Contributor Recovery Report

Introduction

The **Contributor Recovery Report** is designed to give you a quick look at the number and rate of recovered donors in two time periods. Lapsed donors are a potential source of new donations and recovering them as current donors is a measure of the success of fundraising effort. This report provides that information at a glance.

The reporting interval for defaults to 12 months, but can changed. The duration of time to include a donation as a recovered defaults to 12 months, but it can be changed. Not all historical donations need to be included in the calculation: by default this is limited to 60 months. Results can be displayed as a list, a bar chart or as two pie charts. 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 **Contributor Recovery 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.

Setting Filters

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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	Period during which another donation must be made to be considered a renewal. If a donor has made a prior contribution and this period of time expires afterwards without another donation, the donor is considered to be lapsed. Donors who subsequently make a donation after this length of time are classified as Recovered Donors.
Number of months to look back	Limits the period of time that will be included in the calculation. Use it to tell the software to only include relatively recent donations. If too much time has passed since a donor contributed, it's probably better to think of them as a new donor. This should be set to your organization's standard. For example, some organizations only try to recover lapsed donors who gave in the last three years.
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.

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Preview Report

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

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.

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Pie Charts

To change it to a Pie Chart Report, change the View field "Pie Chart" and click View. The result will be something like this next screenshot.
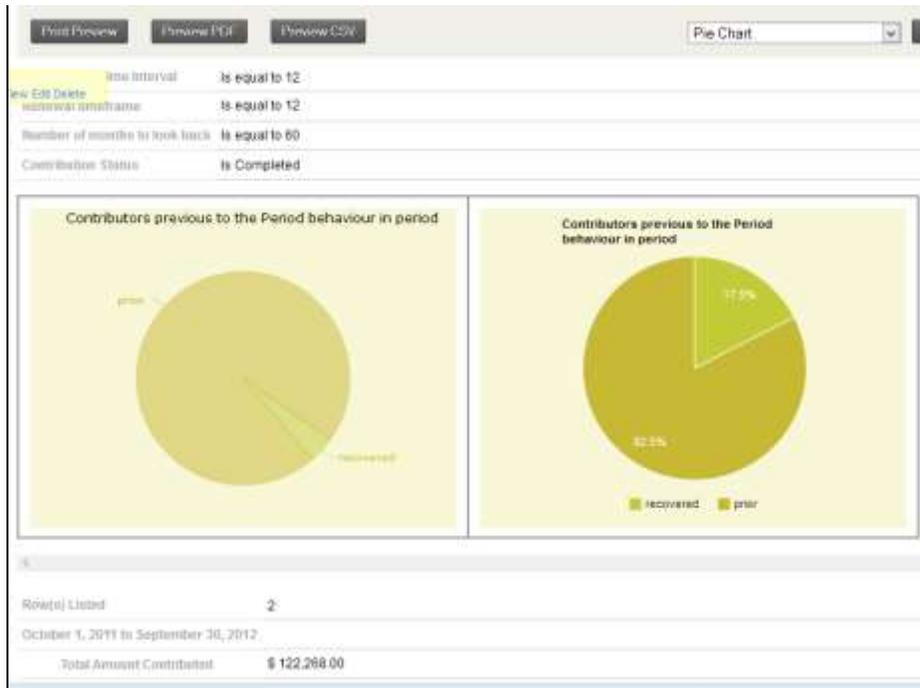
Dashboard

One 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.

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