

WORKSHEET

5 Pillars of Annual Giving

Use this worksheet to establish your "5 Pillars of Annual Giving" that will help you tell a story in the next report you give. Go on a treasure hunt in your database and see what stories you can tell with the data.

LEAD GENERATION

Research 5 donors who have given over \$100,000 lifetime or \$25,000 in a single gift. Identify when they gave their first gift, how much it was for, and whether it came from the annual fund.

Make notes below:

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DOLLARS AND DONORS

Total \$\$ raised by annual fund (fulfilled) last year:

Total \$\$ raised by annual fund (fulfilled) last 5 years together:

Total \$\$ raised by annual fund (fulfilled) last 5 years average:

Total number of gifts made through annual fund last year:

Total number of gifts made through annual fund last 5 years together:

Total number of gifts made through annual fund last 5 years (average):

ACQUISITION

New donors acquired by annual fund last year:

New donors acquired by annual fund last 5 years together:

New donors acquired by annual fund last 5 years (average):

PUBLIC RELATIONS

Total Number of conversations (contacts) held by the annual fund:

Stewardship calls completed by annual fund:

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DATA ENRICHMENT

Number of addresses updated by annual fund:

Number of emails acquired by annual fund:

Number of emails corrected or updated by annual fund:

Employment and Business info collected by annual fund:

Cell phone numbers identified or acquired by annual fund:

Addresses updated by data research process for annual fund:

Cell Phones identified and marked by data research process for annual fund:

Phone numbers acquired by data research process for annual fund:

Cell phones acquired by data research process for annual fund:

Bad Numbers/Disconnects identified by annual fund:

Deceased identified by annual fund: