Roman Catholic Foundation

Instructions for Extracting and Assessing Planned Giving Donors

This document includes instructions for extracting information from Servant Keeper 7 and analyzing the data using a 2013 or 2016 Microsoft Excel spreadsheet. The process is based on the Roman Catholic Foundation's Scoring Metric and includes all data EXCEPT the 'Engagement With Your Organization' category.

To ensure an accurate assessment of the donors, please review the Servant Keeper file and verify that all fields contain valid data for registered parishioners. Pay particular attention to the Age (which requires a birthdate to be entered) and Marital Status fields.

The assessment parameters include visitors. Visitor files normally do not include birthdates, marital status or children, therefore, scores for those families will be low.

Please direct questions regarding the procedure to Sally Serbus, Parish Support Manager, at 314.792.7716 or <u>sallyserbus@archstl.com</u>.

Creating the Donor List in Servant Keeper:

1. In the Servant Keeper Membership module, click on 'Groups Keeper'.



2 – To create the new group, click on 'Add Group'.

Smart Groups	Display Group						
Clc Add t Group G up	Copy Delete Display Group Group Group dd / Edit Groups Group	Brint roup List					
Double click on a group to	view that group or click on "Add	Group" to create a ne	w group				
Drag a column header here t	o group by that column					<u> </u>	Individual Group
	- <u>5</u>						(Member Status Equal to "Active Member" OR
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🌲 *Choir	No	Activity Groups	Public	ED	10/9/2001	=	
🚨 *Deacon	No		Public	MIKE	3/25/2010		
Several Sector 10 August 10 Augus	No	Mailing Groups	Public	ED	5/6/2004		
*Pastors Power Team	No	Activity Groups	Public	ED	10/9/2001		
Structure * Visitors	No	Attendance Groups	Public	ED	4/1/2002		
🔓 1st grade	No	Children & Youth	Public	MIKE	9/30/2013		
Sector 2009 cotribs	No		Public	MIKE	12/28/2009		
🔓 ACA	No		Public	SERVANT	9/7/2016		

3 – Enter 'Donor List' for the 'Group Name'; select 'Individuals' under 'Show'; select 'Show Individual Fields' under 'Show Field for:'.

4 – Enter the criteria as shown below. Add additional Member Status values as needed. Be sure to include () around the Member Status criteria and change all 'ANDS' to 'OR' within the parentheses.

5 – Click on 'Select Fields'.

Add/Edi	t Group	-			-	23						
Enter t	he Group Name	Show			Show Fields fo	r:						
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Add Cr	riteria: Repeat steps 1-4	as needed to build the group										
1. Se	1. Select a field to search 2. Select how to search the field 3. Enter the item to search for											
		•	·			Add Criteria						
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Inclu	de Disabled Records	Group Category System Group	*			Save 🔀 Close						

6 – Add the following fields to the 'Fields Displayed in Order'. The fields MUST appear in the following order. Note whether the field is an Individual field or a Family field.

Last Name (Individual) First Name (Individual) Mailing Name (Family) Salutation (Family) Address (Family) City (Family) State (Family) Zip (Family) Home Phone (Individual) E-mail (Individual) Age (Individual) Marital Status (Individual) Children (Family)

Select Fields to Display All Fields Available Fields Activities Address Address Address Unlisted Address Unlisted Allergies 	 Add Fields Displayed ir Last Name First Name Mailing Name Salutation Address City 	der
Alt Address Alt Address Unlisted Alt Address Unlisted Alt Carrier Sort	Home Phone E-Mail Age Marital Status	Down Down Save Cancel

SEE ADDITIONAL EXAMPLE BELOW. USE SCROLL BAR TO SEE ALL SELECTED FIELDS.

7 – Click 'Save'.



8 – Click 'Save As' after the group detail appears.

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V	Arnold	John	Mr. & Mrs. J	Jim Arnold		Jim		300	Front Street,	Apt 1	Lock	Haven	PA	17745	(717) 555-1234	Jim@mail.com		
\mathbf{V}	Bitner	Jim	Mr. & Mrs. J	Jim Bitner		Jim & Tan	nmy	202	Hogan Blvd /	APT1	Mill H	Hall	PA	17751	Unlisted	john@supercomputergee	ek.com	
V	Bitner	Jack	Mr. & Mrs. J	Jack Bitner		Jack & Jan	e	481	2 Hogan Blvd	l i	Lock	Haven	PA	17745	(402) 555-5234	Jack@work.com		
\mathbf{V}	Blackstone	Patty	Mr. Nick Bla	ackstone		Nick		755	Maple Ave		Jersey	/ Shore	PA	17740-1455	(717) 555-1322	PB_J@mail.com		
V	Boatman	Lee	Leeland and	l Tammarah B	Boatman	Leeland ar	id Tammar	ah 44 F	Reed St		Avis		NC	05555-3445	(215) 555-4234	Mail@mail.com		
\mathbf{V}	Bolton	Michael	Mr. & Mrs.	Michael Bolto	n	Michael &	Barbie	123	4 South St		Nash	ville	TN	37202-1523	(324) 555-5345	Mail@mail.com		
V	Borge	Victor	Mr. Victor B	orge		Victor		147	147 Main		Lock	Haven	PA	17745	(555) 321-4567	email@email.com		1
\mathbf{V}	Bovine	Bob	Bob & Elsie	Bovine		Bob & Elsie		100	100 Cowpath Rd		Greer	n Acres	PA	18006	(407) 555-1234	Bobb@CowPie.com		
V	Brady	Karl	Mrs. & Mrs.	Karl Brady		Karl & Cayte		231	2314 Coyote Ave.		Avis		PA	17022-1442	(570) 123-4123	Kraig@artist.com		
\mathbf{V}	Breadstein	Sally	Ms. Sally Br	eadstein		Sally		154	4 North 1st St	reet	Linde	n	PA	17702	(408) 221-4234	Mail@mail.com		
V	Brunoli	Scott	Mr. Scott Br	unoli		Scott		85 (Chump Rd		Avis		PA	17721-1722	(717) 555-4884	Mail@mail.com		
\mathbf{V}	Cheney	Daniel	Mr. & Mrs.	Dave Cheney		Dave & OI	ga	346	Front Street		Jersey	/ Shore	PA	17740-1766	(717) 555-9874	Mail@mail.com		
V	Chipmunk	Alvin	Mr. Alvin Cl	hipmunk		Alvin		989	South St		St. Lo	uis	MO	63123				
\mathbf{V}	Church	First Baptist	Mr. First Bap	ptist Church		First Baptis	at	570	Jacksonville	Rd	Bellef	onte	PA	16823	(814) 555-2369	email@email.com		
V	Clean	Franklin	The Clean F	amily		Franklin &	Betty	123	Cactus Rd		Jersey	/ Shore	PA	17740-1277	(602) 555-1286	fclean@ffr.com		
\mathbf{V}	Cosmo	Vincent	Vincent Cos	imo		Vincent		515	1 W 21 St		Colur	mbus	он	17787	(555) 717-4567	email@email.com		
V	Cruise	Tom	Mr. & Mrs.	Tom Cruise		Tom & Mi	chelle	155	Woods Rd		Avis		PA	17721	(901) 555-8905	tomc@techie.net		
V	Fernstein	Scott	Mr. & Mrs. 3	Scott Fernsteir	n	Scott & Di	anne	133	44 Flower Blv	d	Lock	Haven	PA	17745	(408) 555-3242	Mail@mail.com		
V	Fletcher	Robert	Mr. & Mrs.	Robert Fletche	er	Bob & Ma	ry	123	4 Orange Ave	:	Phoe	nix	PA	85051-1234	(601) 555-3456	rflethcer@tuba.net		
V	Freddderick	Manny	Manny Fred	ldderick		Manny		34 F	ifth St		Naze	reth	PA	17569	(555) 645-9876	email@email.com		
V	Frompus	Royal	Royal & Ma	ry Frompus		Rollie & M	lary	123	Main St		Lock	Haven	PA	17745	(602) 555-5423	Mail@mail.com		
\mathbf{V}	Gestapo	Andrew	Mr. & Mrs.	Andrew Gesta	ро	Andrew &	Laura	234	Pearl Street		Avis		PA	17725-1255	(313) 555-5234	andrew@servantpc.com		
V	Guftesnhauser	Dwight	Dr. Dwight (Guftesnhause	r	Dwight		123	Main		Sunn	ydale	PA	12345	(556) 547-8946	email@email.com		
V	Hanson	Matt	Mr. & Mrs.	Matt Hanson		Matt & Co	nnie	123	4 Fort Rd		Wate	rville	PA	17742	(555) 784-6548	Mail@mail.com		-
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9 – Enter 'Donor List' as the file name and save in the preferred folder. Click 'Save'.

This completes pulling the data from the Membership module.

Creating the Donor History in Servant Keeper:

1. In the Servant Keeper Contribution module, click on 'Listings' then 'List Individual's Contributions'.

SK Contribu	tion Manager 7						-			-	
File Contr	ibution Account	s Pledges	Payments Re	oorts Tools	Go To Help						
ی Entry	Batches	Edit Batch	Post Batch	Verify Batch	Cash Calculator	ي Import	Edit Posted	Pledges	Payments	Accounts	Listings Help
											List Individuals' Contributions List Individuals' Contribution Totals List Families' Contribution Totals List Individuals' Pledges List Eamilies' Pledge Totals List Edividuals' Payments List Eamilies' Payment Totals

2 – Change the 'Date Range' to include the last 10 full calendar years, ex. 01/01/2006 – 12/31/2016.

3 - Untag all accounts and select 'General Fund' (or the accounts used to track offertory gifts).

4 – Click on 'Select Fields'.

Search Options				
Date Range To Date Range From: 1/ 1/2006 To: 12/31/2016	Accounts Accounts Accounts Comparison of the second Accounts	Untag All Tag All	th for Individuals 👻	C End
Close Select Fields verse Tag	Save As Email List	Print List Merge List		Total Tagged Amount: \$0.00
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5 – Add or remove fields as needed so that only the Last Name, First Name and Batch Date are included in the 'Fields Displayed in Order' box. The fields MUST appear in the given order. Click 'Save'.

Select Fields to Display			23
Available Fields Checkbox 3 Checkbox 4 Checkbox 5 Checkbox 6 Church Background City College Confirmed Date Control Cont	Add Remove	Fields Displayed in Order	Up Up Down
		Save	Cancel

6 – Click 'Find' to complete the report. (This may take quite a few minutes depending on the file size.)

List Individuals' Contributions	A										
Search Options											
Date Range Image From: 1/1/2006 Image To: 1/2/31/2016 Image	Accounts Search for Individuals General Fund Gym Fund Faith Promise 2013 Tag All Show Split Transaction Detail Include Deleted Individuals Include Inactive Accounts	Eind									
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+ 1	Ar	rnold	John	2/4/2007	7					
+ 1	Ar	rnold	John	3/4/2007	7					
+	Ar	rnold	John	4/15/200)7					
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7 – Once the report populates, Click 'Save As'.

8 – Select 'Save as Microsoft Excel File (.xls)'.

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QBArchive (\\Archive\afoarchive) (X:)		
▷ 🗣 Network	E	
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File name: Donor History		•
Hide Folders	Save	Cancel

9 - Enter 'Donor History' as the file name and save in the preferred folder. Click 'Save'.

This completes pulling the data from the Contribution module.

Instructions for using the Calculate Potential Donor Scores Excel Workbook:

1. Import Parishioner Data

- a. Open your respective 'Donor List' sheet that was exported from Servant Keeper
- b. Select cell "A1" (See Figure 1.)



Figure 1 Donor List Imported from Servant Keeper

- c. Press "Ctrl + A" to select the used range of this worksheet
- d. Press "Ctrl + C" to copy the selected data range
- e. Open the 'Calculate Potential Donor Score' Excel Workbook and select the 'Donor List' tab located at the bottom of your screen (See Figure 2.)

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22							
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27							
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Figure 2 'Donor List' tab located on the 'Calculate Potential Donor Scores' Workbook

f. Select cell "A1" and press "Ctrl + V" to paste the copied data: (See Figure 3.)

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Figure 3 Cell "A1" located on the Donor List tab in the 'Calculate Potential Donor Scores' Workbook

- g. Minimize the 'Calculate Potential Donor Scores' Workbook
- h. Open the 'Donor History' Workbook that was exported from Servant Keeper

i. Select cell "A1" and Press "Ctrl + A" to select the used range of this worksheet (See Figure 4.)

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	3	Arnold	John	1/14/2007							
	4	Arnold	John	1/14/2007							
	5	Arnold	John	1/14/2007							
	6	Arnold	John	1/21/2007							
	7	Arnold	John	1/21/2007							
	8	Arnold	John	2/4/2007							
	9	Arnold	John	3/4/2007							
	10	Arnold	John	4/15/2007							
	11	Arnold	John	4/15/2007							
-	12	Arnold	John	4/15/2007							
	12	Arnold	John	11/11/2007							

Figure 4 Selected Used Range from the Donor History exported from Servant Keeper

- j. Press "Ctrl + C" to copy the selected data range
- k. Open the 'Calculate Potential Donor Score' Workbook and select the 'Donor History' tab located at the bottom of your screen (See Figure 5.)



Figure 5 'Donor History' tab located in the 'Calculate Potential Donor Scores' Workbook



I. Select cell "A1" and press "Ctrl + V" to paste the copied data (See Figure 6.)

Figure 6 Cell "A1" located in the 'Donor History' tab in the 'Calculate Potential Donor Scores' Workbook

m. Ensure that the 'Calculate Potential Donor Scores' workbook has both the 'Donor List' and 'Donor History' data that was exported from Servant Keeper (See Figures 7 & 8)

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Arnold	John	Mr. & Mrs. Jim Arnold	Jim	300 Front Street,	Apt 1	Lock Have	en .	PA	17745	(717) 555-1234		Jim@mail.com
Bitner	Jim	Mr. & Mrs. Jim Bitner	Jim & Tammy	202 Hogan Blvd A	PT1	Mill Hall		PA	17751	Unlisted		john@supercomp
Bitner	Jack	Mr. & Mrs. Jack Bitner	Jack & Jane	4812 Hogan Blvd		Lock Have	m	PA	17745	(402) 555-5234		Jack@work.com
Blackstone	Patty	Mr. Nick Blackstone	Nick	755 Maple Ave		Jersey Shi	ore	PA	17740-1455	(717) 555-1322		PB_J@mail.com
Boatman	Lee	Leeland and Tammarah	Leeland and	44 Reed St		Avis		NC	05555-3445	(215) 555-4234		Mail@mail.com
Bolton	Michael	Mr. & Mrs. Michael Bolton	Michael & Barbie	1234 South St		Nashville	6	TN	37202-1523	(324) 555-5345		Mail@mail.com
Borge	Victor	Mr. Victor Borge	Victor	147 Main		Lock Have	in .	PA	17745	(555) 321-4567		email@email.com
Bovine	Bob	Bob & Elsie Bovine	Bob & Elsie	100 Cowpath Rd		Green Acr	es	PA	18006	(407) 555-1234		Bobb@CowPie.com
Brady	Karl	Mrs. & Mrs. Karl Brady	Kari & Cayte	2314 Coyote Ave.		Avis		PA	17022-1442	(570) 123-4123		Kraig@artist.com
Breadstein	Sally	Ms. Sally Breadstein	Sally	1544 North 1st Str	reet	Linden		PA	17702	(408) 221-4234		Mail@mail.com
Brunoli	Scott	Mr. Scott Brunoli	Scott	85 Chump Rd		Avis		PA	17721-1722	(717) 555-4884		Mail@mail.com
Cheney	Daniel	Mr. & Mrs. Dave Cheney	Dave & Olga	346 Front Street		Jersey She	ore	PA	17740-1766	(717) 555-9874		Mail@mail.com
Chipmunk	Alvin	Mr. Alvin Chipmunk	Alvin	989 South St		St. Louis		MO	63123			
Church	First Baptist	Mr. First Baptist Church	First Baptist	570 Jacksonville	Rd	Bellefont	e	PA	16823	(814) 555-2369		email@email.com
Clean	Franklin	The Clean Family	Franklin & Betty	123 Cactus Rd		Jersey Shi	ore	PA	17740-1277	(602) 555-1286		fclean@ffr.com
Cosmo	Vincent	Vincent Cosmo	Viocent	\$151 W 21 St		Columbus		OH	17787	(555) 717-4567		email@email.com
Couise	Tom	Mr. & Mrs. Tom Cruise	Tom & Michelle	155 Woods Rd		Avis	• ^	PA	17721	(901) 555-8905		tomc@techie net
Fernstein	tt	Mr. & Mrs. Scott Fernstein	Scott & Dianne	13344 Flower Blv	d	Lock Have	-	PA	17745	(408) 555-3242		Mail@mail.com
Fletcher	pert	Mr. & Mrs. Robert Fletcher	Bob & Mary	1234 Orange Ave		Phoenix		PA	85051-1234	(601) 555-3456		rflethcer@tuba.ne
Freddderick	DOX	Manny Freddderick	Manny	34 Fifth St		Nazereth		PA	17569	(555) 645-9876		email@email.com
Fromous	1	Royal & Mary Fromous	Rollie & Mary	123 Main St		Lock Have	10	PA	17745	16021 555-5423		Mail@mail.com
1. Carrier and		the fact of the state of the state of the	the second secon	and the fit of						(in a start of the start of the

Figure 7 Copied Donor List in 'Calculate Potential Donor Scores' Workbook



Figure 8 Copied 'Donor History' in the 'Calculate Potential Donor Scores' Workbook

2. Add 'Developer' Tab a. In the 'Calcul Figures 9 & 1	to Microsoft Excel late Potential Donor Scores' Wor 10)	·kbook, click 'File' then 'Opt	ions' (See
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A1 • : X •	Jx Last Name		

Figure 9 File tab located in the 'Calculate Potential Donor Scores' Workbook



Figure 10 Options located in the 'Calculate Potential Donor Scores' Workbook

 Select 'Customize Ribbon' and ensure that 'Developer' on the right hand table is checked, if not then click the check box to ensure that 'Developer' is selected. Click 'OK' (See Figure 11)



Figure 11 Developer option located in the 'Calculate Potential Donor Scores' Workbook

c. Note that 'Developer' is now a tab on the Excel Ribbon located at the top of your screen (See Figure 12)

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	Clipboard	Gi i	Font	Fa		Alignmen	t	Ei.	Number	- Fa	Styl
A1	- :	\times	f_x Las	t Name							

Figure 12 Developer tab located in the 'Calculate Potential Donor Scores' Workbook

3. Calculate the Scores

- a. Close all other programs except for this Excel Workbook (Calculate Potential Donor Score)
- b. Click on the 'Developer' tab located on the top of your screen and then 'Macros' (See Figure 13.)

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Code	Add-Ins	c	ontrols		XML		Modify
A1 \checkmark : $\times \checkmark f_x$	Last Name						

Figure 13 Developer > Macro button located in the 'Calculate Potential Donor Scores' Workbook

c. Ensure that 'CalculateScores' is highlighted in the Macro Window. Click 'Run' (See Figure 14.)

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M <u>a</u> cros in: All Open Workbooks	
Description	
	Cancel

Figure 14 Macro table

d. *****WARNING*****

- i. This may take a LONG time and Excel may become 'Non Responsive'
- This is OK, Excel is now automatically computing the Scores and the scores will post in the 'Summary' tab located at the bottom of the screen. (See Figure 15.)

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	A	в	c	D	E	F	G	н	1	L L	к	L L	M	N	0	P	a	
	LastName	First Name	Mailing Name	Salutation	Address	City	State	Zip Code	Home Phone	E-Mail	Age Score	Family Status Score	Marital Status Score	Giving History Score	Engage ment v/ Organiz ation	Total Score		Ê
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	Saltman	Harold	Mr & Mrc Harry Saltman	Home & Monu	1/33 Dodgo Aug	Williammont	PA DA	17701-1276	(717) 555-4545	Mail@mail.com		2 3	1	1		7		-
	Balton	Miebael	Mr. 8 Mrs. Michael Belton	Michael & Barbie	1234 South St	Nachuilla	TN	37202-1523	(324)555-5345	Mali@mail.com		1 3	1			6		-
0	Borgo	Vistor	Mr. Weter Berne	Weter	1/7 Male	Look Haven	DA.	17745	(555) 321-4567	email@email.com		1 2				6		-
7	Breadstein	Sallo	Mr. Sallu Breadstein	Sallo	1544 North 1st Street	Linden	PA	17702	(408) 221-4234	Mail@mail.com		, 2		0		6		-
	Mitchell	Mark	Mr. 8 Mrs. Mike Mitchell	Mike & Kellu	5 Gards Rd	Arie	PA	17721-1987	(717) 555=1983	Mail@mail.com	-	1 2	1	2		6		-
- 9	Terk	Kenneth	Mr & Mrs Ken Terk	Kep & Margeep	7 Otobard Hill Bd	Jersey Shore	PA	17740-1772	(717) 555-1299	Mail@mail.com	2	2	1	1		6		-
10	Bitner	Jim	Mr. & Mrs. Jim Bitner	Jim & Tammu	202 Hogan Blvd APT1	Mil Hall	PA	17751	Unlisted	john@supercomputergeek.com		1 3	1	1		5		-
11	Bradu	Karl	Mrs. & Mrs. Karl Bradu	Karl & Caute	2314 Counte Ave	Auto	PA	17022-1442	(570) 123-4123	Kraid@artist.com		1 3	1	0		5		-
12	Cheney	Daniel	Mr. & Mrs. Bave Cheney	Dave & Olga	346 Front Street	Jersey Shore	PA	17740-1766	(717) 555-9874	Mail@mail.com	0	1 3	1	1		5		-
13	Clean	Franklin	The Clean Family	Franklin & Betty	123 Cactus Bd	Jersey Shore	PA	17740-1277	(602)555-1286	fclean@ffr.com		1 3	1	0		5		-
14	Fletcher	Robert	Mr. & Mrs. Robert Fletcher	Bob & Mary	1234 Orange Ave	Phoenix	PA	85051-1234	(601) 555-3456	rflethcer@tuba.net		1 3	1	Q		5		-
15	Gestapo	Andrew	Mr. & Mrs. Andrew Gestapo	Andrew & Laura	234 Pearl Street	Avis	PA	17725-1255	(313) 555-5234	andrev@servantpc.com	0) 3	1	1		5		1
16	Muthler	Damion	Mr. & Mrs. Damion Muthler	Damion & Lisa	855 Fourth Street	Avis	PA	17721-1245	(717) 555-9978	Mail@mail.com	-	1 3	1	0		5		1
17	Newman	Ed	Ed & Janet Newman	Ed & Janet	300 Front St	Jersey Shore	PA	17745-1243	(717) 555-4934	en@servantpc.com		1 2	: 1	1		5		1
18	Notenough	Orville	Orville & Stephanie Notenough	Orville & Stephanie	44 Oldtimers Way	Newark	NJ	05555-0142	(215) 555-1232	onot@tutu.net	3	3 1	1 1	0		5		
19	Oswald	Mike	Mr. & Mrs. Mike Oswald	Mike & Sarah	200 Computer Lane	State College	PA	18777	(314) 555-3948	mjosbo@yahoo.com	0) 3	1	1		5		1
20	Smith	Jonathan	Jonathan & Maryanne Smith	Jon & Maryanne	315 S. Main Street	Jersey Shore	PA	17740-1723	(555) 398-1334	LovinServantKpr@aol.com		1 3	1	0		5		1
21	Arnold	John	Mr. & Mrs. Jim Arnold	Jim	300 Front Street, Apt 1	Look Haven	PA	17745	(717) 555-1234	Jim@mail.com	0) 1	1 1	2		4		1
22	Boatman	Lee	Leeland and Tammarah Boatman	Leeland and Tammarah	44 Reed St	Avis	NC	05555-3445	(215) 555-4234	Mail@mail.com	0) 3	1	0		4		
23	Chipmunk	Alvin	Mr. Alvin Chipmunk	Alvin	989 South St	St. Louis	MO	63123			0) 3	1	0		4		
24	Church	First Baptist	Mr. First Baptist Church	First Baptist	570 Jacksonville Rd	Bellefonte	PA	16823	(814) 555-2369	email@email.com	0) 3	1	0		4		
25	Cosmo	Vincent	Vincent Cosmo	Vincent	5151 W 21 St	Columbus	OH	17787	(555) 717-4567	email@email.com	0) 3	1	0		4		
26	Cruise	Tom	Mr. & Mrs. Tom Cruise	Tom & Michelle	155 Woods Rd	Avis	PA	17721	(901) 555-8905	tomc@techie.net	0) 3	1	0		4		
27	Guftesnhauser	Dwight	Dr. Dwight Guftesnhauser	Dwight	123 Main	Sunnydale	PA	12345	(556) 547-8946	email@email.com	0) 3	1	0		4		
28	Hanson	Matt	Mr. & Mrs. Matt Hanson	Matt & Connie	1234 Fort Rd	Waterville	PA	17742	(555) 784-6548	Mail@mail.com	0) 3	1	0		4		
29	Jackson	Edward	Ed & Patricia Jackson	Ed & Patricia	1239 Main St	Phoenix	A.	85021-1887	Unlisted	Mai@mail.com	0	1 3	1	0		4		
30	Knight	Plichael	Michael Knight	Michael	80 S Television St	Holly Wood		999999	(666) 555-4567	emai@email.com	0	3		0		4		-
31	Lynn MaeMilee	Tred	ried and Plarsha Lynn	Tred and Marsha	20 douth St	Albany	N	12203	(558) 467-8394	email@email.com		3		0		4		-
- 32	Mac	TUT	Pill or Pils. Tom Placmillen	Tim and Market	Last 3(Dallas	1	0012 00400	(000)040-1004	eman@email.com		, 3		0		4		-
24	Marou	Thomas	Tim and Harman 1an	Tem & Javas	233 Mountain Aus	Lindon		7742-3422	(412) 555-4545	emangeman.com Mal@mail.com		, 3		0		4		-
34	Multier	Anthony	Ontheny Million	for the source	100 Repeals Dr	Cincin atti		1019273922	(+12) 333-4345 (EEE) 64E_1234	many mail.com		, 3		0		4		-
20	Ned	Needlabaad	Mr. Needlahand Ned	Needlahead	8 Down St	Nazarath	PA	17569	(555)645=7894	emai@email.com		1 3		0		4		1
-17	Newberry	Ropald	Bonald & Darlene Newberry	Ronald & Darlene.	1234 Manhattan Ave	St Louis		5-1324	(314) 555-2342	Mail@mail.com		1 3	- 1	0		4		-
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REA	DY 🔠	Donor List	Donor History History	Tear	, wondhiet Di	shor worksheet	Sammar					Ħ	B	m			+ 7) 0%

Figure 15 Completed 'Summary' tab in the 'Calculate Potential Donor Scores' Workbook

e. The only score that Excel cannot compute is the Engagement with your Organization Score which will have to be manually entered according to the Roman Catholic Foundation form titled 'Assessing the Potential for a Planned Giving Donor'.

4. Scoring Metric for the 'Engagement With Your Organization'

a.	Volunteer of Board Member	3 Points
b.	Past Volunteer of Board Member; Still Engaged	2 Points
c.	Past Volunteer or Board Member; no Longer Engaged	1 Point
d.	No History Other than as a Donor	0 Points

5. Total Scoring Metric

- a. 10 15 Points Best Candidates
- b. 8 9 Points Has Potential, but May Need Nurturing
- c. 0 7 Points Continue to Engage, but Least Likely to Consider a Planned Gift