.3%	22.7%	39.1%	54.3%	79.1%	150.9%
Losses:						
Downgrade	-14.1%	-31.4%	-19.6%	-14.1%	-9.6%	-3.9%
Lapsed new	-12.8%	-49.2%	-22.7%	-12.8%	-7.5%	-3.2%
Lapsed repeat	-15.1%	-40.6%	-22.5%	-15.1%	-9.1%	-2.0%
All losses combined	-53.8%	-82.6%	-65.8%	-53.8%	-43.8%	-30.9%
Rate of growth - gifts	4.6%	-44.0%	-13.6%	4.6%	26.4%	96.7%
Figure A8b. Number of Donors Median* Gain/Loss Ratios by Percentile Level – 2012-2013 Within Gain/Loss Category						
Gain/Loss Category	All Entities	BOTTOM 20%	20-40%	40-60%	60-80%	TOP 20%
Gains:						
New	40.6%	15.3%	28.5%	40.6%	57.4%	115.8%
Recapture	13.0%	2.7%	8.4%	13.0%	18.0%	29.1%
All gains combined	55.6%	27.4%	42.4%	55.6%	72.6%	133.5%
Losses:						
Lapsed new	-33.6%	-64.6%	-45.4%	-33.6%	-23.7%	-13.7%
Lapsed repeat	-21.4%	-34.7%	-26.1%	-21.4%	-16.2%	-5.3%
All losses combined	-57.4%	-81.3%	-67.2%	-57.4%	-48.0%	-36.1%
Rate of growth - donors	0.7%	-38.2%	-12.2%	0.7%	16.7%	73.8%

* Median ratios can only be calculated separately for each detailed and summary gain/loss category. Therefore summary ratios do not equal the sum of detailed ratios

B. Downloadable Growth-in-Giving Measurement Tools

Two online tools have been developed to help nonprofits measure fundraising gains and losses. Both tools generate fundraising performance reports when you insert gift transaction data into Excel templates provided on the AFP website.

1. **Growth in Giving Reports** can be used to obtain a concise, yet informative picture of fundraising gains and losses-growth in giving and attrition-in simple, reader-friendly format that your executive staff and board members can understand. This includes the Core Growth-in-Giving Report in the same format as in Figure A1 in this FEP annual report. This report is the centerpiece of the FEP gain(loss) reporting package -- along with 6 other Growth-in-Giving Reports that are also useful.
2. **Growth-in-Giving Fundraising Fitness Test** can be used to measure and evaluate your fundraising programs against a set of over 100 performance indicators by five donor giving levels. Performance indicators include: donor retention rates (new donor retention, repeat donor retention and overall donor retention); donor gains, losses and net; dollar gains, losses and net; growth in giving (\$); growth in number of donors; and donor attrition. Gift range categories are \$5,000 & up, \$1,000 to \$4,999, \$250 to \$999, \$100 to 249 and Under \$100.

Instructions for downloading these tools (in Excel format) from the AFP website and for preparing a gift transaction file from your organization's fundraising database can be found at afpnet.org/FEP under **Growth in Giving Measurement Tools**.

Using the "Comparison – FEP Ratios" Worksheet to Find Out How Your Fundraising Performance Measures Up

With the "Comparison – FEP Ratios" worksheet in the Growth-in-Giving Fundraising Fitness Test template, you can compare your results with those of other similar organizations and with your fundraising goals and prior year performance – see Figure B1 -- Comparative Gain/Loss Growth-In-Giving Performance Worksheet.

The "Comparison" worksheet automatically uses the FEP survey data that you submitted to determine your G/L ratio for each gain/loss category by entering your Year-1 data in column "A" and Year-2 data in column "B" for each Gain/Loss category. Your "Gains (Losses)" in column C and "Gain/Loss as a % of Year 1 total" in column D% are computed automatically for you. Thus you automatically know your own Gain/Loss Ratios, also referred to as "Growth-in-Giving Performance Indicators."

Figure B1. Comparative Gain/Loss Growth-in-Giving Performance Worksheet – Year 1 to Year 2

Gain/Loss Category	Year 1 (A)	Year 2 (B)	Gains (Losses) (C=B-A)	-- Growth-in-Giving Performance Indicators --			
				Gain/Loss As % of Year 1 total (D%=C/totA)	Goal, Prior Year or FEP (*) Ratio (E%)	Difference (E-D)	Objective
Gains							
New	0	0	-	0.0%			Improve
Recapture	0	0	-	0.0%			Improve
Upgrade	0	0	-	0.0%			Improve
Subtotal	0	0	-	0.0%			Maximize
Same	0	0	-	0.0%			Upgrade
Losses							
Downgrade	0	0	-	0.0%			Reduce
Lapsed new	0	0	-	0.0%			Reduce
Lapsed repeat	0	0	-	0.0%			Reduce
Subtotal	0	0	-	0.0%			Minimize
Total	0	0	-	0.0%			[Net gain/loss]
				Overall rate of growth			

Strategy for improving performance using the “Comparison – FEP Ratios” worksheet in Figure B1

Step 1. Compare your gain/loss performance to FEP survey statistics(*). For each of the Gain/Loss categories, benchmark your organization’s Gain/Loss Ratios against those of other like organizations entering gain/loss ratios in column E, selecting comparative data from the tables in figures A1-A5 of this report. For example, if your organization:

- Raises \$100,000 to \$249,999 per year, use the ratios in column 2, Figure A2.
- Is in the human services sub-sector, use the ratios in column V, Figure A3.
- Is in the NY-Penna region (USPS region 1), use the ratios in column 2, Figure A4.
- Is less than 5 years old, use the ratios in column 1, Figure A5 (Age).

You can also compare your Gain/Loss Ratios against performance *goals* you have established and/or your *prior year* Gain/Loss Ratios

Step 2. Set your priorities for improvement. For example, establish as your objective moving up to the next performance level in the Percentage Ranking tables (Figures 5 and 6) in each gain/loss category.

Step 3. To achieve your objectives, plan and budget for increased fundraising efforts for priority gain/loss categories.

Step 4. Evaluate progress toward objectives for each gain/loss category.

Repeat the process outlined in this appendix every year.