

## Fundraising Initiative Worksheet & Outcomes Analysis

Total Revenue Received/Anticipated \$ \_\_\_\_\_ A

Total Cost of Initiative Pursued \$ \_\_\_\_\_ B

- Estimate of staff cost \$ \_\_\_\_\_
- Estimate marketing/mailing/printing costs \$ \_\_\_\_\_
- Estimated catering, decoration, supplies/other costs \$ \_\_\_\_\_

Total estimate of event costs (place above right - B) \$ \_\_\_\_\_

Net Fundraising Revenue (Net Profit = A less B) \$ \_\_\_\_\_ C

# of Households Solicited/Contacted \_\_\_\_\_ D      # HH Attending/Participating \_\_\_\_\_ E

Return on Investment (ROI):  $\frac{\text{Net Profit C}}{\text{Total Cost B}} \times 100 = \text{_____} \%$

Cost/Dollar Raised (CPDR):  $\frac{\text{Total Cost B } \$ \text{_____}}{\text{Total Revenue A}}$       Cost/Sol. HH (CSH):  $\frac{\text{Total Cost B } \$ \text{_____}}{\text{\# Solicited HH D}}$

Average Raised/Participant HH (ARP)  $\frac{\text{Total Revenue A}}{\text{\# of Participants E}}$  \$ \_\_\_\_\_

Net Raised/HH Participant (NRP)  $\frac{\text{Net Profit C}}{\text{\# of Participants E}}$  \$ \_\_\_\_\_

*What is the purpose (are the purposes) of this initiative?*

*How much did each dollar raised cost to generate (as a dollar amount/percentage)?*

*How did it foster deeper engagement with new, current, and major donors?*

*Is there one way you can use this event to strengthen new donor acquisition, donor retention, major donor cultivation?*

*Are there some takeaways to planning for future events you can apply to goal setting for future events?*