



# Year-End Performance Recap

2023 Overall Year-End Goal:

2023 Overall Fundraising Total:

## Breakdown of Gifts

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Segment your donor groups to uncover trends in their giving. Write down the number of gifts that came from each group as well as the total amount of donations you received.

### New Donors

MONETARY TOTAL:

NUMBER OF GIFTS:

### Monthly Donors

MONETARY TOTAL:

NUMBER OF GIFTS:

### Annual Fund Donors

MONETARY TOTAL:

NUMBER OF GIFTS:

### Major Gifts Donors

MONETARY TOTAL:

NUMBER OF GIFTS:

### Corporate Donors

MONETARY TOTAL:

NUMBER OF GIFTS:

### Downgraded Donors

MONETARY TOTAL:

NUMBER OF GIFTS:

## Breakdown of Donors

Evaluate the health of your donor base by noting the size of each segment year-over-year. Calculate and note your retention rate in each segment:

**Number of  
2023 donors**



**Number of  
2022 donors**



**100**



**Retention  
Rate**

	2023	2022	RETENTION RATE
<b>New Donors</b>			
<b>Upgraded Donors</b>			
<b>Monthly Donors</b>			
<b>Annual Fund Donors</b>			
<b>Major Gifts Donors</b>			
<b>Corporate Donors</b>			
<b>Downgraded Donors</b>			
<b>Lapsed Donors</b>			

# Opportunities for 2024

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**Based on your totals, identify your top three areas of focus for 2024.** For example, increase the number of monthly donors or reduce the number of downgraded donors.

Not sure? Reference the opportunity segments in GivingDNA for a clearer picture of where your potential lies.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**For higher levels of giving, list some specific areas of opportunity.** For instance:

- » Who were your most significant donors in 2023? How will you steward them in 2024?
- » Who didn't give last year but has given in previous years?
- » Who did you expect to give last year that didn't? What will you do about it in 2024?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



+  
GivingDNA.

**Interested to learn more** about how your organization can super-charge its goals in 2024?

**LET'S CONNECT!**