RaiseTell

Using the At-Risk Donors Dashboard

Whose giving is declining- and who is late against their own giving rhythm -so you can reach them before they lapse

Dashboard 271 · QX271

Two warning signs, one working list

Declining

Total giving in the last full fiscal year fell more than 5% vs the year before.

Decline Trend: 2-Year Decline (down >5% in each of the last two years) or 1-Year Decline.

Overdue

Late against the donor's own rhythm, learned from gifts and pledge payments in the last 36 months (2+ activity dates).

Recency Status: Overdue -follow up, or Well overdue - likely lapsing.

Either sign puts a donor on the list. Risk Reason says which:

Declining + Overdue

Overdue only

Declining only

Deceased donors are excluded.

How "overdue" is measured

Recency Ratio = Months Since Last Activity ÷Typical Interval (Months)

Example: a donor who usually gives every 6 months and last gave 9 months ago has a ratio of 1.5.

Ratio 1 or less	Ratio 1 to 2	Ratio more than 2
On track	**Overdue -follow up**	**Well overdue -likely lapsing**
Declining donors only	Late, but still within twice their usual gap	More than twice their usual gap

Trend codes (most recent year first): I up · E about equal (within 5%) · D down · L none that year · R back after a year with none · N first year. Giving Amt Trend uses dollars; Gift Count Trend uses number of gifts.

Three tabs: check the Overview, work the list



Overview

Live counts by risk reason and decline trend, how many are Well overdue, the rules for who is listed, and a key to the codes.



At-Risk Donors

The working list, one row per donor. Columns run: who and why (orange), recency (navy), giving history (blue), reference (grey).



Summary

Donors by segment and risk reason, and how many decliners have a 2-Year vs 1-Year Decline.

Each month: prioritize, hand off, steward

1 2 3 4  5 

Top and Middle first

Filter Segmentto Top, then Middle, and Risk Reason to Declining + Overdue. These come first.

Then the most overdue

Sort by Recency ratio (most overdue first) to find Well overdue donors before they lapse.

Hand off

Filter by Assigned Fundraiser to give each fundraiser their own at-risk donors.

Steward, don't ask

Reach out with an impact update, a call or an invitation that reconnects them to why they gave.

Look for the cause

For Declining only (on track) donors, ask whether their circumstances or your communications changed.

Yellow dropdowns filter and sort the list

Filters

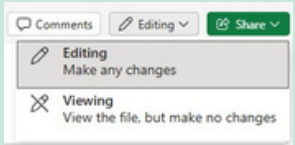
Segment, risk reason, decline trend, recency status, FYTD pace vs last year, giving amount trend, segment change, last activity type, constituency, fundraiser. (All) clears a filter.

Sorts

Recency ratio (most overdue first), months since last activity, lifetime net giving, giving last full FY, donor name -plus every filter field.

Combine filters: for example, Segment = Top and Recency Status = Well overdue -likely lapsing shows your highest-value donors who are closest to lapsing. Row 4 shows "Showing X of Y donors" so you know a filter is on.

Switch to Editing first. The dropdowns don't work in Viewing mode -change it at the top right of the Excel ribbon.



Read the list carefully and measure results

Watch-outs

- Segment "None" means no giving in the last full fiscal year. These donors have already skipped a year -check their lifetime giving before passing them over.
- A donor who gave nothing last year is coded L, not D, so they appear as Overdue only, not Declining.
- The list changes as gifts arrive -review it monthly.

Measures of success

Re-giving rate
share of listed donors who give again within six months

Fewer Well overdue
a falling count of donors likely lapsing

Retention
improved retention among Top and Middle donors