Key Numbers Report

Introduction

The **PowerBase Key Numbers Report** is designed to give you a quick look at the state of your fundraising and database growth rate. It gives you comparative year over year (or other time period) results for fields like these:

- Total Number of Donors
- Total Number of Individual Donors
- Total Number of Organization Donors
- Amount Raised
- Amount Raised From Individuals
- Amount Raised From Organizations
- Average Donation
- Average Donation From Individuals
- Average Donation From Organizations
- Donors who Increased their donation
- Individual Donors who Increased their donation
- Organization Donors who Increased their donation
- Active Pledges
- Active Recurring Contributions
- Sustaining Members
- Largest Donation
- Largest Donation From Individuals
- Largest Donation From Organizations
- Smallest Donation
- Smallest Donation From Individuals
- Smallest Donation From Organizations
- New Contacts in Database
- New Individuals in Database
- New Organizations in Database

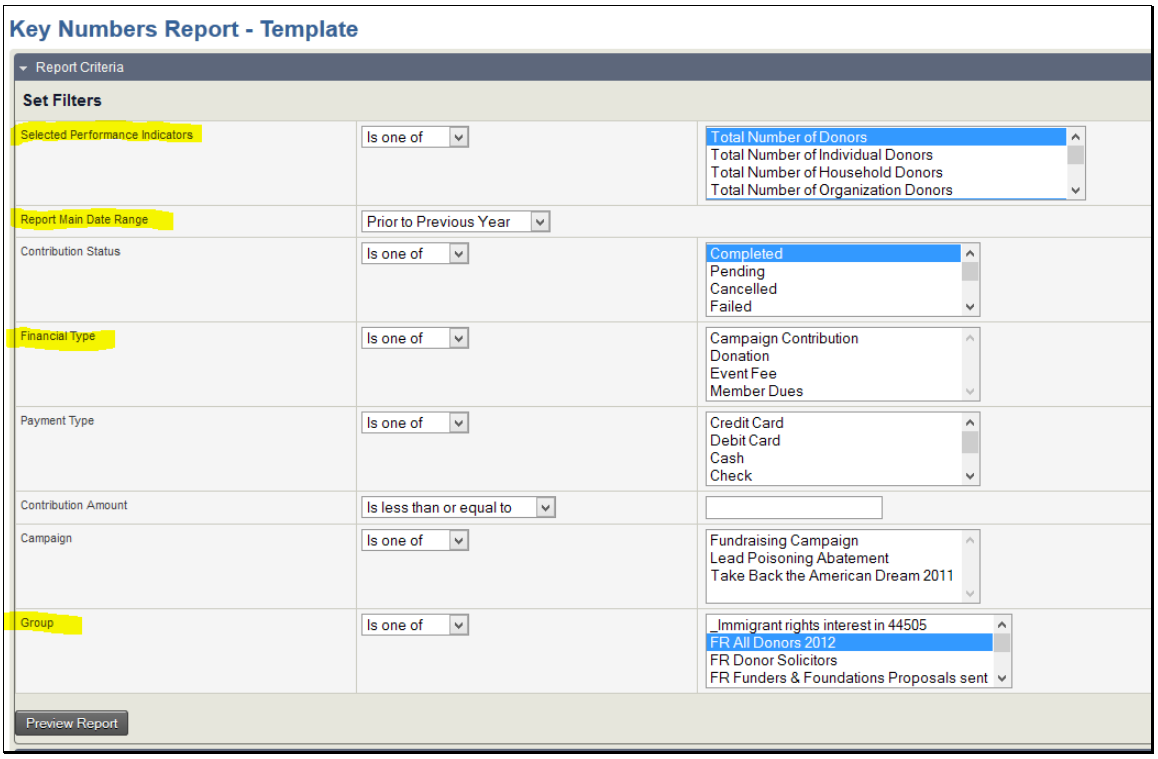
Preparing to Run the Report

The **PowerBase Key Numbers 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.

Key Numbers Report

This is an easy report to create, 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



The important parameters to set with filters are the performance indicators, the time frame, and the financial types to be included in the report.

Performance Indicators are set of numbers that mostly analyze fundraising information, with one exception – the change in count of contacts in PowerBase. Most can be broken out by Individual, Organization and Household (if it's in use).

The time frame is usually comparing year-to-date again last-year-to-date, but any time period can be selected.

Financial types filtering allows you to exclude merchandise, event fees or other unrelated income from the totals.

Of the remaining filters, the group filter is especially useful for selecting a subset of donors or members in your PowerBase. In this way you can have a report that specifically covers how the individual donor campaign is proceeding, for instance.

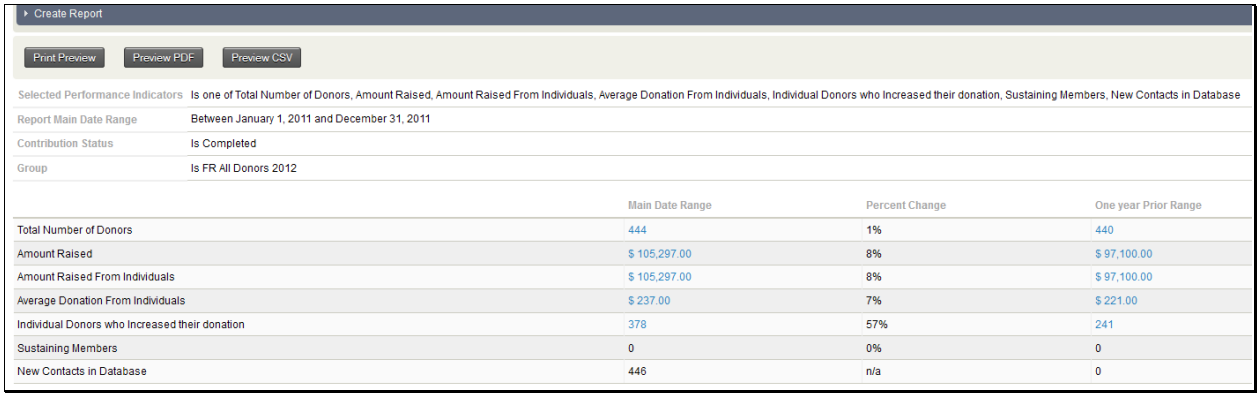
The change in count in the database is not affected by filtering for a group or financial type.

Key Numbers Report

Note: You select additional parameters or deselect a parameter by using the Ctrl key and clicking on the item.

Preview Report

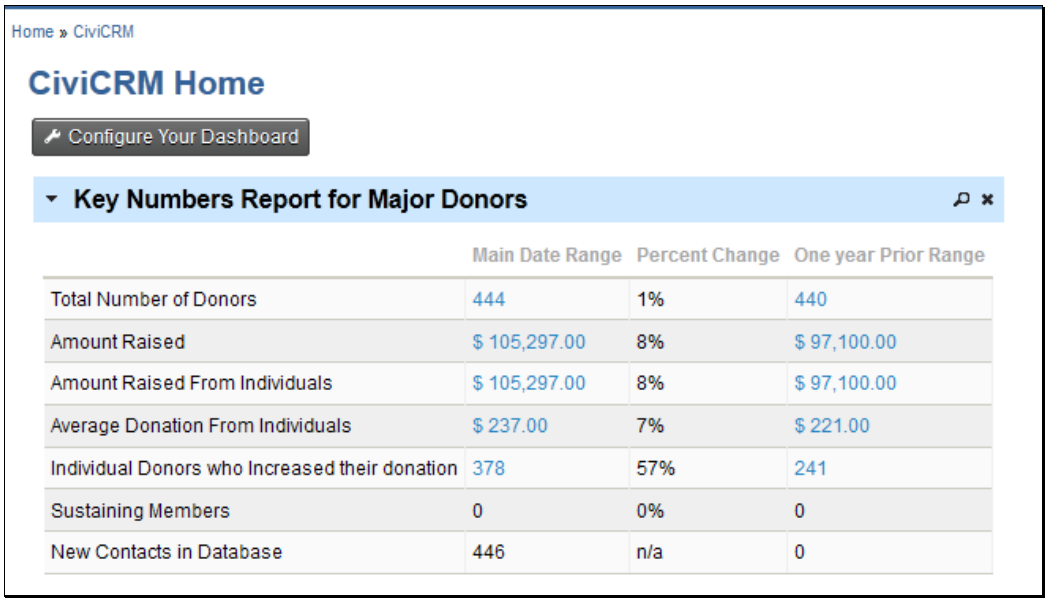
Click on Preview Report to bring the results up.



	Main Date Range	Percent Change	One year Prior Range
Total Number of Donors	444	1%	440
Amount Raised	$ 105,297.00	8%	$ 97,100.00
Amount Raised From Individuals	$ 105,297.00	8%	$ 97,100.00
Average Donation From Individuals	$ 237.00	7%	$ 221.00
Individual Donors who Increased their donation	378	57%	241
Sustaining Members	0	0%	0
New Contacts in Database	446	n/a	0

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.

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.



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This is how the report appears on the Home page Dashboard.