Yearly Staff Evaluation Questions

Razor's Edge Instructions

Included in this manual are basic instructions on how to navigate Razor's Edge to answer certain questions in your Yearly Staff Evaluation.

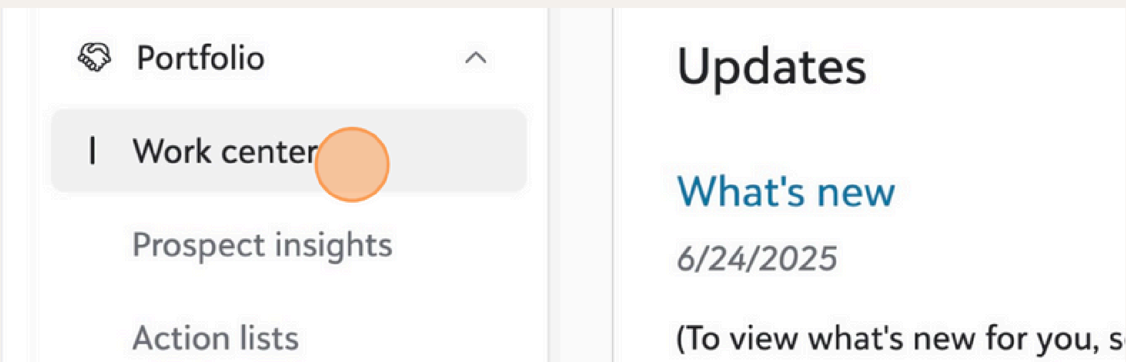
If the reports and lists mentioned in this manual are not under your RE profile, please follow the additional instructions in the back. These additional instructions will guide you in creating these lists and reports for future reference.

Yearly Staff Evaluation Questions

How many total names are in your database?

- STEP 1: Log into RE
- STEP 2: On the left side, drop the "Portfolio" menu down and select "Work Center"
- STEP 3: The number to the right of "Portfolio" is the total names in your database.

Example Below:



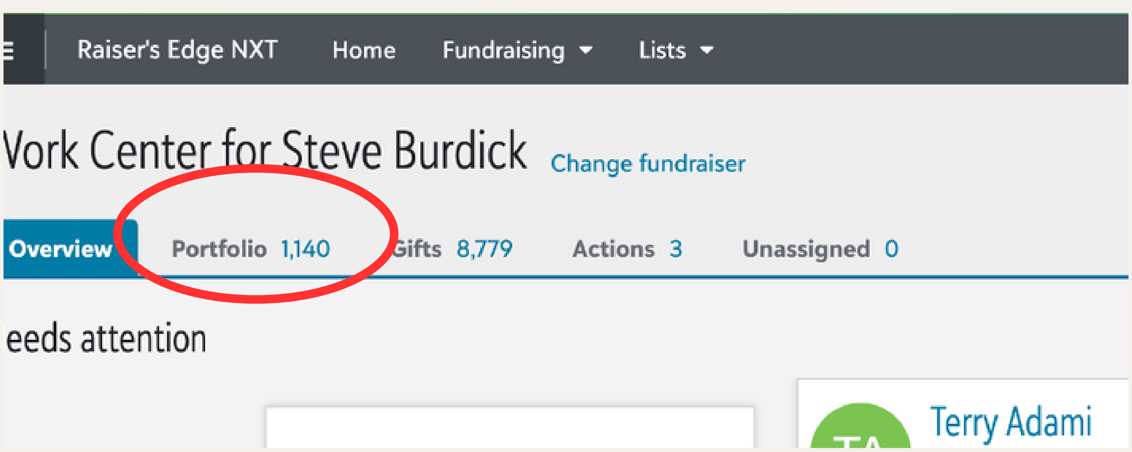


Image A

In this example, Steve has 1,140 names in his database

How much of increase or decrease since last year?

The only way to calculate this number is to compare it to the number on your previous years' Staff Evaluation. You cannot pull this number from RE.

How many total donors gave in the current fiscal year?

- STEP 1: Log into RE
- STEP 2: Drop the "Constituents" menu down, and select "Constituents List"

Example Below:

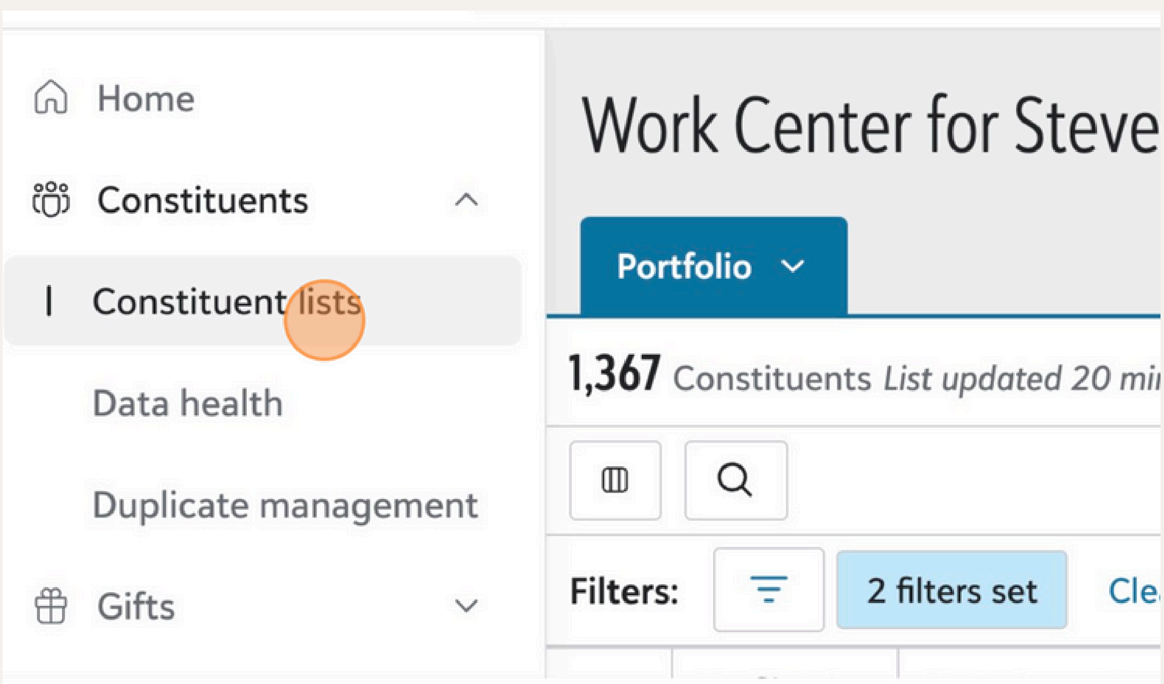


Image B

- STEP 3: Then click on the list called "Who Has Given This Fiscal Year". The total amount of donors who gave this fiscal year is on the top left and side once that list populates.

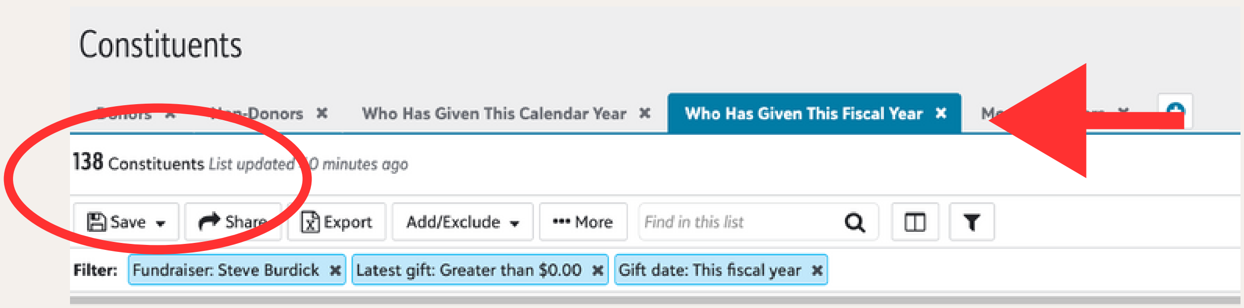


Image C

In this example, Steve had 138 donors who gave this fiscal year

*If you do not have this list under your RE profile, please see page 7 for instructions on how to set it up

How much of increase or decrease since last year?

There are a couple ways to calculate this number.

First, if you filled out a Staff Evaluation last year, simply compare this number to last years'. If you don't have that number handy, you'll have to run another list ("How many donors gave last fiscal year") in RE and then compare the two numbers. To run that list:

STEP 1: Navigate to the "Constituents List" tab as shown above in ***Image B***
STEP 2: Click on the tab labeled "Who Gave Last Fiscal Year"
STEP 3: Again, once the list populates, the total number of donors who gave will be on the top left. SEE BELOW.

Example Below:

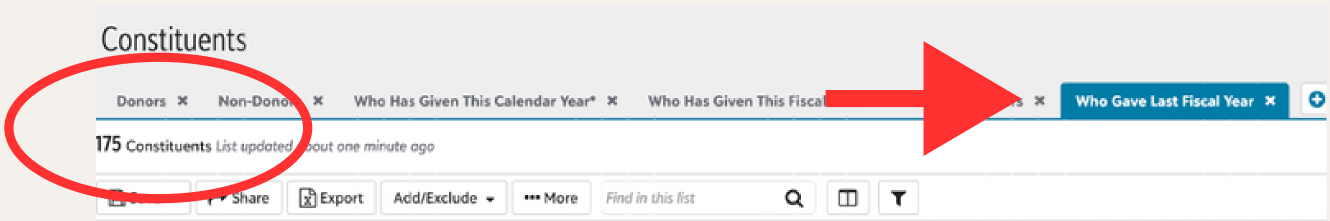


Image D

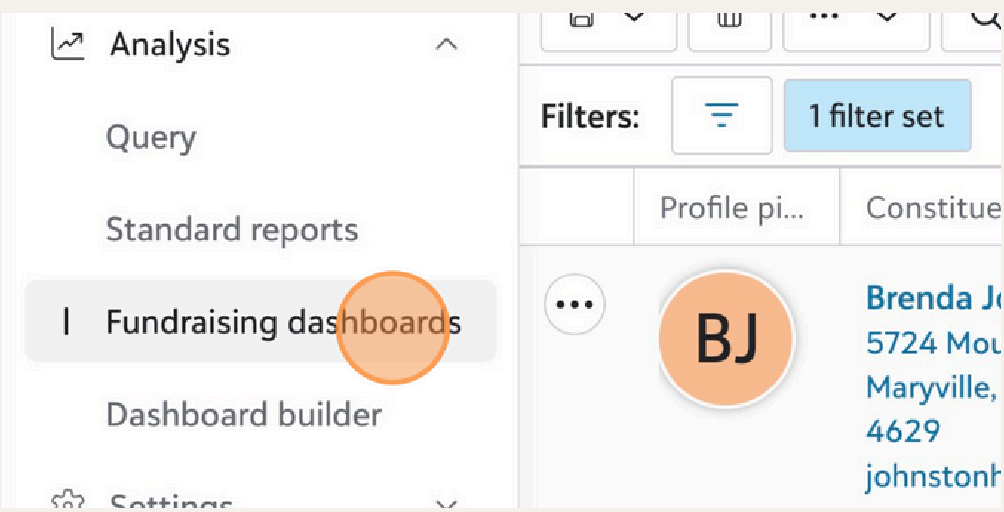
Compare this number to the pervious one. In this example, Steve has 175 donors in the previous year, meaning he had a decrease of 37 donors.

What is your donor retention rate?

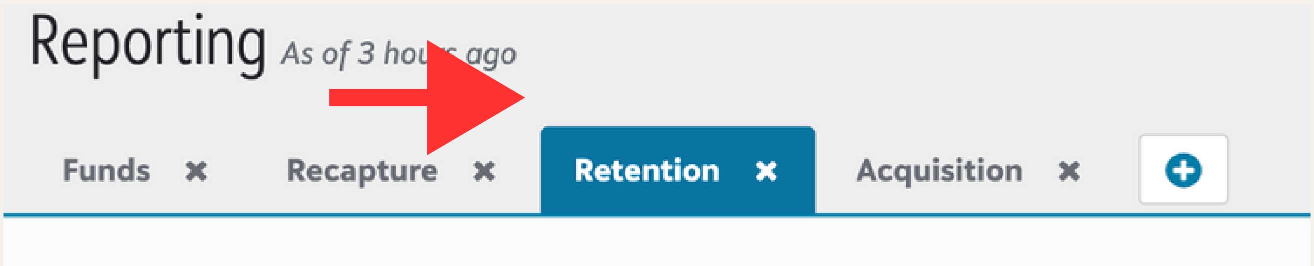
The "Donor Retention Rate" is how many of your current donors gave last fiscal year and this fiscal year. To find this number:

STEP 1: Drop the "Analysis" menu down, then select "Fundraising Dashboards"

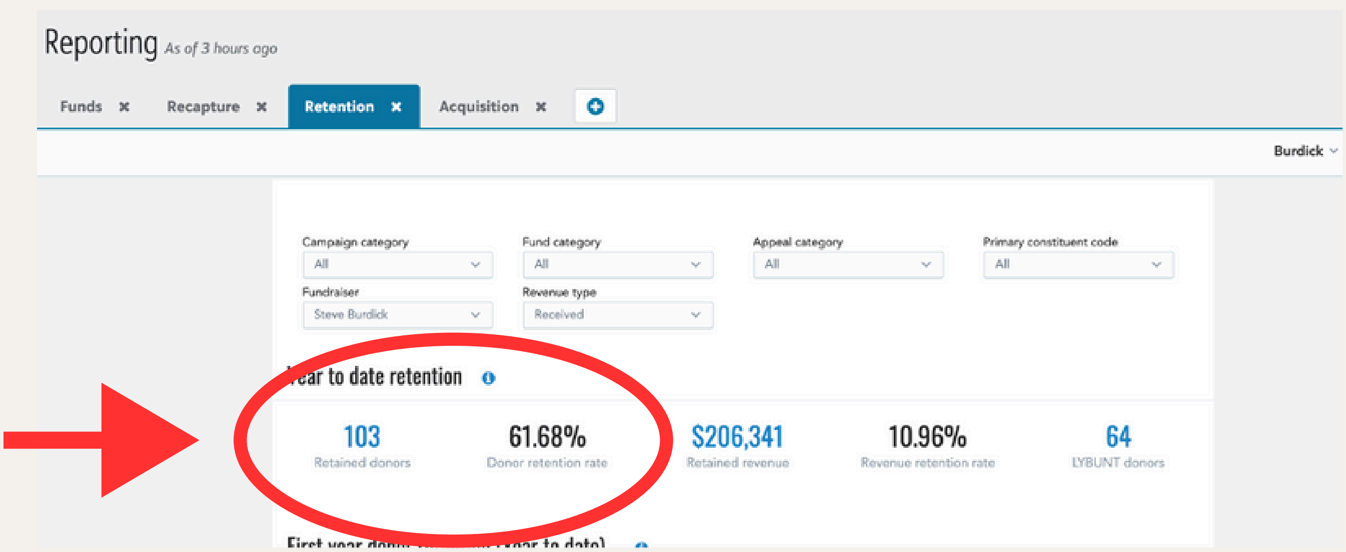
Example Below:



STEP 2: Select the "Retention" Tab at the top



STEP 3: Look towards the top of the report, under the "Year to date retention" section. The "retained donors" is the amount of people who gave last year and also this year. Make sure the Fundraiser is filtered by your name!



In this example, 103 or 61.68% is the "Retention Rate"

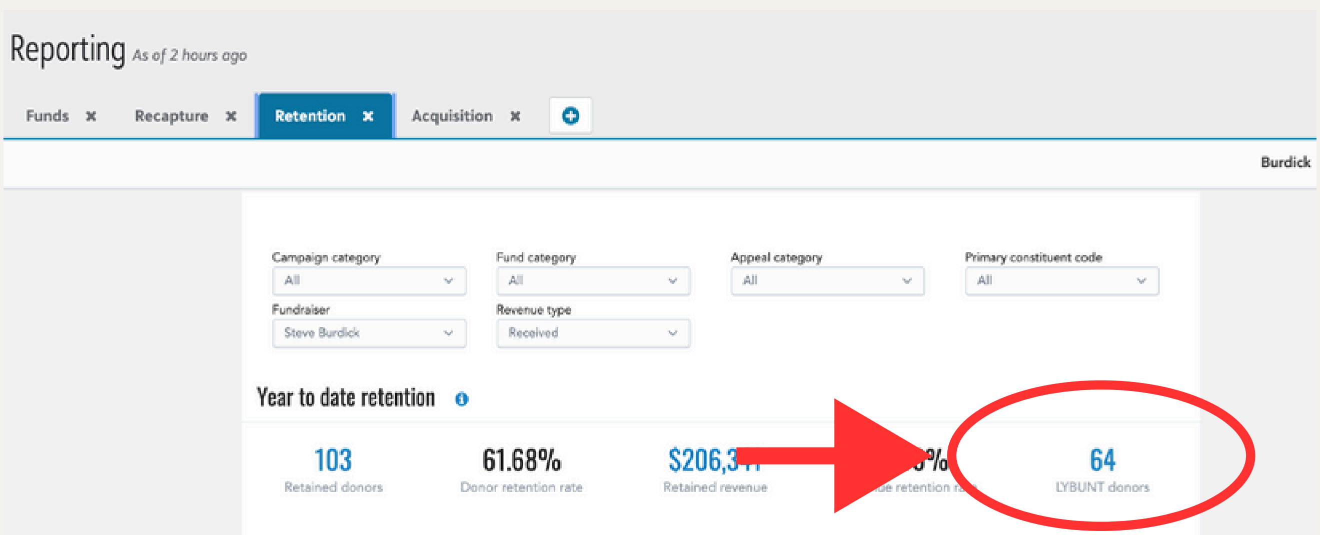
*If you do not have this list under your RE profile, please see page 9 for instructions on how to set it up

How many donors gave last year but unfortunately not this year (LYBUNT)?

To find out who gave Last Year, But Unfortunately Not This year, you are looking for the **LYBUNT** number. It's in the same "Retention" report as mentioned above.

STEP 1: Go back to the "Retention" tab. In the same "Year to date retention" section (towards the top of the report) you'll see on the right hand side, your LYBUNT number.

Example Below:



In this example, there are 64 people who gave last year but not this year. If you click on this number, a list will generate on the right hand side. Those are the donors Steve is referring to in the question.

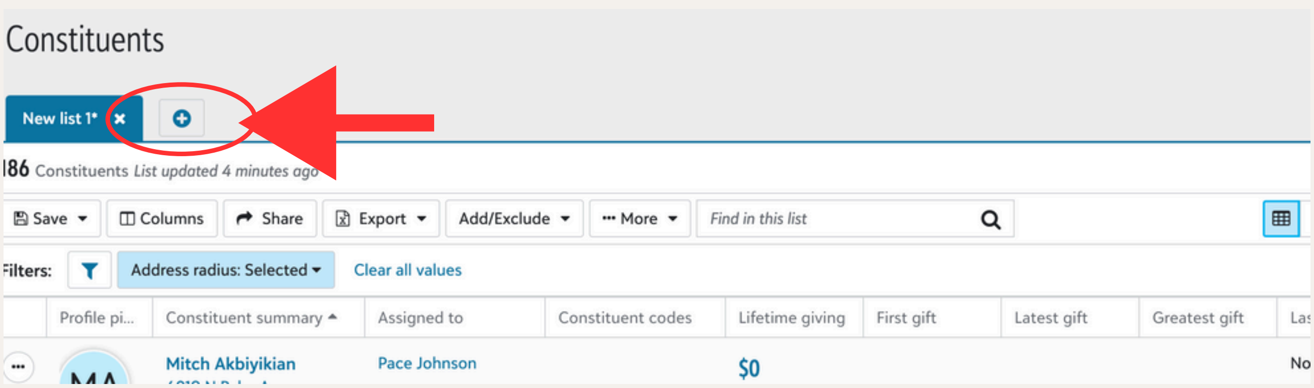
Additional Razor's Edge Instructions to Create Lists and Reports

Fiscal Year Lists

The first list we need to set up in RE is the "Who Gave This Fiscal Year" list. If you don't already see this tab under your account, follow these instructions to add it:

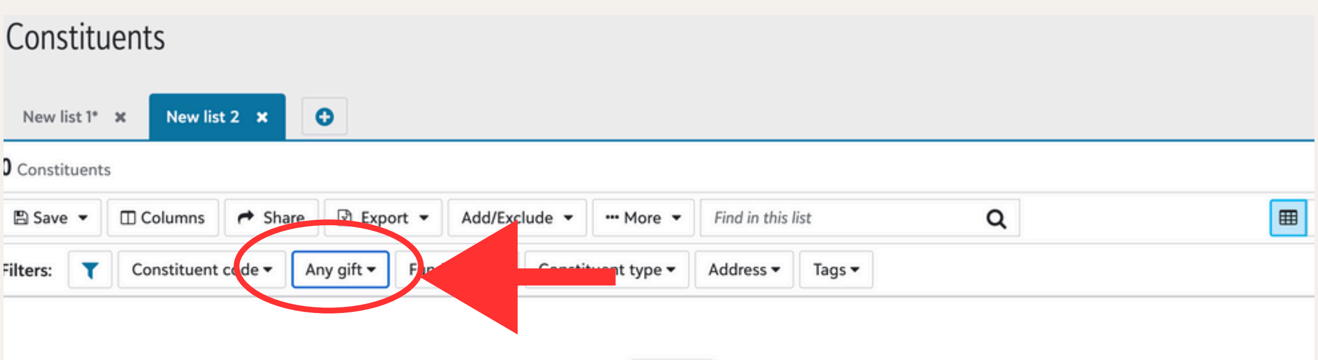
STEP 1: Under the dropdown menu "Lists", select "Constituents" see ***Image B***
STEP 2: Click the "+" to add a new list

Example Below:



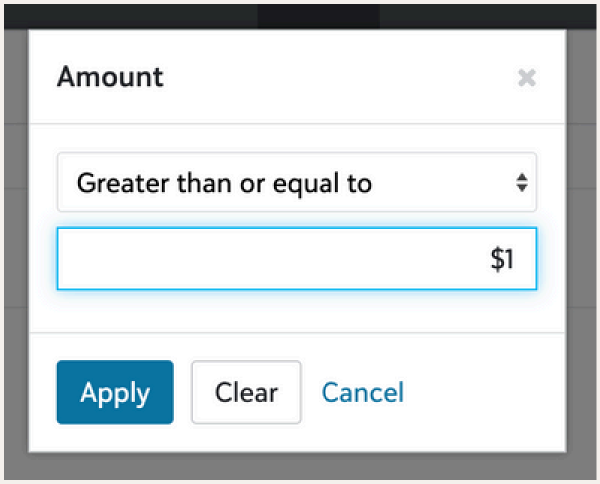
STEP 3: Select "Build a New List"
STEP 4: Click "Any Gift"

Example Below:

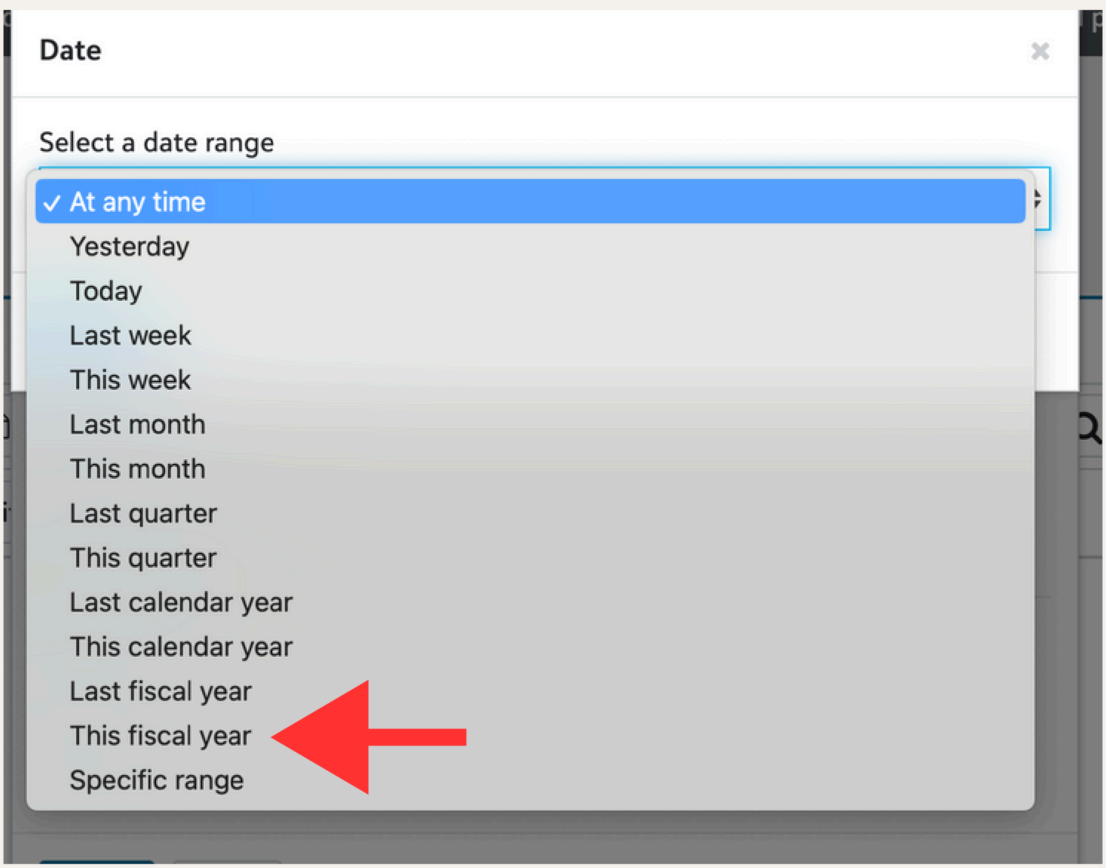


A menu will pop up. From here, we are going to select a few filters and then save the list for future reference.

STEP 1: Under "Amount", make sure it says "Greater than or equal to" and type in $1. Click Apply.



STEP 2: Next, click "Date" and from the drop down menu, select "This Fiscal Year". Click Apply.

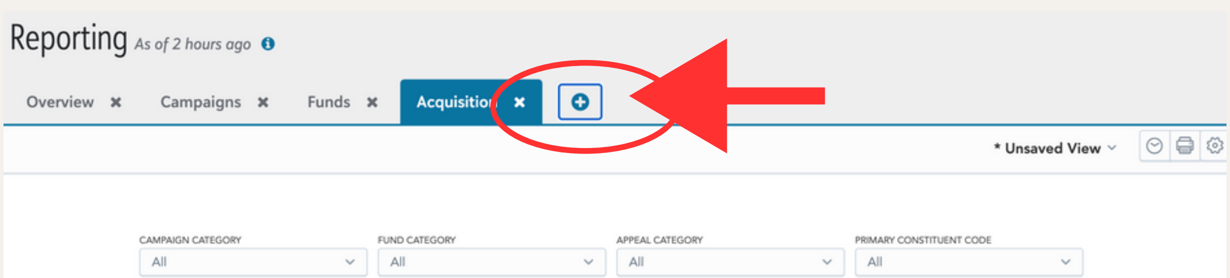


STEP 3: Lastly, click "Fund" and select your last name from the menu. Click Apply.
STEP 4: Once you have those 3 filters selected, click "Apply" one more time. This will run your report. Go back to page 3 **Image C** to find your donor number.
STEP 5: Save this list by clicking Save on left hand side. Save it as a new List and label it "Who Gave This Fiscal Year".

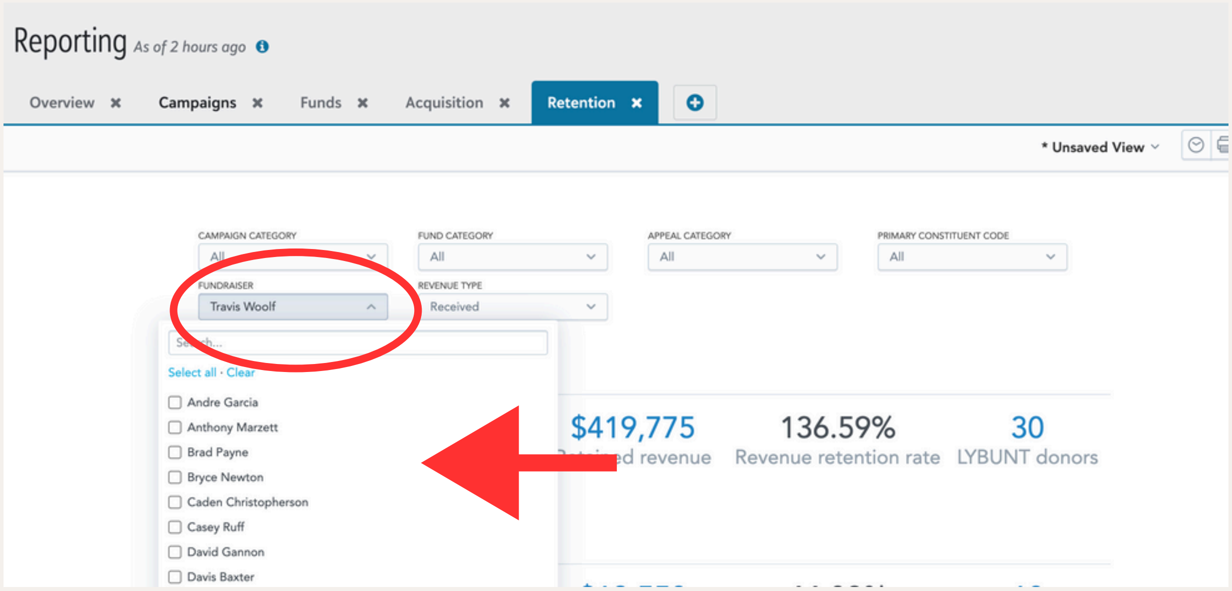
You will repeat this process to create the list for "Who Gave Last Fiscal Year" but in STEP 2, be sure to select the appropriate date range from the drop down menu.

Retention Tab

If you don't have the Retention Tab under your profile, here's how you set it up:
STEP 1: Go to the "Reporting" Tab as outlined on page 4.
STEP 2: Click the "+" sign to add the Retention Tab



A window will pop up. Simply scroll down until you see the check box for "Retention".
STEP 3: Check the box and click open
STEP 4: From there, select your name from the "Fundraiser" list



STEP 5: Click Apply
The numbers that populate will help answer the questions regrading your retention rate (page 4) and LYBUNT (page 6).

To save this report, click on "unsaved view" in the upper right hand and "save current view". Label it however you'd like.