

Contribution Renewals Report

Introduction

The **Contribution Renewals Report** is designed to give you a quick look at the number and rate of renewed donors for multiple time periods. Organizations strive to have a healthy renewal rate. A suggested target renewal rate is 66 percent of the donors each year. This report provides that information at a glance.

The reporting interval for defaults to 12 months, but can be changed. The duration of time to include a donation as a renewal defaults to 12 months, but it can be changed. Some groups consider a renewal any amount that comes in within 18 months after the latest contribution. Results can be displayed as a list or as a bar chart. The report will also provide these subtotals for each time period selected:

- Total Amount Contributed
- Total Number of Contributions
- Average Value of Contribution
- Largest Contribution
- Smallest Contribution

Preparing to Run the Report

The **Contribution Renewals Report** is one of the Contribution Reports Templates available off of the **Reports>Contribution Reports** menu's **New Contribution Report** button. It will be available as a template only after two software extensions have been enabled on your site. If it's not there, you'll have to install the software extensions. It's outside the scope of this document to describe installing the software extensions, so see your PowerBase administrator or reach out to PowerBase Support for assistance installing them.

This is an easy report to create, you can accept the defaults and click preview report to see the results, but if you've never created a report, you might find it helpful to review the **Creating Reports – Basics** document before proceeding. This document will assume that you are familiar with the basic report creation process in PowerBase.


Contribution Renewals Report

Setting Filters

Contribution Renewals Report - Template

▼ Report Criteria

Set Filters

Cut-off date	Is equal to ▼	12/31/2012  (clear)
Contribution Time Interval	Is equal to ▼	12
Renewal timeframe	Is equal to ▼	12
Number of periods to show	Is equal to ▼	4 ▼
Contribution Status	Is one of ▼	Completed Pending Cancelled Failed
Financial Type	Is one of ▼	Campaign Contribution Donation Event Fee Member Dues
Payment Type	Is one of ▼	Credit Card Debit Card Cash Check
Contribution Amount	Is less than or equal to ▼	
Campaign	Is one of ▼	Fundraising Campaign Lead Poisoning Abatement Middlefield Issues C4 Take Back the American Dream 2011
Tag	Is one of ▼	Follow Up
Group	Is one of ▼	_Immigrant rights interest in 44505 FR All Donors 2012 FR Donor Solicitors FR Donors

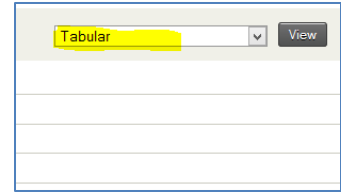
Preview Report

Filter Setting	Description
Cut-off date	This is date is the date of the last interval included in the report. Defaults to the end of the prior year.
Contribution Time Interval	The Interval of reporting cutoff dates. 12 months will show results every year.
Renewal timeframe	Length of time following an initial donation in which another donation must be made to be considered a renewal
Number of periods to show	Number of intervals where a counts and rates will be captured
Contribution Status	Defaults to "Completed". No need to change this in most situations.
Financial Type	Pick the Financial Types that are significant as donations. Exclude merchandise, event fees and other unrelated income. If you don't pick any, all will be included.
Payment Type	In most cases, there is no need to pick any of these. If none is selected, then all Payment types will be included.
Contribution Amount	If you have a reason to filter for donation size, this is the place to set the donation size and the rules you would like to apply.
Campaign	Defaults to all Campaigns
Tag	Defaults to all Tags, if none is selected
Group	Defaults to every contact, if no group is selected.

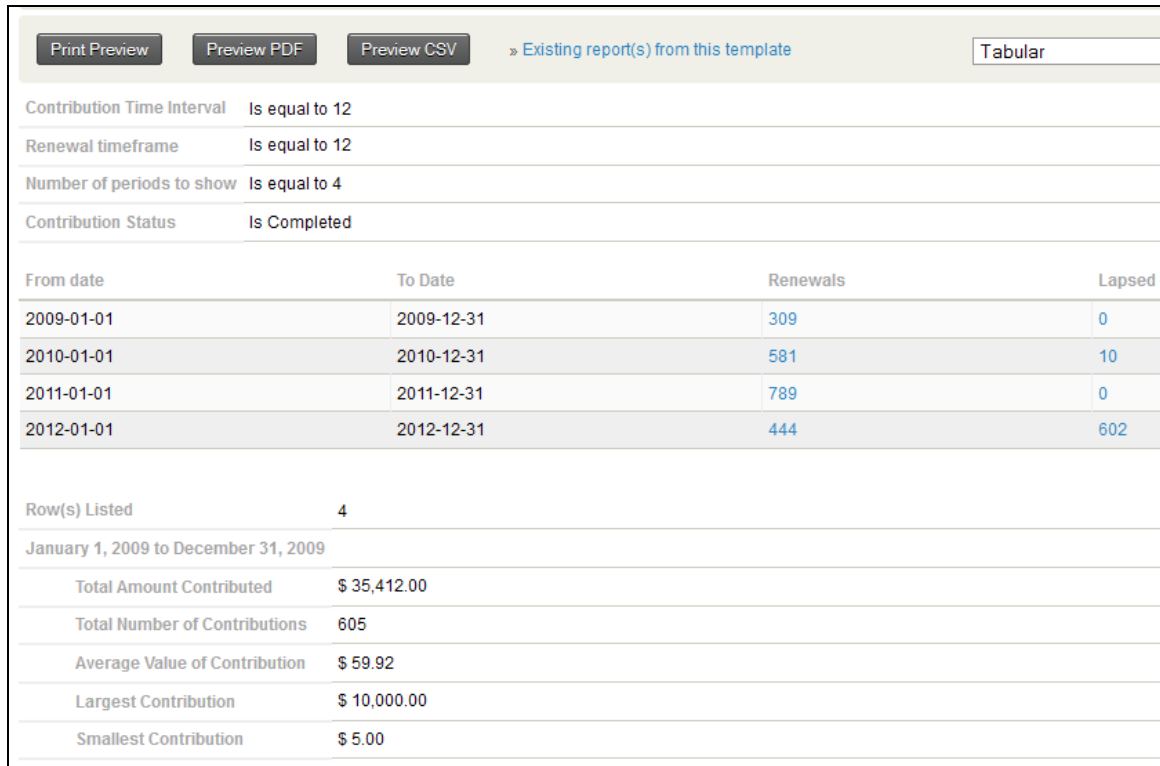
Contribution Renewals Report

Preview Report

Click on Preview Report to bring the results up. The initial results will be in Tabular form, but you can change it.



A screenshot of a web interface showing a dropdown menu with 'Tabular' selected and a 'View' button next to it. Below the dropdown are several empty rows, suggesting a list of options or a table.



A screenshot of a report interface. At the top, there are buttons for 'Print Preview', 'Preview PDF', and 'Preview CSV', followed by a link '» Existing report(s) from this template' and a dropdown menu set to 'Tabular'. Below this is a table of filters:

Contribution Time Interval	Is equal to 12
Renewal timeframe	Is equal to 12
Number of periods to show	Is equal to 4
Contribution Status	Is Completed

Below the filters is a table with columns: From date, To Date, Renewals, and Lapsed.

From date	To Date	Renewals	Lapsed
2009-01-01	2009-12-31	309	0
2010-01-01	2010-12-31	581	10
2011-01-01	2011-12-31	789	0
2012-01-01	2012-12-31	444	602

Below the table, it says 'Row(s) Listed 4' and 'January 1, 2009 to December 31, 2009'. At the bottom is a summary table:

Total Amount Contributed	\$ 35,412.00
Total Number of Contributions	605
Average Value of Contribution	\$ 59.92
Largest Contribution	\$ 10,000.00
Smallest Contribution	\$ 5.00

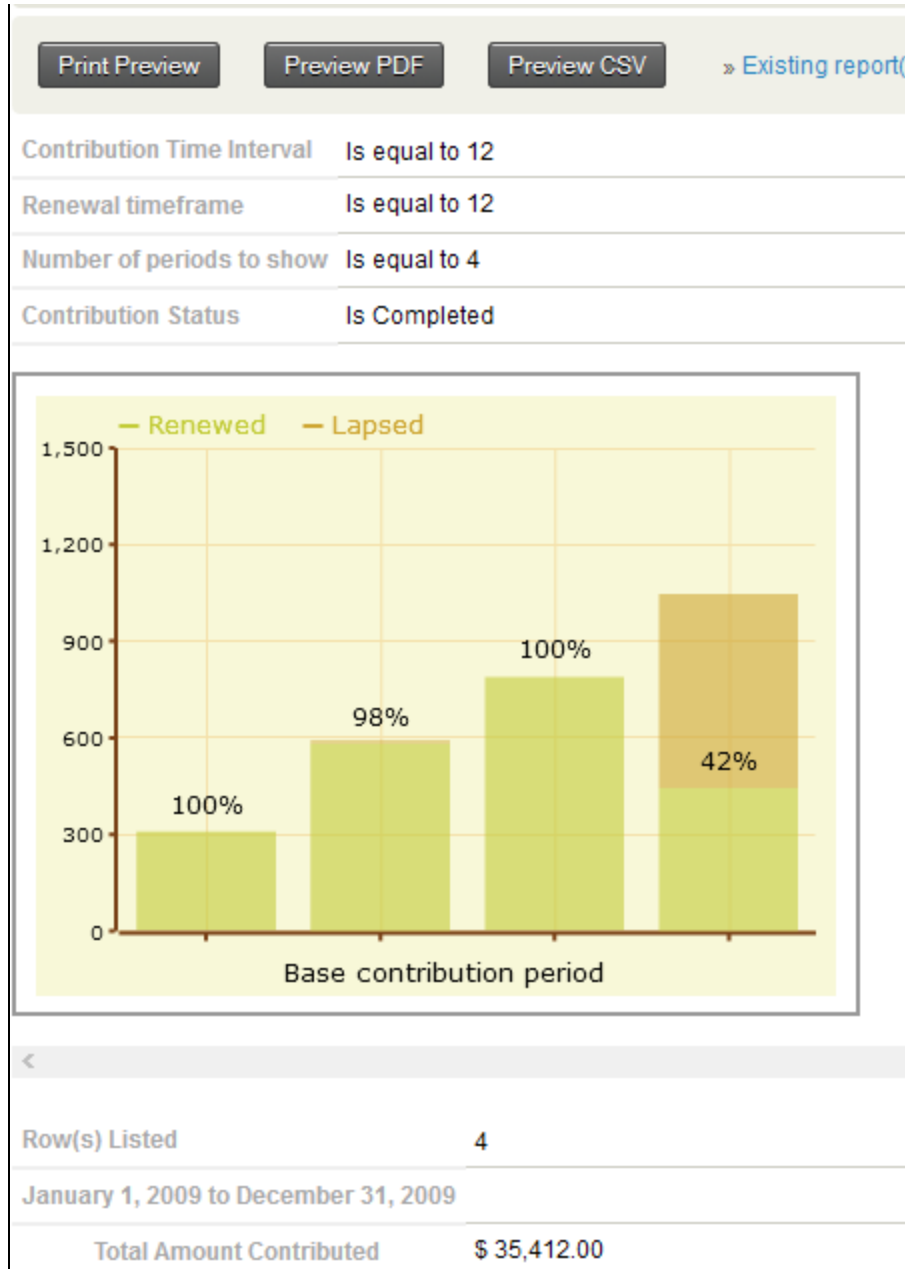
You can drill down by clicking on the numbers in blue. This will bring up the **Donor Behaviour Detail Report** showing the supporting details. The **Donor Behaviour Detail Report** is described in a separate document.

Bar Chart

To change it to a Bar Chart Report, change the View field from “Tabular” to “Bar Chart” and click View.

The result will be something like this next screenshot.

Contribution Renewals Report



Dashboard

Once you preview your report, you have the option of saving it and, optionally, to make it available for a Home page Dashboard. Details of that process are explained in the **Creating Reports – Basics** document referred to above.

This is how the bar chart would appear on the dashboard. Remember that you will have to occasionally update the period end date to keep it current.

Contribution Renewals Report

