

# Donor Dashboard

The most helpful dashboards include only the most critical data to guide assessment and decision making. We recommend including the following. Doing better in each of the first three areas listed means you're raising more money! You may still want to include the fourth category — total dollars raised — since that's what most board members are accustomed to review. At the same time, you can use your dashboard as a means of educating your board about other important indicators.

## Median gift

*Take the middle number in the sequential list of all of your donations.*

Goal\*: \$ \_\_\_\_\_  
This year: \$ \_\_\_\_\_  
Last year: \$ \_\_\_\_\_  
Prior year: \$ \_\_\_\_\_

## New donors

*Indicate the number of donors who have given.*

Goal\*: \$ \_\_\_\_\_  
This year: \$ \_\_\_\_\_  
Last year: \$ \_\_\_\_\_  
Prior year: \$ \_\_\_\_\_

## Retention rate

*Note the percentage of donors in the year who also gave in the preceding year.*

Goal\*: \_\_\_\_\_ %  
This year: \_\_\_\_\_ %  
Last year: \_\_\_\_\_ %  
Prior year: \_\_\_\_\_ %

## Total dollars raised

*List the total funds raised. (Consider whether to include funds pledged and remember not to double count these amounts year over year.)*

Goal\*: \_\_\_\_\_ %  
This year: \_\_\_\_\_ %  
Last year: \_\_\_\_\_ %  
Prior year: \_\_\_\_\_ %

Depending on the scope of your development program, you may also choose to track other metrics. In addition, you may choose to expand this dashboard to include more years for comparison, and/or may use three numbers — acceptable/goal/ideal — in place of a single goal point.

\* For each performance area, make goals that challenge you while not being unrealistic. After careful consideration of past performance, remember to update your goals each year and update your plan accordingly.