

## 2024 WACOSA Development Key Performance Indicators

	Qtr1	Qtr2	Qtr3	Qtr4	Total	Budget	Difference	2023 Totals	2023 Budget
General Donations	\$19,053					\$190,000		\$184,843	\$160,000
Grants	\$102,833					\$222,000		\$50,728	\$71,000
<b>Total General Op.</b>	<b>\$121,886</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$412,000</b>		<b>\$235,571</b>	<b>\$231,000</b>
Designated (APH)	\$199,107					\$300,000		\$167,575	\$375,000
Endowment	\$216,263					\$115,000		\$165,966	\$100,000
<b>TOTAL DONATIONS</b>	<b>\$537,256</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$827,000</b>		<b>\$569,112</b>	
Total # of Donations	83							847	
Donor Count	82							513	
New Donors	8							185	
Donor Retention								64%	

## 2024 Planned Giving Program Key Performance Indicator's

<b>WACOSA LEGACY SOCIETY</b>	Qtr1	Qtr2	Qtr3	Qtr4	Year Total	Prior Years	Grand Total	Average Estate Gift	Future Expectancies
WLS New Members	0				0	20	20		
WLS-Deceased	0				0	4	4		
WLS-Alive	0				0	16	16	\$40,000.00	\$640,000.00

WLS=WACOSA Legacy Society

### ENDOWMENT INFORMATION

<b>Estate Gift Amount:</b>					\$0	\$34,510	\$34,510		
<b>General Endow Amt*</b>					\$0	\$168,401	\$168,401	*Includes \$25,000 WACOSA donation to Flex Fund	
<b>Named Endow Amt</b>	\$216,263				\$216,263	\$163,220	\$379,483		
<b>Grand Total Amount</b>	\$216,263	\$0	\$0	\$0	\$216,263	\$366,131	\$582,394		
<b>Estate Gifts</b>						2	2		
<b>General Endow Gifts</b>					0	9	9		
<b>Named Endow Gifts</b>	3				3	31	34		
<b>Grand Total Gifts</b>	3	0	0	0	3	42	45		

### VALUES:

	2024 YTD	Prior Year	\$ Growth	Distribution	Net Value
<b>Endowment Fund Value*</b>		\$139,693	-\$139,693		\$0.00
<b>Flexible-Endowment Fund Value*</b>		\$29,815	-\$29,815		\$0.00
<b>Grand Totals-Endowment Funds*</b>		\$169,508	-\$169,508		\$0.00

* Includes Investment Earnings								
--------------------------------	--	--	--	--	--	--	--	--