

50+ USE CASES

NGO Analytics & Reporting Use Cases

50+ Analytics Use Cases for Not-for-Profit Organisations in Aotearoa
New Zealand and Australia

Version 1.0

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| AmplifyData.org.nz

Fundraising Analytics

Programme Outcomes

Volunteer Management

Financial Health

Governance

Marketing

Data Infrastructure

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A library of ready-to-use analytics use cases organised by functional area

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Analytics matters for NGOs and what's in this library

Why Analytics Matters for NGOs

In an increasingly competitive funding environment, data-driven decision making is no longer optional for not-for-profit organisations. Funders, boards, and stakeholders expect evidence of impact, efficiency, and good stewardship.

External Drivers

- Funders requiring outcome evidence and ROI
- Increased competition for funding
- Regulatory requirements (ACNC, Charities Services NZ)
- Public expectations for transparency
- Shift to outcomes-based commissioning

Internal Benefits

- Better resource allocation decisions
- Improved programme design and delivery
- Stronger case for funding applications
- Enhanced board governance and oversight
- Reduced operational costs

The NZ/AU NGO Context

27,000+

NZ REGISTERED CHARITIES

60,000+

AU REGISTERED CHARITIES

50+

USE CASES IN THIS LIBRARY

How to Use This Library

Identifying relevant use cases and assessing your data readiness

Getting Started

- 1 Identify Your Priority Area**
Fundraising, Programmes, Volunteers, Finance, Governance, Marketing, or Beneficiaries.
- 2 Select a Use Case**
Each section contains 6-10 specific use cases. Start with the most urgent business question.
- 3 Assess Data Readiness**
Check the data requirements for each use case. Identify which systems contain the needed data.
- 4 Implement and Iterate**
Start simple with available data. Improve data collection over time. Expand to additional use cases.

Prioritisation Framework

PRIORITY	CRITERIA	EXAMPLES
High	Required for compliance, board reporting, or major funding	Donor retention, financial health, programme outcomes
Medium	Supports strategic decisions, requested by stakeholders	Volunteer engagement, campaign ROI, service efficiency
Lower	Nice-to-have insights, future capability building	Predictive analytics, advanced segmentation, benchmarking

Data Maturity Levels

LEVEL 1: BASIC Spreadsheets, counts, trends	LEVEL 2: INTERMEDIATE CRM, ratios, segmentation	LEVEL 3: ADVANCED Predictions, attribution
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Raising & Donor Analytics

Use cases for understanding and growing your donor base

F1

Donor Retention Rate

What percentage of donors give again the following year?

KPIs

- Overall retention rate (%)
- First-time donor retention rate
- Multi-year donor retention rate
- Retained revenue (\$ and %)

NZ/AU Benchmarks

- Overall retention: 40-50% typical, 60%+ excellent
- First-time retention: 20-30% typical
- Multi-year retention: 60-80% typical

Hospice NZ Member Organisation: "Tracking retention by acquisition source revealed donors acquired through community events had 65% retention compared to 28% for digital acquisition. We reallocated budget to community engagement, improving overall retention from 42% to 54% over two years."

F2

Donor Lifetime Value (LTV)

How much is a donor worth over their entire giving relationship?

Calculation: LTV = Average Gift x Gifts per Year x Average Donor Lifespan

Example: \$75 x 2.5 x 4 years = \$750 LTV

\$200-500

SMALL CHARITIES LTV

\$500-1.5K

MEDIUM CHARITIES LTV

\$1.5K-5K+

LARGE CHARITIES LTV

F3

Cost Per Dollar Raised (CPDR)

How efficient are our fundraising activities?

CHANNEL	REVENUE	COST	CPDR
Direct Mail	\$85,000	\$25,500	30c
Digital	\$42,000	\$6,300	15c
Events	\$38,000	\$22,800	60c
Major Gifts	\$120,000	\$12,000	10c
Regular Giving	\$65,000	\$13,000	20c
TOTAL	\$350,000	\$79,600	23c

F4-F5

Gift Upgrade & Regular Giving Performance

Gift Upgrade KPIs

- Upgrade rate: 15-25% typical
- Downgrade rate: 10-20% typical
- Net upgrade: 5-10% positive growth

Regular Giving KPIs

- Monthly attrition: 1-2% good, 3-4% concerning
- Annual attrition: 15-25% typical
- Failed payment recovery: 30-50%

F6-F8

Lapsed Donors, Campaign Performance & Grant Pipeline

USE CASE	KEY QUESTION	TOP KPI
F6: Lapsed Reactivation	Which lapsed donors are most likely to give again?	Reactivation rate by segment
F7: Campaign Performance	How effective are our campaigns?	ROI and response rate
F8: Grant Pipeline	What is our grant success rate?	Success rate by funder type

Community Foodbank NZ: *"Pipeline analytics showed success rate with gaming trusts was 72% vs 28% with corporate foundations. We reallocated staff time to gaming trust relationships, increasing grant revenue by 35% while reducing applications."*

Programme & Service Delivery Analytics

cases for tracking reach, outcomes, completion, costs, and dosage

P1

Service Reach and Coverage

How many people are we reaching, and who are they?

2,847

TOTAL PARTICIPANTS

12,456

SERVICE CONTACTS

4.4

AVG
CONTACTS/PERSON

127

ON WAITLIST

P2

Programme Outcomes Achievement

Are participants achieving the intended outcomes?

OUTCOME	TARGET	ACTUAL	STATUS
Developed job-ready CV	95%	98%	On target
Completed work experience	80%	82%	On target
Increased confidence	85%	91%	On target
Gained employment (6m)	70%	68%	Monitor
Total positive destination	75%	78%	On target

Youthline NZ: "Outcome tracking showed 78% of young people showed improved wellbeing (K10 scores), but analysis by service type revealed face-to-face counselling achieved 85% improvement versus 65% for text-based support."

P3

Service Completion and Dropout

Are participants completing our programmes, and why do some leave early?

Benchmarks (by programme type)

- Education/training: 60-80% completion
- Counselling/therapy: 50-70%
- Case management: 40-60% planned exit

Top Dropout Reasons

- Employment gained (positive): 25%
- Personal circumstances: 22%
- Transport/access issues: 18%
- Not meeting expectations: 15%

P4-P6

Cost Per Outcome, Service Dosage & Waitlist Analytics

USE CASE	KEY QUESTION	KEY INSIGHT
P4: Cost Per Outcome	How much does each outcome cost?	Cost per participant vs per completer vs per outcome
P5: Service Dosage	Is more service = better outcomes?	Outcomes improve up to 15 hours, then plateau
P6: Waitlist Analytics	How long do people wait?	Track conversion rate and wait time trends

Volunteer Management Analytics

Use cases for engagement, retention, valuation, and role matching

V1

Volunteer Engagement Dashboard

How engaged is our volunteer workforce?

245

ACTIVE VOLUNTEERS

4,850

HOURS THIS QUARTER

\$169K

VALUE @ \$35/HR

4.3/5

SATISFACTION

V2

Volunteer Retention Analysis

How long do volunteers stay, and why do they leave?

BENCHMARK	TYPICAL RANGE
Year 1 retention	40-60%
Year 2+ retention	70-85%
Average volunteer lifespan	2-4 years

V3

Volunteer Hours Valuation

What is the economic value of volunteer contributions?

ROLE	HOURS	RATE	VALUE
Service delivery	12,450	\$35/hr	\$435,750
Governance/Board	1,200	\$100/hr	\$120,000
Professional	680	\$150/hr	\$102,000
Events	2,100	\$35/hr	\$73,500
Admin support	1,850	\$35/hr	\$64,750
TOTAL	18,280		\$796,000

St John NZ: "Volunteer hour valuation showed 8,500 volunteers contributed \$42 million in service value annually. This data was critical in funding negotiations and public advocacy for volunteer support services."

Finance & Resource Analytics

Financial health, programme costs, cash flow, and revenue sustainability

FN1

Financial Health Dashboard

What is the overall financial health of our organisation?

METRIC	NZ/AU BENCHMARK
Cash reserves	3-6 months recommended
Current ratio	1.5-2.0 healthy
Overhead ratio	15-25% typical for NGOs
Revenue diversification	No single source >40%

FN2

Programme Cost Analysis

What does it cost to run each of our programmes?

PROGRAMME	TOTAL COST	REVENUE	MARGIN	COST/PARTICIPANT
Youth Support	\$310K	\$285K	-\$25K	\$1,550
Family Services	\$228K	\$260K	+\$32K	\$1,425
Community Ed	\$107K	\$95K	-\$12K	\$178
Counselling	\$265K	\$290K	+\$25K	\$883

Cash Flow Forecasting & Revenue Sustainability

Cash Flow KPIs

- Current cash position
- Projected cash position (weekly/monthly)
- Days to minimum cash threshold
- Forecast accuracy

Revenue Sustainability Indicators

- Single source >50% = HIGH risk
- Multi-year contracts <30% = MEDIUM risk
- No source >30% = POSITIVE
- Growing individual giving = POSITIVE

Governance & Compliance Analytics

effectiveness, compliance tracking, and risk management

G1

Board Effectiveness Dashboard

How effective is our board governance?

- **KPIs:** Meeting attendance rate, committee attendance, board diversity, strategic plan progress, risk register status
- **Data sources:** Meeting minutes, attendance records, board composition data, strategic plan tracking
- **Benchmarks:** 80%+ meeting attendance, board diversity reflecting community served

Additional Governance Use Cases

- **G2: Compliance Tracking** -- Are we meeting all regulatory and contractual obligations?
- **G3: Risk Management Dashboard** -- What are our top risks and how are they being managed?
- **G4: Policy Review Tracker** -- Are our policies current and reviewed regularly?

Data Infrastructure Guide

Building the data foundation for effective analytics

Common NGO Data Systems

FUNCTION	COMMON SYSTEMS (NZ/AU)
Accounting	Xero, MYOB, QuickBooks, Sage
CRM/Donor Management	Salesforce NPSP, Blackbaud, Beacon, ThankQ
Case Management	CIMS, Penelope, Link2, Salesforce
Volunteer Management	Better Impact, Volunteer Hub, Rosterfy
Email Marketing	Mailchimp, Campaign Monitor, eDMs
Website Analytics	Google Analytics, Hotjar

Data Quality Checklist

- Data validated at source with calculations verified
- Missing data identified and explained
- "As of" date clearly displayed, update schedule documented
- Definitions standardised and time periods aligned
- Data sources noted and methodology documented
- Limitations acknowledged transparently

Implementation Roadmap

- 1 Foundation (Months 1-3)**
Audit current data, clean core datasets, implement basic reporting on high-priority use cases.
- 2 Expansion (Months 4-6)**
Connect data systems, build dashboards, train staff on data entry and interpretation.
- 3 Optimisation (Months 7-12)**
Automate reporting, add medium-priority use cases, refine based on user feedback.

4**Advanced (Year 2+)**

Predictive analytics, benchmarking, advanced segmentation, culture of data-driven decisions.

Key Success Factors

- Executive sponsorship -- leadership must champion data use
- Start small and demonstrate value before scaling
- Invest in data quality before visualisation
- Build internal capability, don't just outsource
- Celebrate wins and share insights widely

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This library is provided as a general resource for not-for-profit organisations in Aotearoa New Zealand and Australia.