

# Vital Data Management DONOR FILE AUDIT

A Thorough Statistical Analysis  
of Your Annual Giving Program

## Ask Yourself ...

*How well do you understand your donors?*

It's not a simple question. After all, truly understanding your donors means knowing their frequency of giving, their motivations for giving, why they're giving more (or less) than last year, the types of appeals they respond to and much more. And you need these details across each of your donor segments.

If you have an in-depth understanding of your donor/member base, you can make better-informed decisions about your direct mail strategy. But if you lack this kind of insight, then you're flying blind.

## Our Solution: Donor File Audit

At Vital Data Management, we recommend that every nonprofit organization conduct a donor file audit at regular intervals. The following reports comprise the basis for a thorough statistical analysis of your annual giving program.

- **Gift analysis by dollar range:** the number of gifts received in a year within various dollar ranges and the sum of those gifts; a valuable tool for identifying giving patterns
- **High-level gift analysis:** provides further analysis of the giving patterns of high-end donors
- **Most-recent gift analysis:** helps determine segmentation strategies, estimate mailing material quantities and guide the removal of lapsed donors from your file
- **Donor upgrade/downgrade analysis:** a barometer to measure the effectiveness of donor relations activities
- **Donor renewal by year of acquisition:** tracks retention of newly acquired donors from the first gift to the present; an excellent indicator of revenue and donor retention trends

Once we have completed your donor file audit, we present and deliver a comprehensive report, including our recommendations for applying the findings to your direct mail strategy.

## Key Benefits

A VDM donor file audit will help you:

- Track annual giving patterns among donors and members.
- Identify program strengths and weaknesses.



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- Gather information critical to planning.
- Launch significant campaigns with confidence.
- Build lasting relationships with donors.

**The end result:** Gaining deeper insight into your donor base will allow you to refine your direct mail program to invest in those donors who generate the greatest return.

### Get Started Today

Want to learn more about how a VDM donor file audit can help improve your fundraising success? Please call us at 339-203-4290 or 888-624-5836. You may also email the following individuals:

- John Betz, principal: [jbetz@vdmmail.com](mailto:jbetz@vdmmail.com)



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