



### Benchmarks for Reviewing an Annual Giving Campaign

*This listing is intended to be inclusive, not exclusive – other factors may also merit review and analysis in a given situation.*

*Much of this data may be shared effectively as a graph or chart.*

Focus Area	Last Year	This Year	Trend line	Observations
1. Total Amount Raised				
2. # or % of Member Households Commitments				
3. % of Budget Fulfilled by Commitments				
4. % of Financial Goal Attained				
5. Est. Budget "Average Cost per Household"				
6. # or % Declared as Fair Share				
7. # or % at Theme Target (if any)				Ex: Give at 5% of AGI, etc.
8. Mean/Median Commitment				
9. # or % or Amount of Increased Commitments				
10. New Commitments (# or % or Amount)				
11. Mean/Median of New Commitments				
12. # or % of Members w/ Only Contribution of Record *				* If allowed in Bylaws
13. Mean/Median Contribution of Record				
14. # or % or Amount of Decreased Commitments				

<b>15. Number or % or Amount of Dropped Commitments</b>				
<b>16. # or % or Amount of Unchanged Commitments</b>				
<b>17. Quartile Distribution</b>				
<b>18. # or % that Accepted Visiting Steward (or attended an event)</b>				
<b>19. # or % that Came in After Official Close Out</b>				
<b>20. # or Amount of High Risk to Complete Commitments</b>				
<b>21. # or % that Have Not Responded by Close</b>				
<b>22. # or Amount/Mean/Median non-Members (<i>Friends?</i>)</b>				
<b>23. Any Notable Group patterns? (Music, Social Justice, etc.)</b>				
<b>24. The Board - Fair Share Status and Quartile Distribution?</b>				