


It's All in the Numbers
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Agenda

- Introduction
- Learning objectives
- Fundraising philosophy
- Why?
- Donor lifecycle
- Acquisition
- Donor file performance
- Projecting future revenue
- Channel Reports
- Appeal campaigns
- Other analytics

Learning Objectives

- List key performance metrics needed to effectively evaluate your fundraising program.
- Apply strategies to help you dig into the numbers to understand the "reasons why" behind the numbers.
- Identify key donor file health metrics, how they relate to current and future performance.
- Develop an analytics strategy to help you project future revenue potential and the investments required to generate sustained growth.

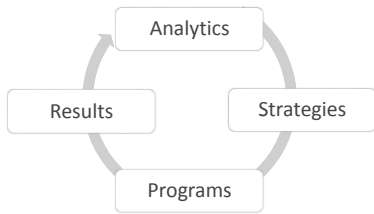
Fundraising Philosophy

Fundraising Philosophy

Fundraising is building relationships with people who have a heart for the work that God has called you to do and connecting with them over their life time to pray, give and engage with you to help fulfill God's vision for your ministry.

Why?

Analytics - Key Planning Process Driver



Why?

- Identifying the “reason why” behind the numbers provides insight into:
 - Problems
 - Opportunities
- Insights lead to strategies and programs to solve problems or leverage opportunities
- Drive results

Determining Why

- Drill down in reports
- Connecting the dots
 - Between reports
 - With marketing and development activities
 - Market factors including:
 - Economic
 - Government
 - Demographic trends

Total Annual Revenue is up \$507,556 (3.6%).

Annual Revenue Summary

	FY2016	FY2017	Diff	% Diff
Total Portfolio	\$9,763,003	\$10,319,727	\$556,724	5.7%
Total Non-Portfolio	\$4,045,075	\$3,370,908	(\$674,168)	-16.7%
Estate Gifts	\$275,000	\$900,000	\$625,000	227.3%
Total Ministry	\$14,083,078	\$14,590,634	\$507,556	3.6%

Portfolio Annual Revenue Summary

	FY2016	FY2017	Diff	% Diff
Top 10 \$10K+	\$2,351,541	\$3,135,889	\$784,348	33.4%
Other \$10K+	\$2,439,939	\$2,414,999	(\$24,940)	-1.0%
Total \$10K+	\$4,791,480	\$5,550,888	\$759,408	15.8%
Mids	\$5,070,022	\$5,237,930	\$167,907	3.3%
Total Portfolio	\$9,763,003	\$10,319,727	\$556,724	5.7%

Non-Portfolio Annual Revenue Summary

	FY2016	FY2017	Diff	% Diff
\$10K+	\$844,677	\$126,191	(\$718,487)	-85.1%
All Other	\$2,348,274	\$2,010,067	(\$338,207)	-14.4%
Non-Portfolio Individuals	\$3,192,951	\$2,136,258	(\$1,056,694)	-33.1%
\$10K+	\$606,000	\$1,051,147	\$445,147	73.5%
All Other	\$246,682	\$183,503	(\$63,179)	-25.6%
Non-Portfolio Org	\$852,124	\$1,234,650	\$382,526	44.9%
Total Non-Portfolio	\$4,045,075	\$3,370,908	(\$674,168)	-16.7%

**You lost \$5,040 on the 25-60 Month Segment
in your last direct mail appeal.**

Monthly Appeal Summary Report

	Mail Qty	Gifts	Revenue	Cost	Net. Rev.	Avg Gift	% Resp.	NYPM	NPR	ROI
New Tier 1-4	9,395	46	\$4,913	\$2,819	\$2,094	\$106.80	0.49%	\$223	\$45.52	1.74
0-12 Tiers 1-8	93,848	2,405	\$225,505	\$28,155	\$197,350	\$93.77	2.56%	\$2,103	\$82.06	8.01
13-24 Tiers 1-3	44,945	385	\$35,266	\$13,483	\$21,783	\$91.60	0.86%	\$485	\$56.58	2.62
25-60 Tiers 1-3	65,500	232	\$15,585	\$20,625	(\$5,040)	\$67.18	0.35%	(\$77)	(\$21.73)	0.76
61-120 Tier 1	32,435	75	\$8,250	\$9,731	(\$1,481)	\$110.00	0.23%	(\$46)	(\$19.74)	0.85
New Names	39,263	19	\$1,308	\$11,779	(\$10,471)	\$68.84	0.05%	(\$267)	(\$551.10)	0.11
Total	285,386	3,162	\$290,827	\$86,592	\$204,235	\$91.98	1.11%	\$716	\$64.59	3.36

Monthly Appeal 25-60 Month Donors

Segment	Tier	Mail Qty	Gifts	Revenue	Cost	Net. Rev.	Avg Gift	% Resp.	NYPM	Cost/Resp	NPR	ROI
25-60	1	19,500	97	\$8,303	\$6,825	\$1,478	\$85.60	0.50%	\$76	\$70	\$53.37	1.22
25-60	2	24,000	80	\$4,629	\$7,200	(\$2,571)	\$57.86	0.33%	(\$107)	\$90	(\$32.14)	0.64
25-60	3	22,000	55	\$2,653	\$6,600	(\$1,359)	\$48.23	0.25%	(\$62)	\$120	(\$27.17)	0.40
25-60	4	4,908	7	\$197	\$1,472	(\$979)	\$28.12	0.14%	(\$199)	\$210	(\$139.91)	0.33
25-60	5	836	1	\$13	\$251	(\$151)	\$12.50	0.12%	(\$181)	\$251	(\$150.80)	0.40
Mail												
Trim												

Total donor annual value is down 2.1%

Total Revenue, Donors and Avg. Value

	Total Revenue				Total Donors				Total Donor Value			
	FY2016	FY2017	Diff	% Diff	FY2016	FY2017	Diff	% Diff	FY2016	FY2017	Diff	% Diff
Total Revenue	\$3,934,524	\$3,855,849	(\$78,674)	-2.0%	22,818	22,832	14	0.1%	\$172,433	\$168,888	(\$3,555)	-2.1%

Total Revenue, Donors and Avg. Value

	Total Revenue				Total Donors				Total Donor Value			
	FY2016	FY2017	Diff	% Diff	FY2016	FY2017	Diff	% Diff	FY2016	FY2017	Diff	% Diff
Total New/Regained	\$596,819	\$732,531	\$135,712	22.7%	7,592	9,088	1,496	19.7%	\$78,611	\$80,611	\$1,999	2.5%
Total Cont/Multi	\$3,337,705	\$3,123,319	(\$214,386)	-6.4%	15,226	13,744	(1,482)	-9.7%	\$219,211	\$227,255	\$8,044	3.7%
Total	\$3,934,524	\$3,855,849	(\$78,674)	-2.0%	22,818	22,832	14	0.1%	\$172,433	\$168,888	(\$3,555)	-2.1%

Total Revenue, Donors and Avg. Value

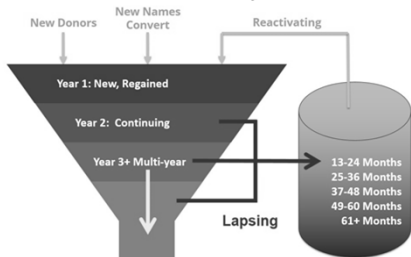
	Total Revenue				Total Donors				Total Donor Value			
	FY2016	FY2017	Diff	% Diff	FY2016	FY2017	Diff	% Diff	FY2016	FY2017	Diff	% Diff
New	\$295,075	\$435,638	\$140,563	47.6%	4,292	6,009	1,717	40.0%	\$68,755	\$72,500	\$3,745	5.5%
Regained	\$301,744	\$296,893	(\$4,851)	-1.6%	3,300	3,079	(221)	-6.7%	\$91,444	\$96,433	\$4,989	5.5%
Total New/Regained	\$596,819	\$732,531	\$135,712	22.7%	7,592	9,088	1,496	19.7%	\$78,611	\$80,611	\$1,999	2.5%
Continuing	\$322,386	\$313,330	(\$9,056)	-2.8%	2,734	2,657	(77)	-2.8%	\$117,921	\$117,921	\$0.00	0.0%
Multi-year	\$3,015,319	\$2,809,989	(\$205,330)	-6.8%	12,492	11,087	(1,405)	-11.2%	\$241,388	\$253,455	\$12,067	5.0%
Total Cont/Multi	\$3,337,705	\$3,123,319	(\$214,386)	-6.4%	15,226	13,744	(1,482)	-9.7%	\$219,211	\$227,255	\$8,044	3.7%
Total	\$3,934,524	\$3,855,849	(\$78,674)	-2.0%	22,818	22,832	14	0.1%	\$172,433	\$168,888	(\$3,555)	-2.1%

Total File Composition

	FY2016		FY2017		Composition % Difference	Donor Value
	Count	% File	Count	% File		
New	4,292	18.8%	6,009	26.3%	39.9%	\$72.50
Regained	3,300	14.5%	3,079	13.5%	-6.8%	\$96.43
Continuing	2,734	12.0%	2,657	11.6%	-2.9%	\$117.92
Multi-year	12,492	54.7%	11,087	48.6%	-11.3%	\$253.45
Total File	22,818	100.0%	22,832	100.0%	0.0%	\$168.88

Donor Lifecycle

Donor Lifecycle



Young Trees Bear Limited Fruit



Mature Trees Bare Much Fruit



Retention Rates Grow Over Time

- The longer a donor is on the file, the higher the retention rate.

Lifecycle	Target Rates
Continuing from New	25%-35%
Continuing from Reactivation	40%-45%
Active 2 Years	55%-60%
Active 3+ Years	75% -80+%

Reactivation Rates Decline Over Time

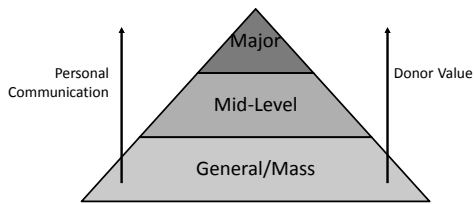
- The longer it has been since a donor has responded, the less like the donor is to reactivate

Lifecycle	Target Rates
Lapsed 13-24	20-25%
Lapsed 25-36	13%-17%
Lapsed 37-48	7%-9%

Donor Value Increases Over Time

- In general, the longer a donor is on the file, the more valuable the donor
 - Growth in Average Gift and Gift Frequency contributes to growth in Donor Value
- Multiple factors affect donor value
 - Donor capacity
 - Donor passion
 - Relationship management

Donor Relationship Management



Donor Lifecycle Define Key Segments in Performance Trends

- New Donors
- Reactivated Donors
- Continuing (2nd Year) from New or Reactivated
- Multi-year donors
