



Development Reporting 101:

A Guide to Designing Insightful
Reports for Daily and Long-Term
Planning

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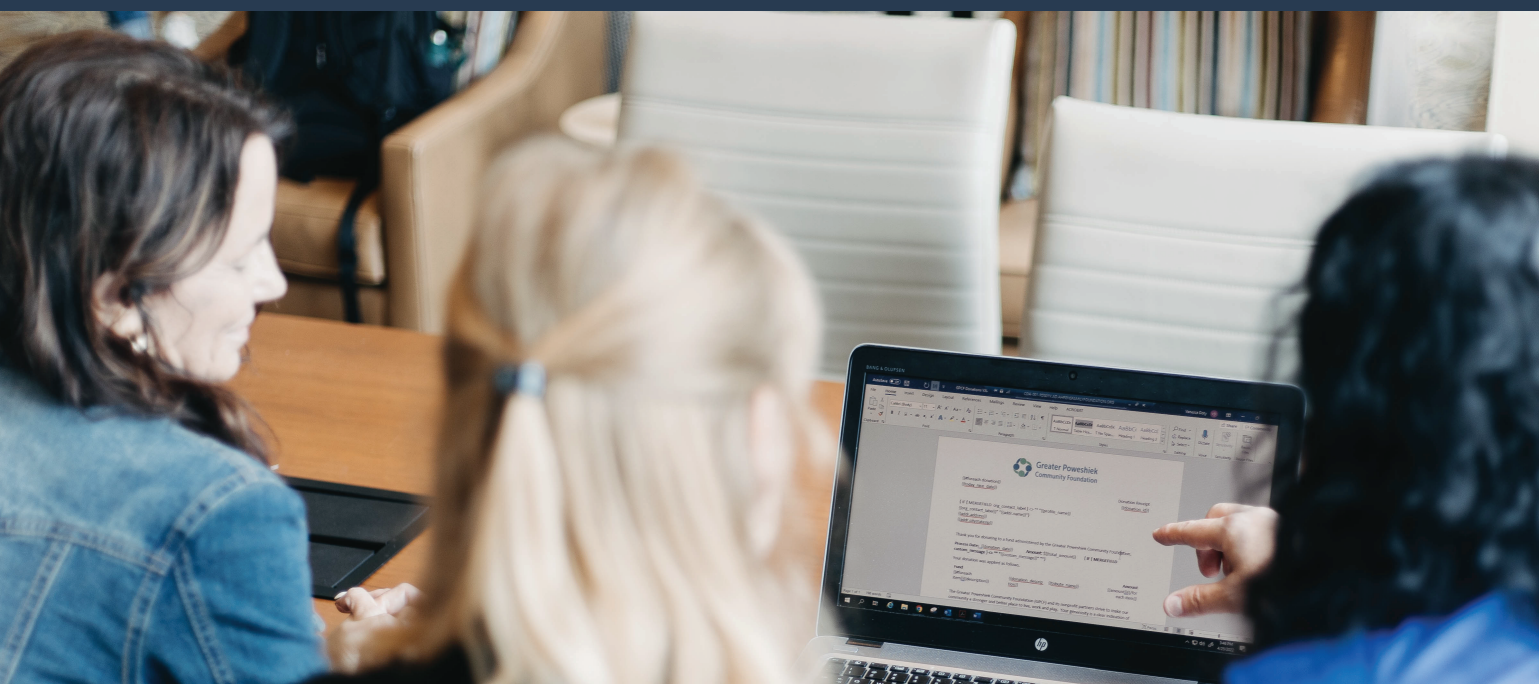




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Part I: Getting Started with Development Reporting

Managing any type of organization requires reporting on the past and present to inform and plan. Standard operations management activities include understanding historical data, forecasting budgets, measuring results, and planning for the future. Reporting is essential to every single one of those functions. Without it, management strategy is based on anecdotal information or gut alone. Any thoughtful leader will want to review relevant reports before making strategic decisions about the future. Part I of this guide has three sections: The Power of Development Reports, Foundational Data Principles, and Report Design Matters. Each section builds on the next to help you get off on the right foot with development reporting.

The Power Of Development Reports

The development function of any nonprofit organization can make or break its impact. Given that [80% of all giving comes from individuals](#),¹ most nonprofits rely heavily on individuals to make up their annual operating budgets in service of advancing the greater good. How can an organization make the best use of its development resources to achieve the highest results possible?



The answer lies in good reporting. Ongoing experience with reporting and reflection processes will ultimately yield even greater results. Our promise to you is that thoughtful use of development reports at regular intervals will serve to:

- Foster a [culture of philanthropy](#)² throughout the organization
- Position development as vital to the overall organization and its impact
- Educate key staff and board members on an ongoing basis
- Improve year-over-year development results
- Expand the organization's impact
- Promote a greater understanding of donor motivations and desired impact

The remaining sections of this guide will explain common fundraising metrics and show how to incorporate them into ongoing reporting processes. Even if your organization already uses some reports, this workbook will optimize your results.

Foundational Data Principles

The majority of development professionals don't have extensive data management or visualization training. It's more important to know how to read the charts and act on them than to design them from scratch. With that in mind, there are still some universal principles that we'd like to share with you to equip you and your team to make the most of the information you have at your disposal.



Garbage in, Garbage Out

Development professionals rely on information about donations and solicitation activities to monitor progress and make decisions about future plans. We pay attention to donation amounts and donation dates, send appeals to individuals and households, and connect with donors. We track this information to evaluate our success in the past and plan for future results. What happens if we don't keep good records? It might go without saying that we'll have a hard time trusting the information and making decisions based on it. A very useful concept in the computer science and mathematics world explains this phenomenon: [garbage in, garbage out](#).³ In other words, the quality of the input results in the quality of the output. If you put garbage into a system, you'll get garbage out. Simple as that. Remember this when planning for relevant reporting. The reports you create will only be as sound as the underlying data.

Data Hygiene Creates Efficiencies

The secret weapon of high-quality reporting is consistency with field-level data standards. Data becomes more reliable and easier to use with given rules or agreed-upon practices. While variety may be the spice of life, it makes data aggregation and reporting very challenging. If data is not entered consistently, it becomes time consuming to manipulate. Data clean-up for one-off reporting wastes time and risks making errors. [Data hygiene practices](#),⁴ on the other hand, create the consistency needed for reliable reporting. Data hygiene also helps [prepare donor data for migration](#)⁵ if changing software solutions. Data hygiene includes employing data entry standards and conducting periodic sweeps to catch and correct errors.



Report Design Matters

Now, more than ever before, we live in a visual world. We're bombarded by images all day long. Our eyes are drawn to colors and patterns, and we can easily spot trends. The value of a good visual lies in its ability to tell a story with few words, communicate context through imagery, and convey memorable messages that users retain long after seeing the picture. In the case of development, it's one thing to say that the majority of giving comes from individuals. It's entirely another to show an outsized difference with a pie chart of overall giving sources or a bar graph illustrating relative amounts. The same can be shown multiple ways and lead to similar conclusions, albeit with different emphasis. That's where the art of data visualization comes in.

Beginning With the End in Mind

A report is only as good as the intention behind it. The key behind relevant reporting is that it answers a question in the mind of the reporting audience. If the stakeholders consuming the report do not care about the story being told by the pictures or tables in front of them, the report carries less weight. The power of strong reporting is that it communicates and reflects the truth in numbers and images in a way that is otherwise inaccessible. Sound development report design starts with the report's purpose, target audience, and frequency. These elements ought to dictate what information is presented to stakeholders and how.



Data Visualization 101

When it comes to reporting, the many different types of available charts can feel overwhelming. Making an informed choice about which to use in each situation can change how a person interprets the information—particularly in the case of board members, who may not be accustomed to reviewing development data regularly. Presenting the data in a clear and readable format can significantly affect the reviewer’s experience. The following list describes common chart types and situations for best use.

1 Bar Graph

Best for showing significant changes between periods (over time) or for comparing categories of data. Also used for appreciating the center, shape, and spread of a data set (as in a histogram) or for frequency distributions.

2 Line Graph

Useful for showing changes in data over time for one or more data sets. Particularly good for showing small changes, which are more easily seen in a line graph versus a bar graph representing the same data.

3 Pie Graph

Good visual for showing parts of a whole. The fewer slices of the pie, the better. Consider grouping very small sections into one category of “other” to reduce the overall number of pieces and using one color pallet for a range of hues rather than rainbow colors.

4 Heat Map

Another option for showing parts of a whole. Can better illustrate a greater number of parts than a pie graph.

5 X-Y Plots

Describes the relationship between two variables. Less common in the development world, but possible for things like the number of appeals received versus donation size for a given year.



The use of data visualization tools can simplify data analysis and amplify the effectiveness of the reporting. Many options are available, from spreadsheet systems like Excel or Google Sheets to specialized cloud software, including Power BI, Tableau, and LucidChart, or software development environments using Python or other statistical programming languages. In addition to external options, donor database management systems often include their own [native visualization dashboards or tools](#).⁶

Using Data Visualization Tools

When choosing the best tool for a given purpose, it's important to keep an eye on sustainability. What solution will be most sustainable going forward? How many people have the necessary skills to use the tool? Or have the capacity to learn it? Are there opportunities to leverage automation? Is the tool flexible? Can changes be made to the visuals or templates? Building a process that takes more time or skill than available on a team defeats the purpose. Make sure to right-size the effort to suit your situation.

Reporting Basics Summary

With proper planning and emphasis on outcomes analysis, a nonprofit's development program can attain great things. Armed with intentional reports that tell a clear story, nonprofit leaders can collaborate to make important decisions and strategically pursue their development goals. The recipe for this success heavily relies on strong underpinnings of data integrity and reporting design. In the next section, you'll learn how to leverage development reports to best use the information you have on hand.



Part II: Common Development Reports and Uses

There are countless ways to slice and dice development data, but it all boils down to analyzing philanthropic gifts. Your organization needs to know how many donations are being made, for what amounts, and in response to which fundraising efforts from your organization. Towards that end, this section will introduce various common reports, key performance indicators (KPIs), and metrics, along with explanations of how to use them. There are many options available. All of them should be used in some combination, and each needs to be customized to suit the specifics of each organization. Part II covers different types of gift reports, outcomes analysis reports, and common metrics/KPIs worth exploring.

Gift Reports and Uses

Three main types of gift reports appear in development reporting: source, purpose, and solicitation method. Each of these reports divides the total gifts into different segments to show relative differences among donor types, fund usage, and fundraising activities. They serve as the foundation of your organization's fundraising analysis.

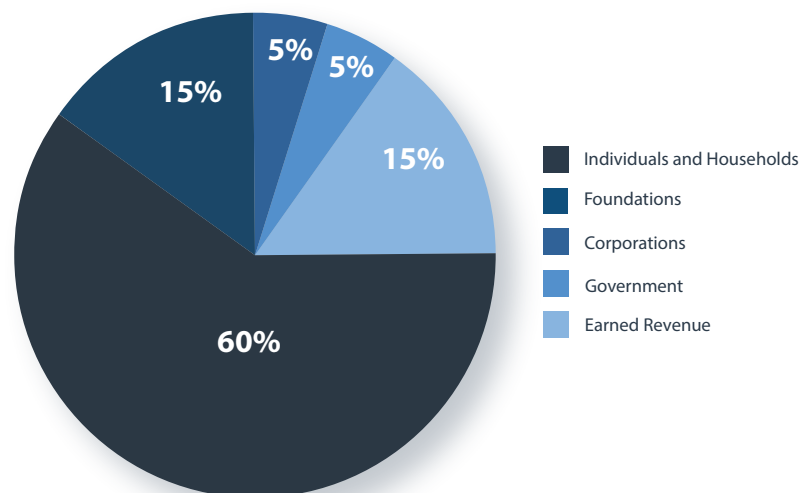


Source Reports

As the name suggests, source reports indicate where donations came from by category name. The key to using source reports is deciding which categories are best for your organization to highlight. Ensure that the reports illustrate, explain, or measure relevant information for your organization. There are two primary ways to organize source reports:

1 Donor Mix By Category

Common categories for this report include individuals, foundations, corporations, government, and earned revenue. Any significant grouping, however, deserves its own bucket. For example, is planned giving a large enough portion of individual giving to deserve its own bucket? Or do you want to emphasize certain categories to show growth or highlight a specific goal? These are important considerations when choosing which categories to display.

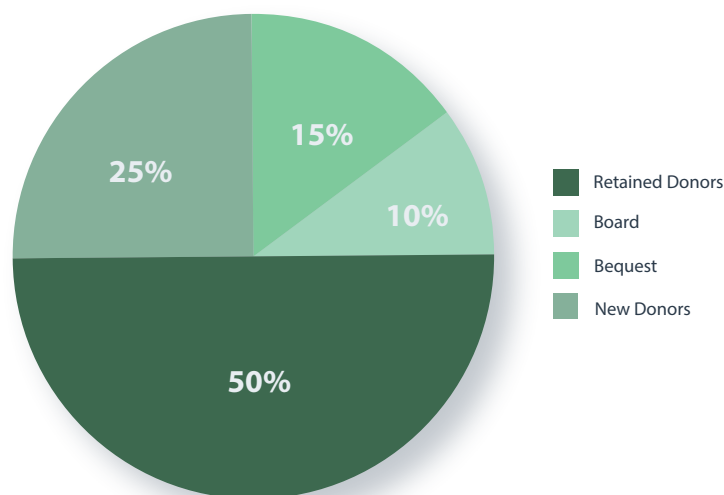




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Detailed Donor Mix Within Category

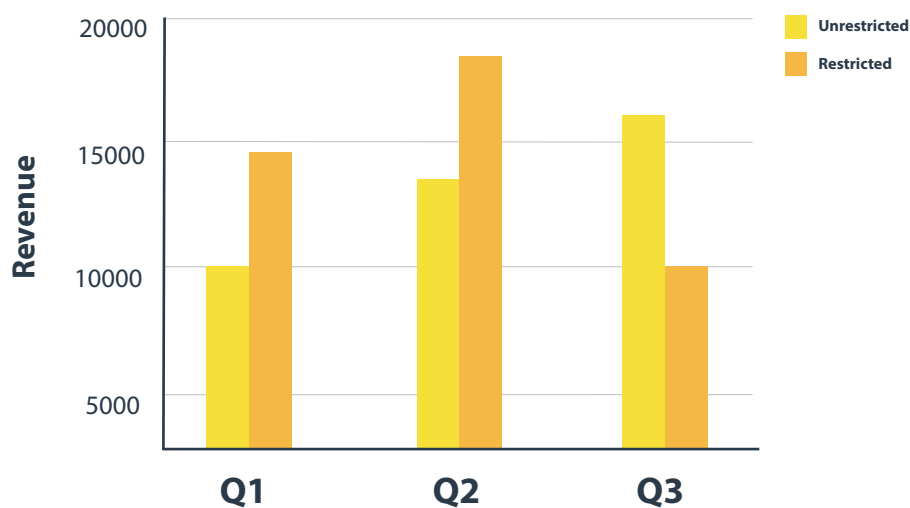
You may wish to break down the donor mix even further within each major category to show greater nuance. In this case, a detailed donor mix report will show what makes up each section of donors. Again, deciding the appropriate segments is key. For example, with individual giving, it's common to show donations segmented by demographics or donor behavior (e.g., members versus non-members). Another standard split within individual giving includes board members, new donors (acquisition), retained donors (renewal), and bequests. In the case of grants, it's common to split the awards into government, corporations, and foundations. If government grants have a significant size, further breaking them down by type may make sense: local (city or county), state, and federal government grants.





Purpose Reports

Even though an organization may reach its overall funding goal, the split between restricted and unrestricted funds may limit its ability to achieve strategic goals. Looking at gifts based on how the funds can be used helps highlight possible funding gaps.



This type of report is essential for organizations that rely significantly on government grants, which generally have more restrictions than other sources of funds and more limitations on usage. In some cases, a grant may require increasing staff but not allow funds to be used for salaries. Thoughtfully managing this type of situation challenges many nonprofit leaders. Preparing purpose reports can help with budgeting conversations as well as defining development activities to avoid programming interruptions due to lack of available (unrestricted) funding.



Solicitation Method Reports

Analyzing the success of various solicitation methods will inform next steps for development activities. These reports help answer the questions, “Are our efforts working?” and “Which solicitation activities work best?” They also help the development team better understand the behavior of their unique donors. Each organization finds that donors respond to different types of solicitations:

- Are people giving online after reading the organization’s newsletter?
- Do donors prefer to write a check after receiving a mailed appeal letter?
- Do giving links on social media platforms lead to any gifts?

An organization’s ability to get this level of detail will depend on what data they track for each donation. Typically, a gift will be associated with a campaign, appeal, and solicitation method. Frequently it’s difficult to know exactly why or which solicitation prompted a donor to give. Maintaining a history of solicitation communications along with the date of the gift will start to reveal the combination of activities that drives the greatest response.

Outcomes Analysis Reports and Uses

Important management activities for any nonprofit include measuring and analyzing outcomes. To conduct this thorough analysis, additional reports will supplement the findings from the previously described gift reports.



This section describes some standard ways to review overall fundraising effectiveness. Note that smaller and/or younger organizations might not be able to use some of these measures. It takes time and effort to track and analyze all costs—not just hard costs, but a portion of executive time, development staff time, volunteer time, etc. [The third section](#) of this paper will give additional ideas for application and the suitability of using specific tools in different situations.

How much money did we raise?

Every organization wants to bring in more donations than they spend on development efforts overall. This is somewhat obvious! However, figuring out the net fundraising return is the first step in analyzing overall development results. This is measured by subtracting total fundraising expenses from the total amount raised.

$$\text{Total Amount Raised} - \text{Total Fundraising Expenses} = \text{Total Fundraising Net}^7$$

When comparing the success of different strategies across all development efforts, some organizations will measure the return on investment (ROI). This is calculated by dividing the total revenue by total expenses as follows:

$$\text{Total Revenue} / \text{Total Expenses} = \text{Return On Investment}$$

An example of this is looking at events versus appeal letters. Comparing the ROI of each will help determine which is worth the effort. Note: intangible benefits are not included in this calculation, so there may be cases where a low ROI relative to another strategy may not indicate its true value to the organization. Be sure to analyze these figures in context to consider the whole situation.



What is our cost of fundraising?

Another primary measure of fundraising effectiveness is the total cost of fundraising. This can be calculated across the entire organization or for a specific effort on its own. The Association of Fundraising Professionals defines this metric as the “average amount it costs to net one dollar across the entire organization.” One way of calculating it is as follows:

$$\text{Total Fundraising Expenses} / \text{Total Fundraising Net} = \text{Cost of Fundraising}$$

Another common way to look at this same information is to calculate the cost per dollar raised (CPDR). This measures the cost of raising one dollar by dividing the total expenses by the total revenue. Either method of measuring fundraising effectiveness can be done for the organization at large or for specific strategies. The granularity will depend on the data available or the question at hand.

$$\text{Total Fundraising Expenses} / \text{Total Fundraising Revenue} = \text{Costs Per Dollar Raised}$$

Tools for Measuring Fundraising Effectiveness

The Association for Fundraising Professionals (AFP), in collaboration with partners across the nonprofit sector, has created tools and resources for nonprofit leaders to contextualize fundraising results. [The Fundraising Effectiveness Project](#)⁸ provides sector annual reports, a Fundraising Fitness Tool, and a Fundraising Net Analyzer, among other things.



In particular, there are helpful industry trends and averages to compare your organization's fundraising results to others to get an idea of your strengths and areas for improvement.

A Word of Caution (or “Reasonableness”)

The Fundraising Effectiveness Project and other industry tools can help benchmark your organization's fundraising outcomes within broader trends and with similar organizations. However, keep in mind that context is everything! Your geography, specific donors and prospect pool, mission and cause area, organization age, organizational leadership, and other factors converge to make up your philanthropic opportunities and impact your fundraising success. Use these measures to enhance your understanding of your own data rather than determining your analytical conclusions. Take time to consider reasonable fundraising costs for your organization at this stage in its development. Where do you need to invest more resources to develop your pipeline or strengthen relationships with donors?

Common Metrics/KPIs

Within development reports and dashboards, there are common metrics or KPIs that are conventionally used across the entire nonprofit sector. Many may already be part of your organization's vernacular. Others might be worth consideration in your future reports.



Donor Retention

Retaining and motivating existing donors costs less than acquiring new ones,⁹ so it is well worth the effort. Taking the time to focus on donor retention, particularly in the early years of an organization's growth, will help build a donor base to rely on for years to come. Monitoring these metrics allows development professionals to create individualized [moves management plans](#)¹⁰ and maximize the results from broad appeals for support. The following two standard donor retention metrics compare gift behavior of the current fiscal year against prior years:

1 Last Year But Unfortunately Not This (LYBUNT):

Donors that fall into this category have made a donation in the last fiscal year but not the current fiscal year. A LYBUNT report could show a complete list of names, a percentage of last year's donors that have lapsed, or a donor report by gift range. Make sure to allocate time and effort to reconnect with this group.

Gifts Given in 2021

Name	Amount	Type	Last Gift Given On
Mr. And Mrs. Adams	\$50	Donation	2/1/21
Ms. Smith	\$750	Recurring	3/15/21
Mrs. Roberts	\$200	Donation	3/22/21
Mr. Jones	\$15	Recurring	4/11/21

2 Some Year But Unfortunately Not This (SYBUNT):

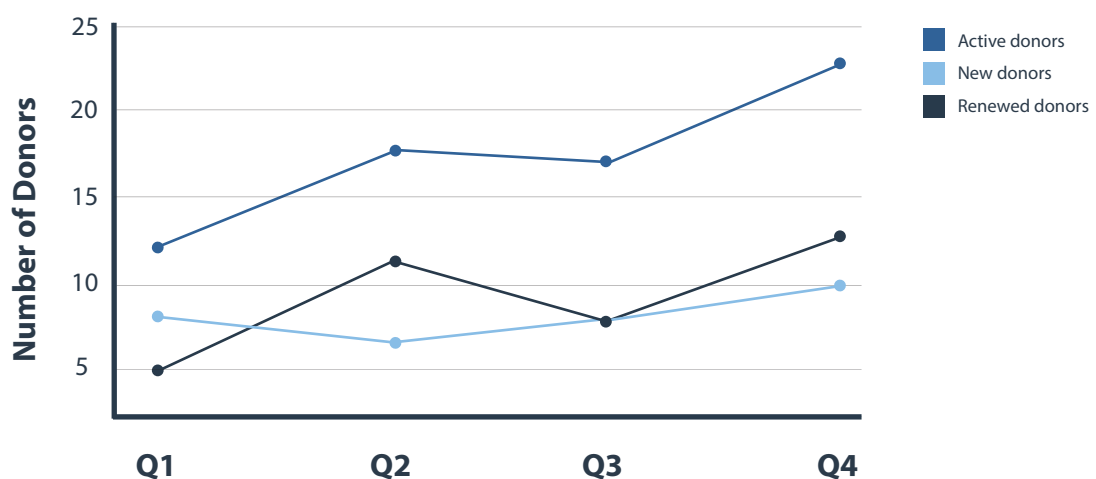
Donors in this group have made a donation in any year of record but not in the current fiscal year. A SYBUNT report will likely include proportionately more donors than a LYBUNT report because of the longer time horizon. While possibly higher in priority than brand new prospects, this group may need further stratification before defining appropriate moves management plans.



Continued giving to the organization is an important metric of donor retention. Donor movement between giving levels (up, down, or maintaining) also expresses moves management results. Including specific segments in retention reports will help to illustrate this. If 75% of your major donors decreased their giving last year, that is critical information! Conversely, if 60% of your first-time donors renewed and made an increased gift this year, your moves management process is working well.

Donor Acquisition

Exploring the number of new donors acquired by an organization shows growth potential. Comparing this number against donor retention gives a sense of donor turnover. How many new donors did the organization get in the last period? In the current period? How has this number changed over time? What percentage of current fiscal year donors are new? Does the organization have a net gain or net loss of donors? Because it's more expensive and more difficult to recruit new donors than retain an existing donor, this number provides information about how to approach donor acquisition in the overall development plan.





Other Key Reports

Similar to donor retention and acquisition reports, many other reports describe or analyze aspects of donor behavior. Here are some of the common reports and accompanying questions they help to answer:

1 **Average gift size over time**

Has the average gift amount to the organization changed over time? What do these trends tell you about the donor base?

2 **Donor pyramid**

What percentage of gifts are from your top 10 donors in the current fiscal year? Last fiscal year? The Pareto Principle applies to fundraising in that usually, 10 to 20% of the total donor pool (i.e., top donors) are responsible for 80 to 90% of all total giving. What percentage of donors account for 80% of the gifts? Look at this to help determine the size of "major gifts" for your organization.

3 **Growth in total giving over time**

Shown in dollars and/or number of donors, this report explains the aggregate growth of an organization's giving program. Is there a visible trend in the total gifts? What information can you gather from this about your donors? This type of report can also be used to assess the donor behavior of a specific individual by plotting their annual gifts over time.

4 **Donor mix by category**

A report of this nature helps to evaluate the diversification of funding sources. While not necessary for all organizations, diversification of funding provides some element of risk protection. According to [William Foster and Gail Fine](#),¹¹ not all organizations need to be "fully diversified" to thrive, but they do need to have the "right" diversification to be sustainable for their situation.



5 **Dependence quotient**

Similar to the donor pyramid and donor mix by category reports, a [dependence quotient](#)¹² indicates how vulnerable an organization may be to the shifting priorities of its top donors. It is calculated by dividing the sum of contributions from the five largest funders by the total organizational expenditures. Depending on the concentration of the largest gifts, your organization may choose to include more or less than the five largest funders.

6 **Lifetime value of donor**

What are the appropriate [donor acquisition costs](#)¹³ for your organization? Looking at the average lifetime value of a donor for your organization will help answer that question. Reviewing the lifetime value of a single donor may quickly reveal which major donors to invest more time in.

7 **Average gift frequency**

What is the average gift frequency for your organization's donors? How does this inform the communications and solicitation practices that you implement?

8 **Event attendance**

Has a recurring or annual event retained its attendance levels over time? Compare the same event from one year to the next or compare the event attendance of two similar events. Have the community's preferences changed?

9 **Social media metrics**

Social media is primarily a concern for communications reports. From a development perspective, the main thing to look at with respect to social media is whether people are giving in response to social media tactics. This will help determine how much effort or presence is needed in the social media space according to an organization's funding goals.



Common Development Reports Summary

There are many different types of development reports and metrics that help development professionals to analyze fundraising outcomes and trends. This information supports the planning process, helping nonprofit leaders make decisions about how to expend effort and in what areas. While many reports and metrics are included in this section, not all are relevant to any given organization. Industry best practices suggest that all three types of gift reports—source, purpose, and solicitation method—should be used regularly. Deciding what other reports to use will depend on the data collected (ability to segment donations) and goals or efforts that an organization is interested in monitoring.

Part III: Successful Development Reporting Processes

It's one thing to understand the importance of various reports; it's entirely another to put them to use. This section explains how to put fundraising reports into action with ongoing operations.

Annual Planning

Managing any type of organization requires reporting on the past and present to inform and plan for the future. The annual planning process provides an opportunity to reflect on what went well, consider what could have gone better, and plan for the future.



Historical Analysis

While historical performance does not predict future results, it does provide context for planning purposes. When available, historical reports offer internal benchmarks for improvement. Use [solicitation reports](#) to understand your donors—what stories, methods of solicitation, and times of the year most inspire them to give? How can you use this information to be more efficient? As described in the previous section, there are many opportunities to look for changes in donor behavior over time. Where is donor engagement increasing? Identifying trends from macro analysis contributes important information for all types of planning processes.

Budgeting

The first step of the budgeting process involves looking at historical reports to understand what may have worked (or not worked) in the past. How close was the expected budget to the actual budget in recent years? Next, review the [purpose reports](#) to understand the ratio of restricted to unrestricted funds. As any nonprofit leader knows, this is a critical component of the budgeting process. Next, align the current and expected ratio of restricted and unrestricted funds with the organization's anticipated budget to identify potential gaps.

Fund Development Planning

A long-term fund development plan may cover a time range of three to five years. Just like a strategic plan or any other long-range planning document, keeping it current retains its relevance.



Likewise, the fund development plan should be reviewed annually and adjusted to appropriately guide the organization towards strategic goals. During this annual update, it is a good time to intentionally decide which reports and metrics you will use throughout the year and establish responsibility for who will run those reports, when, and how they'll be used for real-time adjustments.

Monitoring Progress

In addition to a formal, annual review of outcomes, the executive director and development team should monitor progress throughout the year. Reporting and analysis may need to be customized depending on organization size, revenue streams, and staff capacity.

Reporting Cadence

Establishing the appropriate frequency of reviewing reports can save time and effort and help avoid over-analysis. Which reports need to be run on a weekly or monthly basis? These include reports that provide timely information for situations when staying up to date is important, such as new donor reports for special acknowledgment purposes. Some results, however, take time to show through the numbers, so looking at reports too frequently can result in inaccurate conclusions. For example, reviewing donor retention rates daily would definitely waste time. That metric won't change much within a fiscal year if looking at annual donations. With that in mind, consider which reports need to be reviewed quarterly or annually. Use the purpose of the report review to help determine cadence. Is the review actionable? Or simply an FYI?



Real-Time Reporting

In contrast to reports created at certain intervals for specific audiences, nonprofit executive leaders also rely on real-time reporting when available. Many donor management systems have customizable dashboards for real-time progress reports and monitoring. Review what's available in your system; experiment with customizing the widgets or options to suit your needs. For example, take a look at how the system defines a year. Is it a calendar or fiscal year? Set the preferences to suit your needs. Are there year-to-date features where you can compare current year-to-date against last-year-to-date at the same point in the year? This is handy for relative comparisons and not as easy to calculate with raw data. The efficiency of using a dashboard may outweigh the cost of creating custom reports at certain intervals. In this case, set calendar reminders to study specific reports that need attention infrequently, rather than obsessing over them too regularly.

Sustainable Process

For all of the information we've shared so far, it's imperative to keep sustainability in mind. In many cases, it's not sustainable to look at all the possible metrics or build all the reports an organization may want to see in a perfect world. The nature of nonprofit management gives leaders the experience of making tough choices regularly—often being forced to choose the lesser of two evils. Efficiency reigns supreme for nonprofits, and it's no different for operations management. Building intentional and sustainable processes is key to successfully using development reports. [Revisit the tools section](#) for more on how to implement a sustainable strategy.



Sharing Reports

Deploying data to various organizational leaders and stakeholders plays an important role in managing a successful nonprofit. Just like we promote customizing donor communications by segment, customizing internal reporting by audience also makes for good operational practices. When thinking about sharing reports, five key audiences come to mind: board, staff, donors, community, and volunteers. Within those groups, there may also be subgroups that require specialized reporting. Still, the average nonprofit would do well to consider those groups and think about what reporting makes sense for their eyes and which format will be most effective. How much time does the audience have to review the report? What is a reasonable length for the report? Should it be more visual than textual? How will the audience receive the report? Do they retrieve it on their own? Is it emailed to them as a PDF? Or can they log in to a portal and view the report online? What is the purpose of the reporting (annual planning versus monitoring)? Consider these questions, among others, when defining best reporting practices for your various audiences.

Refining as Appropriate

It's important to continue refining your reporting practices as circumstances change. Consider things like organizational growth, environmental changes, or new strategic priorities as opportunities to revisit development reporting intentions.



An organization may choose to employ this refinement approach during inflection points of change, but they might also incorporate them into annual planning processes. Even if there are no internal markers of change, staying on top of industry trends and shifts in best practices or other guidance are important reasons to review one's reporting processes.

Reporting Processes Summary

Standard operations management activities include understanding historical data, forecasting budgets, measuring results, and planning for the future. Reporting is essential to every single one of those functions. Without it, management strategy is based on anecdotal information or gut alone. Any thoughtful manager seeking to guide their organization towards their goals will want to review past performance and reflect on current results before making strategic decisions about the future. Given the many audiences and purposes of the reports, taking an intentional approach to using them through annual reporting and monitoring activities improves communication, trust, and clarity among all stakeholders.



About the Authors



Diana loves helping nonprofits flourish through her role as Associate & Data Specialist at AltruNext. She has deep experience helping teams to define processes and design technology solutions that expand their organizational capacity. Diana appreciates working with clients who are at a growth inflection point, looking to abandon the slapdash approach and systemize their operations to become more efficient, professionalize their product, and increase their impact. When not in the office, she can be found walking her dog or otherwise enjoying the great outdoors.



Kristin Raack, CFRE, GPC, is the Founder and Principal of AltruNext, a firm that helps nonprofits flourish. Over the past 20 years, she's helped a diverse portfolio of nonprofits expand their impact. She guides clients to success through organizational assessments, strategic planning, and all aspects of fund development (e.g., annual funds, capital campaigns, grants, major gifts, etc.). Kristin brings broad experience from social service, education, healthcare, and the arts, with clients ranging from grassroots, volunteer-driven initiatives to multi-million dollar institutions. Her commitment to supporting the nonprofit sector is exemplified by her service on various nonprofit boards and frequent trainings for local and national nonprofit audiences.

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