

# 2023 Development Key Performance Indicator's

2023	(Quarter 1)	(Quarter 2)	Quarter 3	Quarter 4	2023 Total	2023 Goal Fundraising	Difference	2022 Total
Time Frame:	1/1-3/31	4/01-6/30	7/1-9/30	10/1-12/31				
<b>Goal: \$706,000</b>						<b>\$706,000</b>		
Gifts Received \$	\$189,021				\$189,021			\$1,392,701
Less Covid grants					\$0			-\$846,959
<b>Total In:</b>	\$189,021	\$0	\$0	\$0	<b>\$189,021</b>			<b>\$545,742</b>
Missing Pledge *rec'd Jan 2023								\$117,333
<b>Total</b>	\$189,021	\$0	\$0	\$0	<b>\$189,021</b>	<b>\$706,000.00</b>	<b>\$516,979.34</b>	<b>\$663,075</b>
<b>% of 2022 Goal</b>					<b>26.8%</b>			<b>99.9%</b>
Gifts Received #	106				106			750
Donor Count								503
Grants								12
<b># New Donors Yearly</b>								201
<b>Donor Retention % Yearly (avg 45%)</b>								46%
<b>Annual Appeal</b>								\$40,374.00

# Planned Giving Program Key Performance Indicator's

2022	(Quarter 1)	(Quarter 2)	Quarter 3	Quarter 4	2023 Total	Prior Years	Grand Total	Average Estate Gift	Future Expectancies
WLS New Members	1				1	15	16		
WLS-Deceased	0	0	0	0	0	3	3		
WLS-Alive	1	0	0	0	1	12	13	\$40,000.00	\$520,000.00

WLS=WACOSA  
Legacy Society

Estate Gift Amount:					\$0	\$30,000	\$30,000		
General Endowment Amount					\$0	\$148,401	\$148,401		
Named Endowment Amount	\$86,240				\$86,240	\$14,955	\$101,195		
Grand Total Amount	\$86,240	\$0	\$0	\$0	\$86,240	\$193,356	\$279,596		

Estate Gifts						1	1		
General Endowment Gifts	0				0	8	8		
Named Endowment Gifts	4		0		4	15	19		
Grand Total Gifts	4	0	0	0	4	24	28		

					2023 YTD	Prior Year	\$ Growth	Distribution	Net Value
Endowment Fund Value*					\$228,099	\$139,693	\$88,406		\$228,099.00
Flexible-Endowment Fund Value*					\$30,483	\$29,815	\$668		\$30,483.00
Grand Totals-Endowment Funds*					\$258,582	\$169,508	\$89,074		\$258,582.00

\* Includes Investment Earnings

## 2022 Grant Update

Grants Pending	Date Submitted	Tentative Review Date	What is the grant for:	Amount Requested	Money Received	Money Denied	Money Due:
City of Waite Park	10/10/2022	Approved	Outdoor Lighting	\$4,000	Coming in 2023		\$4,000
CMCF Special Needs Grant	10/31/2022	10/1/2023	1st Avenue Toileting needs	\$11,400	\$11,400		
Shavlik Foundation	11/1/2022	4/1/2024	Computer Lab in South	\$14,500	\$14,500		
Operation Round-Up Stearns Electric	2/1/2023	3/15/2023	Supplies for clients to make outdoor benches	\$1,000	\$500	\$500	\$500
<b>Total:</b>				<b>\$30,900</b>	<b>\$26,400</b>	<b>\$500</b>	<b>\$4,500</b>