Donor Pipeline Assessment Process

1. Start in your database and select any donor who gave $1 or more in any of the last **four** full calendar years (or three full years + this YTD). That is four years before the date you are doing the analysis. So, if you are doing the analysis in 2024, you would go to 2020 and select any donor who has given at least one dollar in all the years from 2020 forward to 2024, *including* YTD 2024. This is the pool you will be analyzing (this may be a lot of donors if you are working with a large database).

2. For each donor, export into a spreadsheet cumulative giving totals for each of the past four years and current YTD, along with their Donor ID or any other identifying factors you will find useful.

3. In the first column of a new worksheet, create a list of cumulative giving categories. We recommend the following categories, but feel free to adjust if there are other giving points that are particularly relevant to your organization:

    a. 0-24.99
    b. 25 - 49.99
    c. 50 - 74.99
    d. 75 - 99.99
    e. 100 - 249.99
    f. 250 - 499.99
    g. 500 - 999.99
    h. 1000 - 4999
    i. 5000 - 9999
    j. 10000 - 24999
    k. 25000 - 49999
    l. 50000 - 99999
    m. 100000 - 249999
    n. 250000 - 499999
    o. 500000 - 999999
    p. 1 Million +

4. Using the donor data you exported, calculate three different numbers for each year starting with 2020:

   a. Total number of donors giving in each giving category during the year
   b. Grand total amount for all donors giving in each giving category during the year
   c. Average gift for all donors giving in each giving category during the year
5. Do the calculations in step 4 for all subsequent giving years including YTD 2024.
6. If you lay these calculations side by side in a worksheet, you should be able to see patterns that help you assess the health of your donor pipeline.

You may notice areas of opportunities, where the pipeline is “clogged” with a lot of donors. You may also notice areas of scarcity, where attention is needed to grow that area of the pipeline.