

Fundraising Planning Worksheet

Identifying and Assessing Potential Donors

Useful Information	PowerBase	What do WE need?
Donors who gave last year but not this year: 1) Number of donors and total given 2) Names segmented by giving levels, previous solicitor, contribution type, and/or method of contact	LYBUNT Report Advanced Search: Summary Fields Advanced Search: Contributions by custom field Donor Responded to	
Lapsed donors to recover: 1) Number of lapsed donors and total given 2) Names segmented by giving levels, previous solicitor, contribution type, and/or method of contact	SYBUNT Report Advanced Search: Summary Fields Advanced Search: Contributions by custom field Donor Responded to	
This year's donors who could be asked again: 1) Number of current donors 2) Names segmented by giving levels, previous solicitor, contribution type, and/or method of contact	Donation Summary Report Advanced Search: Summary Fields Donor Report (Detail) Donation Summary Report (Repeat)	
Mid-level and major donors	Top Donors Report Advanced Search: Summary Fields Contribution History by Relationship Report Contribution Aggregate Custom Search	
Loyal Donors: Donors who have given 2+ (or more) consecutive years	Donation Summary Report (Repeat) Donor Report (Detail) Advanced Search and Search Builder	
Prospect List: Growth in internal prospecting list	Key Numbers Report	
Income, response rate and average gift on any similar past campaign	Mailing Reports for Campaign Activity Search for direct mail Campaign Contribution Search for Campaign Fundraising Dashboard for Campaign	
Prospective Team: Board members, members, and other constituents organized by their contact	Various	

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Implementing and Managing the Campaign

Useful Information	PowerBase Report	What do WE need?
Number of donations, total amount and donor names attributed to each solicitor	Soft Credit Report	
Number of donations and amount attributed to each contribution type	Donor Report (Summary)	
Donations by gift level: Where are your gaps? Where are you strong? Who should get an immediate and personal acknowledgement?	Donor Report (Summary)	
Donors who haven't yet given to the campaign sorted by solicitor	Repeat Contributions Report	

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Evaluating the Campaign

Useful Information	PowerBase Report	What do WE need?
Number of donations and total amount attributed to each solicitor	Soft Credit Report	
Number of donations, amount and gift average attributed to each contribution type: What were the results of fundraising on multiple channels?	Donor Report (Summary)	
Donations by gift level: How did the results match to your original gift chart?	Donation Report (Summary)	
Number and amount of donations by new, renewed or reactivated donors: Have you brought in new donors, are you closer to a 66% renewal rate for the year, and have you pulled lapsed donors back in?	Fundraising Dashboard for Campaign	
Conversion: Did people who gave to you for the first time last year give through this campaign?	Repeat Contributions Report	
Increased donations: How many donors gave more to the organization as a result of the campaign?	Repeat Contributions Report Fundraising Dashboard for Campaign	
Mid and Major Donors: Did your top donors give through this campaign? Anything more you can do?	Fundraising Dashboard for Campaign Repeat Contributions Report	
Loyal Donors: Did this campaign reach your loyal donors? Anything more you can do?	Repeat Contributions Report Fundraising Dashboard for Campaign	