

Dashboard Overview

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Watch this video to learn about the dashboard on your GiveSmart Donor CRM account.

Dashboard Containers

Total Raised Year to Date

- Quick total of funds raised year to date

Quick Actions

- Link to Invite a Team Member
- Link to Add New Contact
- Link to Record a Gift

Key Statistics

- Recommended statistics to track per the AFPFEP

Donor Annual Review Retention Rate

- Your Donor Annual Revenue Retention Rate measures how giving from your donors is growing over time and is the percentage of total revenue donors have given in the most recent 12 months, vs. two years ago (months 13-24).

It is a simple way of knowing that of the donors who gave in each of the last two years, how much money (as a percentage from two years ago) did they give in the last 12 months?

A fantastic Donor Annual Revenue Retention Rate is anything over 90%, and a truly exceptional nonprofit might be more than 100%. That is, while some donors may have stopped giving in the last 12 months, the ones who are still giving are giving more to overcome those losses from donors who stopped giving.

Donor Retention Rate

- The Donor Retention Rate measures how effective you are at retaining your donors. It is the percentage of donors who gave in the last 12 months, vs. all of the donors from two years ago (months 13-24).

A fantastic donor retention rate is anything over 80% and is quite rare - the average Donor Retention Rate for nonprofits in the United States is 44% as of 2020.

While the Donor Retention Rate measures the percentage of your donors who are still donating in their second (or more) years, the Donor Annual Revenue Retention Rate is a better indicator of how much revenue the retained donors are giving, and if that giving is trending up or down over time.

Most Recent Donors

- List of the most recent donors with activity

My Activities

- View outstanding activities
- View completed activities
- Add activities to your calendar
- Number assigned

Yearly Comparison

- Year over year comparison of funds raised

Donor Map

- View the mailing address locations of your donors
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