RaiseTell

Using the Waterfall Analysis of LFY Giving

How last full year's revenue changed, and why – by segment, with the donors behind every movement – so you know where to focus this year

Dashboard 192 · QX192

Review at the close of each fiscal year

One total hides many movements

Two organizations can post the same year-over-year change while one is quietly losing major donors and replacing them with new small gifts. The waterfall shows the offsetting flows, so you can see whether growth is healthy and where the leaks are.



The movement buckets

Lapsed
Gave in the prior year, nothing last full year

Gave less
Stayed in the segment but gave less

Moved down
Dropped to a lower segment (downgrade)

Same amount
Stayed in the segment, gave exactly the same

Gave more
Stayed in the segment and gave more

Moved up
Rose into a higher segment (upgrade)

Recaptured
Back after a year with no gift

New
First gift ever, last full year

Segment moves show up twice: out of the old segment's waterfall and into the new one's – so a Top donor who drops to Middle is a loss for Top and a gain for Middle.

The Waterfall tab, then a drill tab for every bucket

Waterfall

Three waterfalls – Top, Middle and Bottom – each walking from total giving in the prior year to ending revenue, with the number of donors and dollars in every bucket and a waterfall chart.

Drill tabs

- One tab per bucket, named prior segment – LFY segment – movement, e.g. LFY-Top-Top Decreased or LFY-Middle-Top-Upgraded
- The top shows the bucket and its record count; donors are listed largest first
- Each row: prior and LFY giving and the change, this year to date vs the same point last year (YTD Status), giving history, lifetime giving, constituency and fundraiser

At year close: find the leaks and the drivers

1 2 3 4  5 

Review together

Walk the three waterfalls with your development director and leadership.

Win back

Use the Lapsed tabs to build win-back lists, largest prior gifts first. Check YTD Status for anyone already back.

Retain

Use the Gave less and Moved down tabs for retention conversations.

Learn what grew

Read the Gave more, Moved up, Recaptured and New tabs to see what actually drove growth.

Set this year's focus

Pick the segments and buckets to work, and hand the donors to fundraisers.

QX144: the same waterfall for the current year

QX192 -Last full year

Thisdashboard

- Complete picture of last year's flows
- Review at year close to set this year's priorities
- Builds win-back and retention lists

QX144 -Current fiscal year

Identical layout, current-year data

- Of little value early in the year -most donors haven't given yet
- Several months in, it shows patterns that will shape the full-year results
- Use it in the second half of the year to check whether last year's leaks are repeating, while there is still time to act

Watch-outs and measures of success

Watch-outs

- Lapsed lists include deceased donors -check the Deceased column before any win-back outreach.
- Dollars matter more than counts: a few lapsed Top donors can outweigh many new small gifts.
- A donor who changes segment appears in two waterfalls: a loss in the segment they moved from and a gain in the segment they moved to. Don't add the movements up across segments.

Measures of success

Smaller leaks
fewer dollars in the Lapsed and Moved down buckets year over year

Bigger drivers
growth in the Moved up, Recaptured and New buckets