

Yearlong Plan for KPIs and Metric Goals

Once you have a solid understanding of important key performance indicators (KPIs) and setting goals, it's time to make a plan. Unfortunately, simply coming up with this plan in your mind isn't enough. If you don't write it down and create a calendar to keep you on track, your chances of success greatly diminish.

In fact, studies show that writing down your goals increases your likelihood of achieving them by 42 percent! Every aspect of the DonorWerx Framework is geared towards helping your ministry accomplish what you've set out to do, so we've provided an example and template for creating a yearlong plan in the subsequent pages.

Remember that you can find these metrics in the SecureGive app. Fill out the blank resource after reviewing the example, and don't be afraid to dream big!

KPIs and Metric Goals Over 12 Months (Example)

September 2023

	<i>Goal</i>	<i>Actual</i>
GPA	\$30	\$28
FTD	10%	8%
RPD	90%	92%
% Dig	5%	5%
% Rec	3%	5%
DNR	40%	35%

October 2023

	<i>Goal</i>	<i>Actual</i>
GPA	\$33	\$30
FTD	10%	5%
RPD	90%	95%
% Dig	10%	12%
% Rec	7%	7%
DNR	40%	38%

November 2023

	<i>Goal</i>	<i>Actual</i>
GPA	\$35	\$35
FTD	10%	5%
RPD	90%	95%
% Dig	15%	15%
% Rec	10%	10%
DNR	40%	42%

December 2023

	<i>Goal</i>	<i>Actual</i>
GPA	\$38	\$40
FTD	10%	5%
RPD	90%	95%
% Dig	20%	22%
% Rec	13%	15%
DNR	45%	48%

January 2024

	<i>Goal</i>	<i>Actual</i>
GPA	\$40	\$43
FTD	10%	2%
RPD	90%	98%
% Dig	25%	25%
% Rec	15%	18%
DNR	45%	49%

February 2024

	<i>Goal</i>	<i>Actual</i>
GPA	\$45	\$45
FTD	10%	7%
RPD	90%	93%
% Dig	30%	33%
% Rec	20%	21%
DNR	45%	52%

December 2023

	<i>Goal</i>	<i>Actual</i>
GPA	\$38	\$40
FTD	10%	5%
RPD	90%	95%
% Dig	20%	22%
% Rec	13%	15%
DNR	45%	48%

January 2024

	<i>Goal</i>	<i>Actual</i>
GPA	\$40	\$43
FTD	10%	2%
RPD	90%	98%
% Dig	25%	25%
% Rec	15%	18%
DNR	45%	49%

February 2024

	<i>Goal</i>	<i>Actual</i>
GPA	\$45	\$45
FTD	10%	7%
RPD	90%	93%
% Dig	30%	33%
% Rec	20%	21%
DNR	45%	52%

June 2024

	<i>Goal</i>	<i>Actual</i>
GPA	\$55	
FTD	10%	
RPD	90%	
% Dig	50%	
% Rec	35%	
DNR	60%	

July 2024

	<i>Goal</i>	<i>Actual</i>
GPA	\$58	
FTD	10%	
RPD	90%	
% Dig	55%	
% Rec	40%	
DNR	60%	

August 2024

	<i>Goal</i>	<i>Actual</i>
GPA	\$60	
FTD	10%	
RPD	90%	
% Dig	60%	
% Rec	45%	
DNR	60%	

Abbreviation Summary

GPA: Giving Dollars Per Adult

FTD: First-time donors

Calculating Your Giving Metrics

First-Time Givers:

Repeat Givers:

Percentage Digital:

Percentage Recurring:

Calculate Donor Retention:

Giving Cycles (insert graph):

Current Congregation Engagement:

Potential/Existing Donors:

RPD: Repeat donors

% Dig: Digital gift percentage of all giving

% Rec: Recurring gift percentage of all giving

DNR: Donor retention rate

*** The above calendar assumes March 2024 has just ended in a fiscal year that started in September 2023. Information was all garnered from the SecureGive app. Your overall goal for most of these KPIs should be an increase every month.

Certain metrics, however, may remain low even when you're doing everything right. For instance, a church with a very high repeat donor rate (RPD) will see a lower percentage of overall giving coming from first-time donors (FTD).

In fact, an RPD of 100% means your FTD rate will be zero! If new members join your church, though, it will cause your RPD to drop even if the new congregants immediately tithe. Keep these nuances in mind when planning your calendar.

Also, note that the donor retention rate goals listed are high for the nonprofit sector. Fortunately, this isn't the nonprofit sector! Once a congregant gives, they're likely to continue doing so. You can improve this number by increasing recurring gifts (% Rec) through automatic payments. ***

KPIs and Metric Goals Over 12 Months

M/Y _____

Goal Actual

GPA
FTD
RPD
% Dig
% Rec
DNR

M/Y _____

Goal Actual

GPA
FTD
RPD
% Dig
% Rec
DNR

M/Y _____

Goal Actual

GPA
FTD
RPD
% Dig
% Rec
DNR

M/Y _____

Goal Actual

GPA
FTD
RPD
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DNR

M/Y _____

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M/Y _____

Goal Actual

GPA
FTD
RPD
% Dig
% Rec
DNR

M/Y _____

Goal Actual

GPA
FTD
RPD
% Dig
% Rec
DNR

% Dig: Digital gift percentage of all giving
% Rec: Recurring gift percentage of all giving
DNR: Donor retention rate

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