Sample report. This document was generated against a Salesforce sandbox seeded with synthetic test data. All donor names, amounts, and activity shown here are fabricated for demonstration purposes. No real donor data is included.

Fundraising Intelligence Report

Organization: Helping Hands Food Bank
Fiscal Year: FY2026 (July 1, 2025 – June 30, 2026)
Analysis Date: 2026-04-28
Report Date: April 2026

1. Executive Summary

Overall Assessment: Needs Attention

Revenue is down 23.4% year-over-year (same window), driven by major donor attrition and the absence of anchor institutional donors from FY2025. Pipeline coverage against the remaining goal is strong (4.36x total, 2.47x weighted), providing a credible path to close FY2026 on plan — but only if $1.17M in Solicitation-stage pipeline converts by June 30. Board participation at 67% is below the 100% threshold required for foundation grant eligibility, and first-time donor retention at 22.3% remains below the 30% benchmark, threatening the long-term donor base. No single metric is in catastrophic territory, but the combination of revenue decline, donor count erosion (-13.7%), and four board non-participants creates compounding risk heading into FY2027.

Comparison: 2025-07-01 – 2026-04-15 vs 2024-07-01 – 2025-04-15

Key Metrics

METRIC	CURRENT	PRIOR	CHANGE
Total Revenue	$1,815,410	$2,368,900	-23.4%
Average Gift	$3,581	$3,725	-3.9%
Donor Retention (rolling)	26.3%	—	—
Pipeline (open)	$2,982,520	—	—
Pipeline (weighted)	$1,694,262	—	—
Monthly Recurring Revenue	$10,175	—	—
Annual Recurring Revenue	$122,100	—	—
Board Total Impact	$202,100	$233,830	-13.6%

2. Trajectory — Where Will We Land?

Goal: $2,500,000

SCENARIO	PROJECTION	VS GOAL
Conservative floor	$1,937,510	$-562,490 (-22.5%)
Current pace (linear)	$2,196,860	$-303,140 (-12.1%)
Weighted projection	$3,237,568	+$737,568 (+29.5%)

Linear note: $1,815,410 / 9.5 months elapsed × 12 months = ~$2.29M. Adjusted to $2.20M reflecting Q3 structural weakness.

Weighted note: Revenue to date ($1,815,410) + weighted pipeline closing by Jun 30 ($1,422,158 per spec 04). Assumes pipeline probability estimates are accurate and Q4 closes on schedule. This is optimistic given Cultivation-stage concentration.

3. Donor Retention by Segment

SEGMENT	CFY DONORS	CFY REVENUE	PFY SAME-WINDOW DONORS	PFY SAME-WINDOW REVENUE	RETENTION
Major Donor	35	$897,820	39	$1,011,220	53.8%
Mid Level	83	$266,630	64	$225,390	34.4%
Annual Fund	184	$59,230	216	$126,380	19.0%
First Time	—	—	—	—	22.3%
Recurring	—	—	—	—	—

Same-window comparison only; full-year retention will be materially higher as donors complete their giving cycle.

4. Revenue Analysis

Quarterly Distribution (CFY)

QUARTER	REVENUE	% OF GOAL	NOTE
Q1	$729,020	29.2%	FY Q1 (Jul–Sep)
Q2	$966,390	38.7%	FY Q2 (Oct–Dec)
Q3	$10,000	0.4%	FY Q3 (Jan–Mar)
Q4	$110,000	4.4%	Q4 partial — only Apr 1–15 captured in CFY to date

Revenue Concentration

- **Top donor (CFY):** Barr Foundation — $75,000 (4.13% of CFY total)

- **Top 10 donors (CFY total):** $551,010 (30.35% of revenue)
- **Assessment:** healthy

Institutional vs. Individual Revenue (CFY)

SOURCE	CFY REVENUE	GIFTS	ACCOUNTS	SHARE	SAME WINDOW PFY
Foundations, Corporations, Government	$980,800	54	47	54.0%	$1,338,900 (-26.7%)
Individual / Household	$834,610	453	446	46.0%	$1,030,000 (-19.0%)

Institutional revenue is down $358K year-over-year, the larger driver of the overall revenue decline. The mix has shifted slightly toward individuals (46% vs. 43.5% prior year), but absolute dollars are off in both categories.

5. Donor Movement

STATUS	COUNT	NOTE
Upgraded	0	No donors moved up a tier this year — suggests stewardship cadence isn't pushing mid-level donors toward major gifts.
Maintained	1	Only one donor giving at the same tier as PFY — unusually low; most active donors are giving less.
Downgraded	0	No active downgrades on record, but 200 lapsed accounts (below) effectively represent silent downgrades.
Lapsed	200	365+ days since last gift (last gift before 2025-04-15). Combined PFY value of these accounts: $736K at risk.
New (acquired)	1	Acquisition has stalled — only one new donor account this year vs. 30+ typical for an org this size. Likely tied to reduced annual fund and event activity.
Reactivated	11	Lapsed donors who returned with a gift this year — small but a positive signal for targeted reactivation outreach.

Net Movement

- Account change: -157
- Revenue change: $-616,720
- Acquisition rate: 0.077
- Attrition rate: 0.994

Lapsed Accounts — $736,720 at Risk

#	ACCOUNT	PFY REVENUE	MONTHS SILENT	NOTE
1	The Boston Foundation	$96,000	—	
2	Fidelity Investments	$74,900	—	
3	Blue Cross Blue Shield MA	$44,300	—	
4	Yawkey Foundation	$52,000	—	
5	Donald Larson Household	$29,180	—	
6	Wellington Management Foundation	$29,000	—	
7	Hyams Foundation	$25,000	—	
8	Boston Community Bank	$21,800	—	
9	Eos Foundation	$22,000	—	
10	Suffolk Construction	$19,800	—	

6. Pipeline Health

Pipeline by Stage

STAGE	COUNT	VALUE	WEIGHTED	PROBABILITY	% OF PIPELINE	AVG DAYS IN STAGE
Prospecting	14	$283,820	$28,382	10%	9.5%	79
Qualification	2	$76,000	$7,600	10%	2.5%	137
Cultivation	9	$1,321,000	$660,500	50%	44.3%	77
Solicitation	11	$1,111,900	$833,925	75%	37.3%	51
Negotiation	4	$109,700	$87,760	80%	3.7%	70
Pledged	3	$80,100	$76,095	95%	2.7%	92

8. Capacity Analysis

- **Contacts with capacity rating:** 1219 of 1936 (62.97%)

High-Capacity Coverage by Tier

TIER	CONTACTS	TOTAL CAPACITY FLOOR	CURRENTLY GIVING BELOW FLOOR
Major ($25K+ capacity)	6	$150,000	4 of 6 (67%)
Principal ($10K+ capacity)	18	$180,000	13 of 18 (72%)
Mid-Level ($1K+ capacity)	256	$256,000	192 of 256 (75%)

Priority 1 — High Capacity + High Engagement (5)

DONOR	CAPACITY RATING	LAST GIFT	RECOMMENDED NEXT MOVE
Sarah Johnson	$25K–$50K	$5,000 (Feb 2026)	Cultivation visit; introduce campaign case for support.
Mary Taylor	$25K–$50K	$2,500 (Mar 2026)	Personalized impact update; invite to leadership briefing.
Madison Carter	$10K–$25K	$1,000 (Jan 2026)	Stewardship call; propose ask at $10K range.
Fred Becker	$10K–$25K	$2,000 (Apr 2026)	Schedule meeting with ED; align on giving priorities.
Grace Flynn	$10K–$25K	$1,500 (Mar 2026)	Send program report; cultivate toward leadership-level gift.

Priority 2 — High Capacity, Low Engagement (7)

High-potential prospects who need a relationship investment.

- **Donald Larson** — capacity $25K+, last gift $500 in 2024 · needs a relationship-building outreach.
- **Kathryn Lopez** — capacity $10K–$25K, no gift in 18 months · warm reintroduction recommended.
- **Charles Shapiro** — capacity $25K+, $1,000 lifetime · significant under-giver; assign to gift officer for cultivation.
- **Raymond Larson** — capacity $10K+, attended event but no follow-up · schedule discovery call.
- **Gerald Goldstein** — capacity $25K+, board-connected, no direct ask history · high-value introduction needed.
- **Ronald Fitzgerald** — capacity $10K–$25K, $250 last gift · under-giving relative to capacity.
- **Thomas McCarthy** — capacity $10K+, recent first-time gift · cultivate toward second gift at higher level.

Lapsed High-Capacity Donors (7)

- **Total capacity gap (at floor):** $95,000

9. Board Participation

- **Total board:** 12
- **Participation rate (CFY):** 0.6667
- **Gave CFY:** 8 of 12
- **Direct giving:** $202,100
- **Affiliated giving:** $0

⚠ **Grant eligibility:** Board participation is currently 67% (8 of 12 members). Many foundation grant applications require 100% board participation as a condition of funding. For Helping Hands Food Bank, this is most immediately relevant to the Kids Backpack Expansion ($400K goal) and any grant applications under the Grants & Foundations channel (FY2026 goal: $400K). Jennifer Martinez (Development Director) should assess which pending or prospective grant applications have a 100% board participation requirement and prioritize re-engaging the 4 non-participants — Donald Larson, Gerald Goldstein, Kathryn Lopez, and Raymond Larson — before those applications are submitted.

Non-Participants (4)

Board members with no CFY giving. 100% participation is required for many foundation grants.

- **Donald Larson** —

- **Gerald Goldstein** —
- **Kathryn Lopez** —
- **Raymond Larson** —

Board Stretch Candidates (4)

Board members whose recent giving suggests upgrade capacity.

- **Kathryn Lopez** —
- **Donald Larson** —
- **Terry Kim** —
- **Charles Garcia** —

11. Concentration Risk

- **Top donor:** 4.13% of CFY revenue
- **Top 5 donors:** 18.37% of CFY revenue

Top 5 Donors (CFY)

RANK	DONOR	CFY AMOUNT	% OF TOTAL	TREND
1	Barr Foundation	$75,000	4.13%	↑
2	Liberty Mutual Insurance	$71,800	3.95%	→
3	Highland Street Foundation	$66,000	3.64%	↑
4	Klarman Family Foundation	$63,000	3.47%	↓
5	State Street Corporation	$54,000	2.97%	↑

12. Hidden Revenue Opportunities

- **Downgraded Major:** 5 · est. —
- *Donors who gave $10K+ in PFY but have $0 or significantly reduced CFY giving. Includes The Boston Foundation (lapsed $96K→0), Fidelity Investments (lapsed $74.9K→0), Yawkey Foundation (lapsed $52K→0), Donald Larson ($29.2K→0), Kathryn Lopez ($14.9K→0).*
- **High Capacity Low Giving:** 5 · est. —
- *Donors with Major or Principal capacity ratings who are giving at or below 50% of their capacity floor. Sarah Johnson (household): Major capacity, giving $15K vs $25K+ floor. Logan Perez: giving $25.1K at Major floor — candidate for $50K+ ask.*
- **Flat Givers:** 10 · est. —
- *Long-tenure recurring donors (2+ years) giving at Annual Fund levels ($25-$75/month). Top candidates for mid-level upgrade asks.*
- **Warm Lapsed:** 7 · est. —

- *Lapsed high-capacity donors (11-17 months since last gift) who are still receiving stewardship touches and showing engagement signals. Ronald Fitzgerald (17.3 months), Raymond Larson (15 months), Charles Shapiro (14.2 months), Kathryn Lopez (13.2 months), Gerald Goldstein (12.3 months) are all in the risk window (11-18 months per org-context lapsed definition).*
- **Unassigned High Value:** 1 · est. —

13. Benchmark Comparison

🔴 Critical

- **Recurring Churn Tracking** — Not tracked — 0 cancelled records in Salesforce *(benchmark: <5% monthly churn)*
- **Donor Count Decline** — -13.7% YoY *(benchmark: Growth or flat)*

🟡 Warning

- **YoY Revenue Change** — -23.4% *(benchmark: ≥5% growth)*
- **Overall Donor Retention** — 26.3% (early window) *(benchmark: 45%+)*
- *Early-window metric — full-year rate will be higher*
- **Major Donor Retention** — 53.8% (early window) *(benchmark: 85%)*
- **First-Time Donor Retention** — 22.3% *(benchmark: 30%)*
- **Board Participation** — 67% *(benchmark: 100%)*
- **Average-to-Median Recurring Gift Gap** — 69.6% *(benchmark: <30%)*

🟢 On Track

- **YoY Revenue Growth vs Goal** — 72.6% of goal achieved with pipeline coverage
- *On track to meet $2.5M goal based on weighted pipeline*
- **Pipeline-to-Remaining-Goal (total)** — 4.36x *(benchmark: 3x)*
- **Pipeline-to-Remaining-Goal (weighted)** — 2.47x *(benchmark: 1.5x)*
- **Stalled Opportunities** — 16.3% *(benchmark: <20%)*
- **Top Donor Concentration** — 4.13% (top donor) *(benchmark: <15%)*
- **Mid-Level Retention** — 71% (org-context) *(benchmark: 70%)*

14. Priority Actions — Top 15

Ranked by impact toward your fundraising goal. Each action ladders up to closing your revenue gap.

#	DONOR	ACTION	STATUS	IMPACT	OWNER
1	The Boston Foundation	Jennifer Martinez to schedule in-person meeting this week. Pipeline shows $301K upgraded a	Lapsed major institutional — last gift $96K (Mar 2025, 392 d	$301,000	Jennifer Martinez
2	Fidelity Investments	Immediate solicitation follow-up on $347K Solicitation opportunity (close date Jun 30). Co	Lapsed major institutional — last gift $74.9K (Mar 2025, 403	$429,000	Jennifer Martinez
3	Yawkey Foundation	Follow up on Solicitation-stage ask immediately. Renewal is overdue — confirm submission s	Lapsed major foundation — last gift $52K (Apr 2025, 443 days	$189,000	Jennifer Martinez
4	Blue Cross Blue Shield MA	Two open solicitations ($60K + $151K) require immediate follow-up. Renewal is 2+ months pa	Lapsed major corporate — last gift $44.3K (Feb 2025, 437 day	$211,000	Jennifer Martinez
5	Kathryn Lopez	Executive Director Sarah Johnson to call personally before next board meeting. Re-engage w	Board member — no CFY gift. Last gift $14.9K (May 2025, 13+	$46,490	Sarah Johnson
6	Donald Larson	Sarah Johnson personal call this week. Reactivation window is closing — 18-month lapse thr	Board member — no CFY gift. Last gift $29.2K (Jan 2025, 14.9	$36,490	Sarah Johnson
7	Cummings Foundation	Move from Cultivation to Solicitation before May 15. Renewal is imminent — prepare grant a	Lapsed major foundation — last gift $72K (Apr 2025). $151K i	$151,000	Jennifer Martinez
8	Sarah Johnson (board member / donor)	Immediate upgrade solicitation to $25K–$35K. All signals are green — recent gift, event at	Major capacity donor — CFY giving $15K (below $25K+ capacity	$25,000	Sarah Johnson (ED — self-managed or Board Chair)
9	Blue Cross Blue Shield Foundation (stalled pledge)	Immediate collection follow-up. This gift is pledged and overdue. Jennifer Martinez to con	Pledged $52K — stalled 137 days, close date was Dec 25, 2025	$52,000	Jennifer Martinez
10	Wellington Management Foundation	Immediate outreach — renewal is 3 months past due with no pipeline entry. Jennifer Martine	Lapsed — last gift $29K (Jan 2025, 443 days ago). No CFY gif	$29,000	Jennifer Martinez
11	Raymond Larson	Jennifer Martinez (Development Director) to contact for both board gift and pipeline resol	Board member — no CFY gift. Last gift $12.2K (Mar 2025, 13+	$29,000	Jennifer Martinez
12	Ronald Fitzgerald	Final reactivation window. Jennifer Martinez to call this week with urgency — 'last chance	Near-lapsed — 17.3 months since last gift ($10K, Jan 2025).	$18,000	Jennifer Martinez
13	Thomas McCarthy	Escalate to personal call — lapsed donor reactivation strategy. Consider new program angle	Formally lapsed — 19 months since last gift (Nov 2024, $10K)	$19,100	Jennifer Martinez

#	DONOR	ACTION	STATUS	IMPACT	OWNER
14	Frances Martinez (stalled pledge)	Contact Frances Martinez to arrange pledge payment before June 3 close date. This is a col	Board member who gave CFY ($15.8K). Separate stalled Pledged	$18,100	Jennifer Martinez
15	Hyams Foundation	Immediate outreach — 2+ months past renewal date with no pipeline. Jennifer Martinez to ca	Lapsed — last gift $25K (Feb 2025, 436 days ago). No CFY gif	$25,000	Jennifer Martinez

Priority Actions Quick Stats

- **Lapsed Institutional Recovery:** 8
- **Board Re Engagement:** 4
- **Stalled Pipeline Resolution:** 3
- **Upgrade Solicitation:** 3
- **Recurring Upgrade:** 2

15. Growth Opportunities

Lapsed Institutional Recovery — $748.8K at Risk, $512K in Active Pipeline

22 institutional funders representing $748,800 in prior-year revenue have no CFY closed gift, with renewals due within 6 months. Eight of these have active pipeline coverage totaling over $1.1M in asks (often upgraded amounts). The top 5 — The Boston Foundation ($301K pipeline), Fidelity Investments ($429K pipeline), Yawkey Foundation ($189K), BCBS MA ($211K), Cummings Foundation ($151K) — are all in active Solicitation or Cultivation. Converting these pipeline opportunities is the single highest-leverage action for FY2026 close.

Major Gift Upgrade Candidates — $70K+ in Near-Term Upgrade Potential

Five donors are giving significantly above their rated capacity floor and are primed for formal upgrade asks: Madison Carter ($29K, giving 2.9x Principal floor), Fred Becker ($28K, giving 2.8x floor), Donald Sullivan ($24K, 2.4x floor), Harry White ($24K, 2.4x floor), and Sarah Johnson ($15K, identified as ready for $25K+ solicitation). These donors have high engagement scores (5-8 touches in 180 days) and recent gifts. A coordinated upgrade campaign targeting this group could yield $35K–$70K in incremental CFY revenue and establish giving levels that carry into FY2027.

Board Re-engagement — $75K+ Revenue Recovery + Foundation Grant Eligibility

Four board members (Kathryn Lopez, Donald Larson, Raymond Larson, Gerald Goldstein) have made no FY2026 gift, representing an estimated $75K–$100K in recoverable board giving based on their PFY patterns. More critically, 67% board participation puts the organization below the 100% threshold required by most foundations for grant eligibility — directly threatening the $400K grants goal managed by Jennifer Martinez. Re-engaging these four donors before the fiscal year ends unlocks grant access in addition to direct revenue.

16. Risks

Pipeline Concentration in Solicitation Stage — $1.17M Must Close by June 30

The remaining goal of $684,590 appears covered by weighted pipeline at 2.47x — but $1.17M of total pipeline sits in Solicitation with a June 30, 2026 close date, and four of the largest opportunities (Fidelity $347K, United Way $154K, Yawkey $189K, BCBS MA $151K) were only entered into Salesforce in late April. If even two of these Solicitation-stage opportunities miss the fiscal year, the weighted coverage drops below 1.5x and the annual goal is at risk.

Board Participation at 67% — Foundation Grant Eligibility at Risk

Four of 12 board members (Donald Larson, Kathryn Lopez, Raymond Larson, Gerald Goldstein) have made no FY2026 direct gift. Most foundation grantmakers require 100% board giving as a condition of funding, and HHFB has a $400K grants channel goal. With board participation down from 83% PFY to 67% CFY, the organization's eligibility for institutional grants — including pending renewals from foundations in the $10K–$96K range — is compromised if not remediated before fiscal year end.

Donor Count Erosion — 13.7% Fewer Donors YoY Threatens FY2027 Base

CFY donor count is 493 vs 571 in the PFY same window — a loss of 78 donors (13.7% decline). First-time donor retention at 22.3% is below the 30% benchmark, and 200+ accounts are lapsed in the movement analysis. While revenue is partially buffered by larger average gifts among retained donors, the shrinking donor base reduces the organization's FY2027 starting position and increases dependence on a smaller group of major donors.

17. Strategic Recommendations

Immediate (next 30 days)

- **Resolve All 7 Stalled Pipeline Opportunities** — 7 stalled opps (16.3% of pipeline) with past-due close dates distort pipeline health metrics and represent real cash flow risk heading into fiscal year end. Blue Cross Blue Shield Foundation's $52K pledged gift is 4+ months past due.
- **Board Re-engagement Campaign — Four Non-Participants** — 67% board participation is below the 100% threshold required by most foundations. With $400K in grants on the line, every non-participating board member is a direct financial risk. Kathryn Lopez gave $46.5K in full PFY — her non-participation is the single largest recoverable board revenue gap.
- **Accelerate Top-5 Institutional Pipeline Opportunities to Close by June 30** — These five funders represent $1.28M in open pipeline. Converting even three of them by June 30 closes the remaining $684K goal with room to spare. Without movement on these, the annual goal is at risk regardless of what else closes.

Short-term (next quarter)

- **Major Gift Upgrade Solicitations — Five Ready-to-Ask Donors** — These five donors are giving significantly above their rated capacity floors, have high engagement (5-8 touchpoints in 180 days), and have all given in CFY. The upgrade conversation is low-risk and high-return — these donors are already telling you they want to give more.
- **Implement Recurring Donation Cancellation Tracking in Salesforce** — All 120 recurring records show Open_Ended_Status__c = 'None' with zero cancellations recorded — this is a data gap, not a zero-churn reality. HHFB cannot calculate sustainer churn, identify reactivation candidates, or measure true recurring retention without cancellation tracking. The $122K ARR program is being managed blind.

- **First-Time Donor 90-Day Stewardship Series — Activate for All FY2026 New Donors** — First-time retention is 22.3% vs the 30% benchmark — for every 100 new donors acquired, HHFB loses 78 after their first gift. The stewardship standards in org-context specify 4 touches in 90 days for new donors including a personal call within 30 days. This standard is not consistently applied.

Medium-term (rest of FY)

- **Lapsed Donor Reactivation Campaign — 200+ Accounts, $736K Revenue at Risk** — The movement analysis shows 200+ lapsed accounts with $736K in prior revenue. The 10 named lapsed institutional accounts alone represent over $350K. A systematic reactivation effort targeting even 20% of lapsed major/mid-level donors could recover $100K–$150K for FY2027.
- **WealthEngine Integration Audit and Numeric Capacity Upgrade** — Capacity analysis (spec 06) found no numeric capacity field — only a categorical Capacity_Rating__c with four levels. This means gap analysis is limited to floor-based estimates, significantly understating true upgrade potential. With 63% of contacts rated and no numeric field, HHFB is leaving major upgrade opportunities undiscovered. The 3-year-old screening data (per org-context data quality note) further limits accuracy.
- **FY2027 Pipeline Development — Close the Qualification Gap** — The pipeline analysis shows a critical gap in the Qualification stage — prospects are either jumping stages or stalling before qualification conversations. Healthy pipeline requires 20-25% of opportunities in early stages (Prospecting/Qualification) to ensure FY2027 revenue coverage. The current 4.7% Qualification share is far below this benchmark.

Generated from live Salesforce data, the organization's configured context, and the fundraising intelligence knowledge base.
