

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.

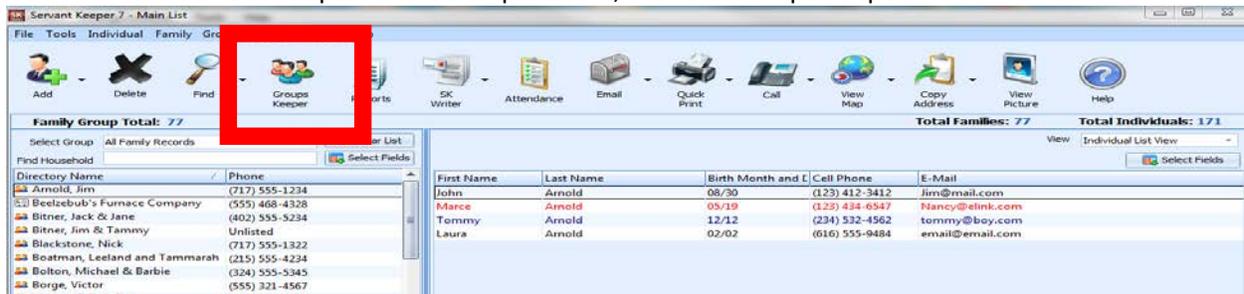
To ensure an accurate assessment of the donors, please review the Servant Keeper file and verify that all fields contain valid data for registered parishioners. Pay particular attention to the Age (which requires a birthdate to be entered) and Marital Status fields.

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

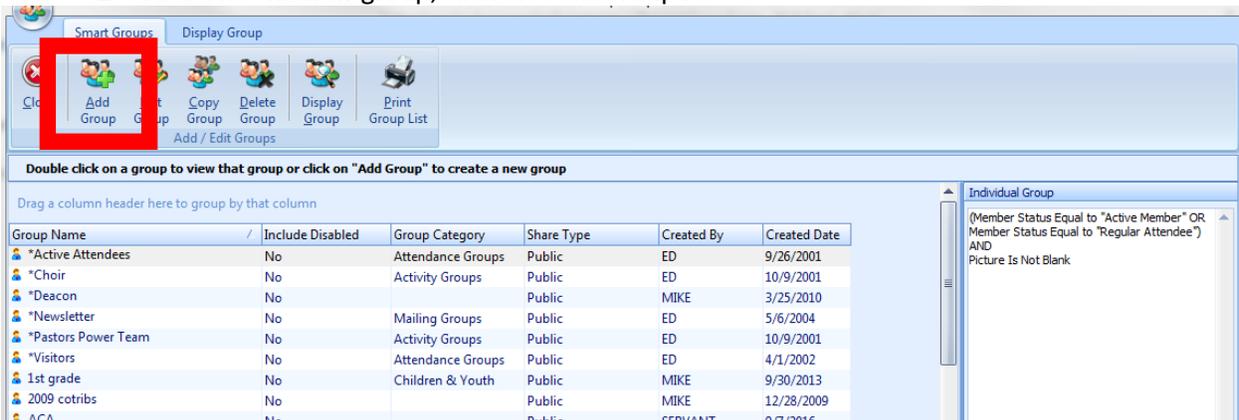
Please direct questions regarding the procedure to Sally Serbus, Parish Support Manager, at 314.792.7716 or sallyserbus@archstl.com.

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'.



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'.

Enter the Group Name
Donor List

Show
 Individuals Families

Show Fields for:
Show Individual Fields

Add Criteria: Repeat steps 1-4 as needed to build the group

1. Select a field to search 2. Select how to search the field 3. Enter the item to search for

(Field	How To Search	Item to Search For)	And/Or
(Member Status	Not Equal to	Deceased		OR
	Member Status	Not Equal to	Moved		OR
	Member Status	Not Equal to	Transferred)	AND
	Relationship	Equal to	Head of Household		

Group Criteria Sharing Description

Copy Line
Delete Line
Delete All
Move Line
Move Line
Select Fields

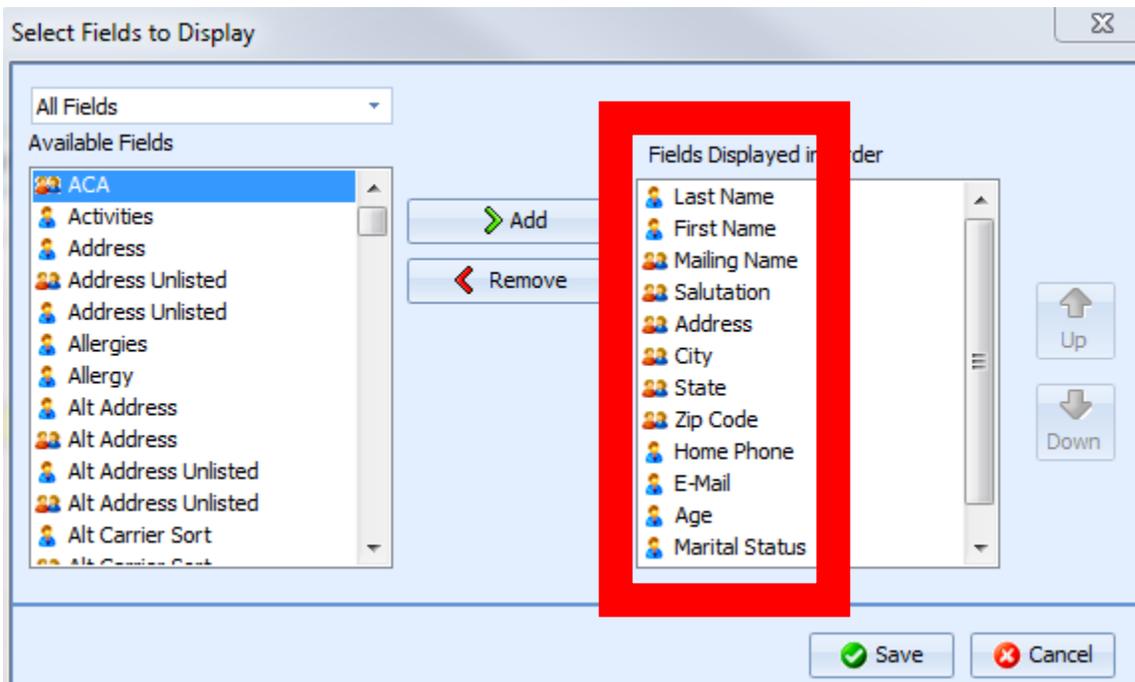
Last Name
First Name
Mailing Name
Salutation
Address
City
State
Zip Code
Home Phone
E-Mail

Include Disabled Records Group Category System Group

Save Close

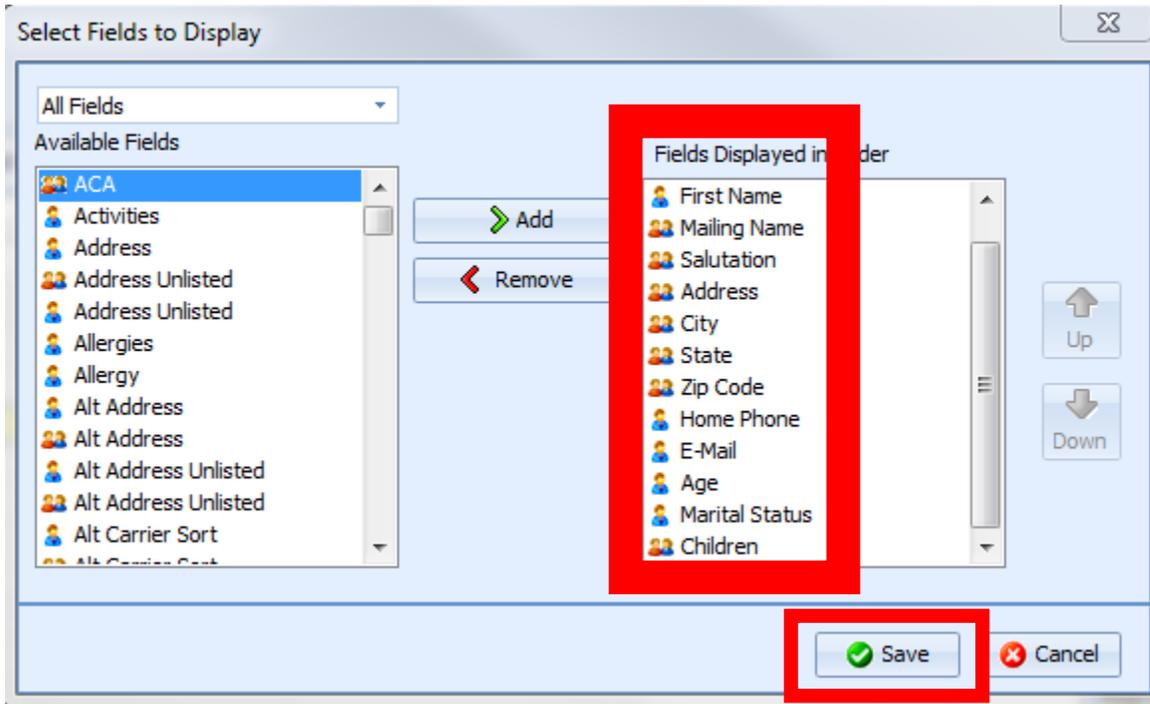
6 – Add the following fields to the 'Fields Displayed in Order'. The fields MUST appear in the following order. Note whether the field is an Individual field or a Family field.

- 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)

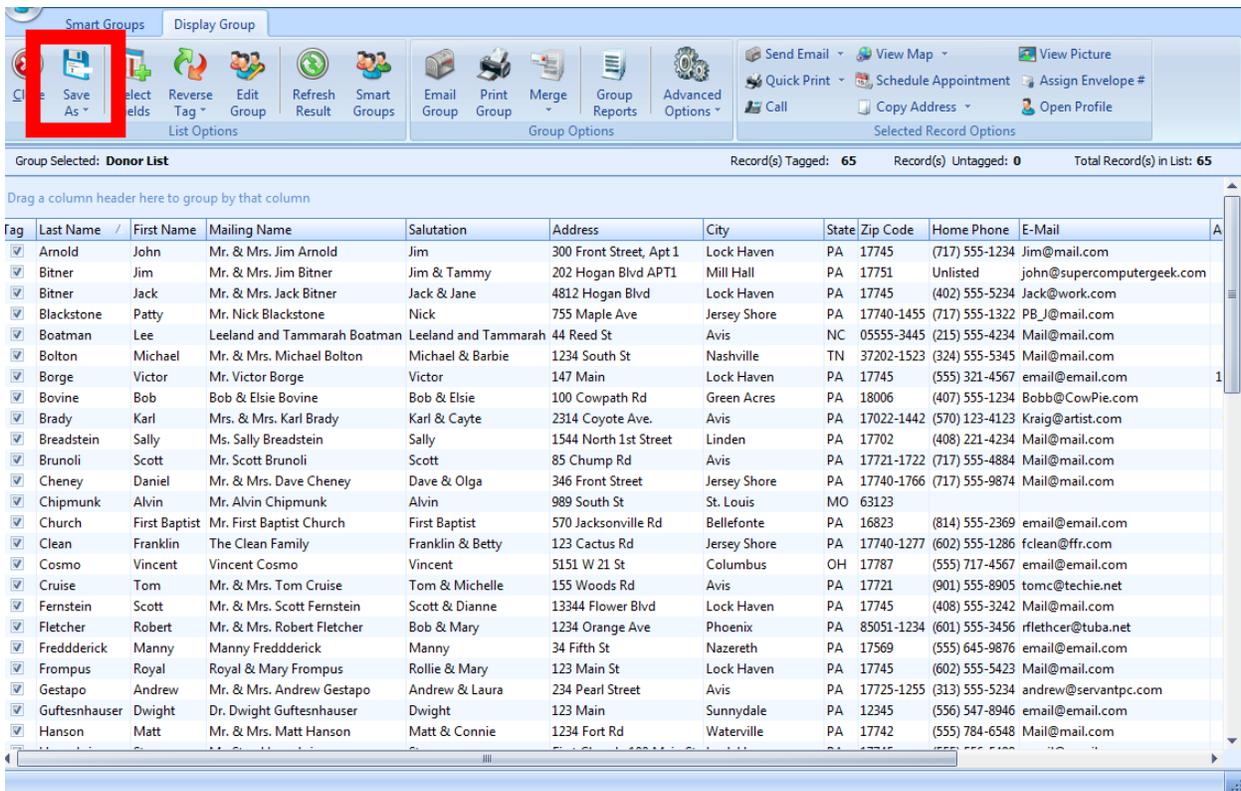


SEE ADDITIONAL EXAMPLE BELOW. USE SCROLL BAR TO SEE ALL SELECTED FIELDS.

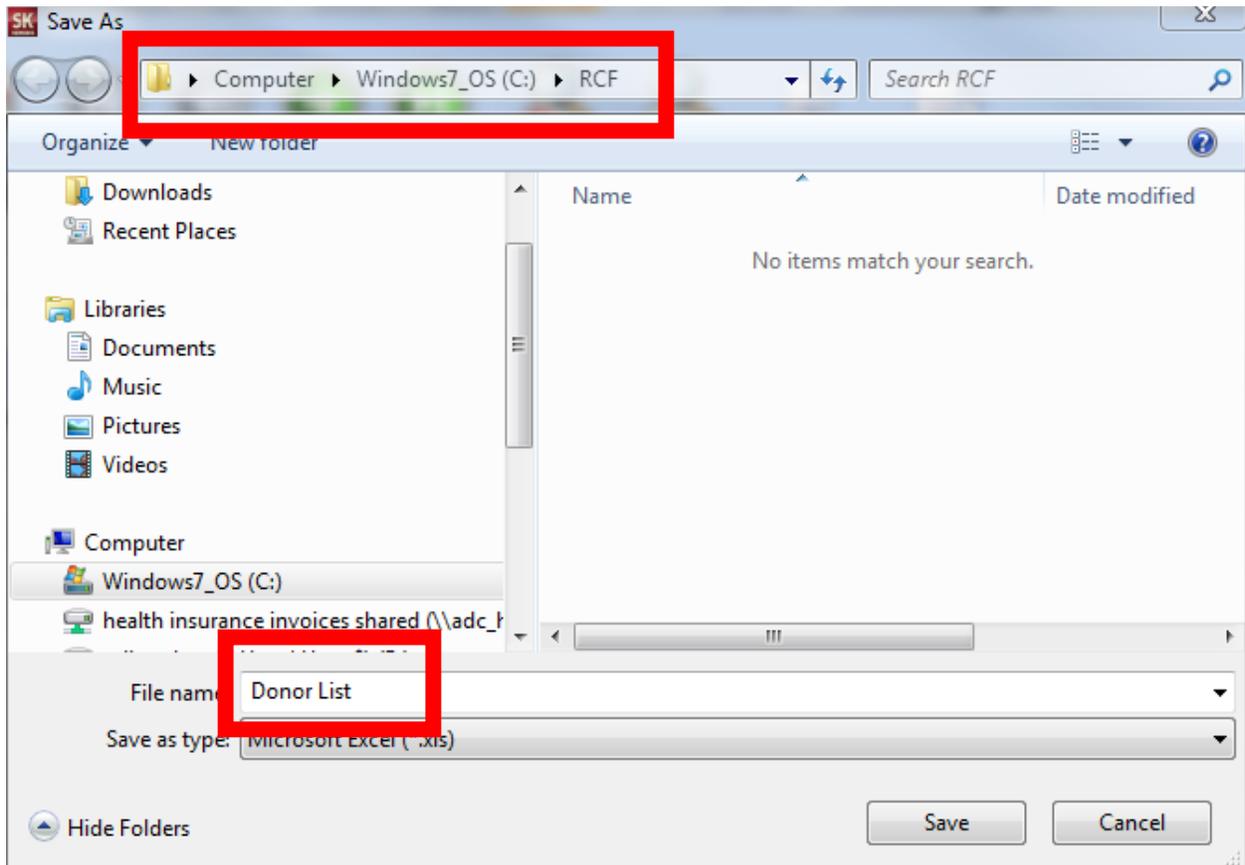
7 – Click ‘Save’.



8 – Click ‘Save As’ after the group detail appears.



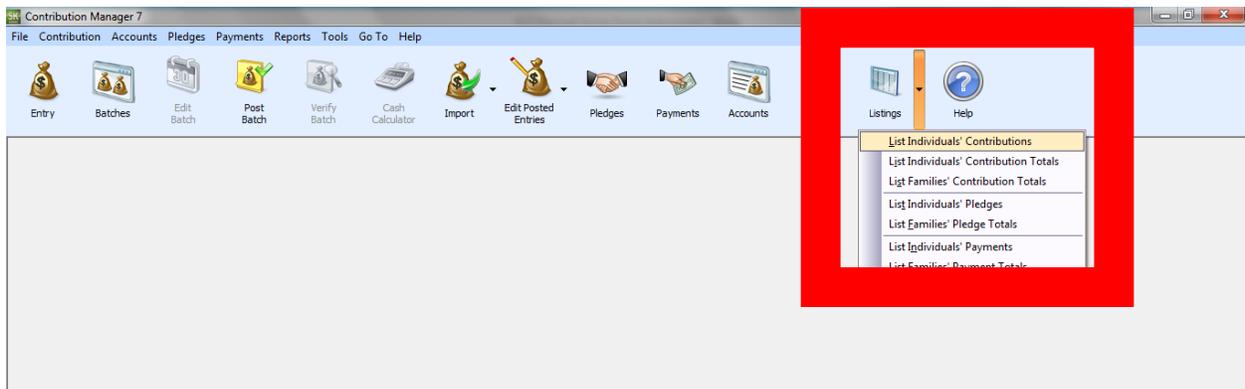
9 – Enter 'Donor List' as the file name and save in the preferred folder. Click 'Save'.



This completes pulling the data from the Membership module.

Creating the Donor History in Servant Keeper:

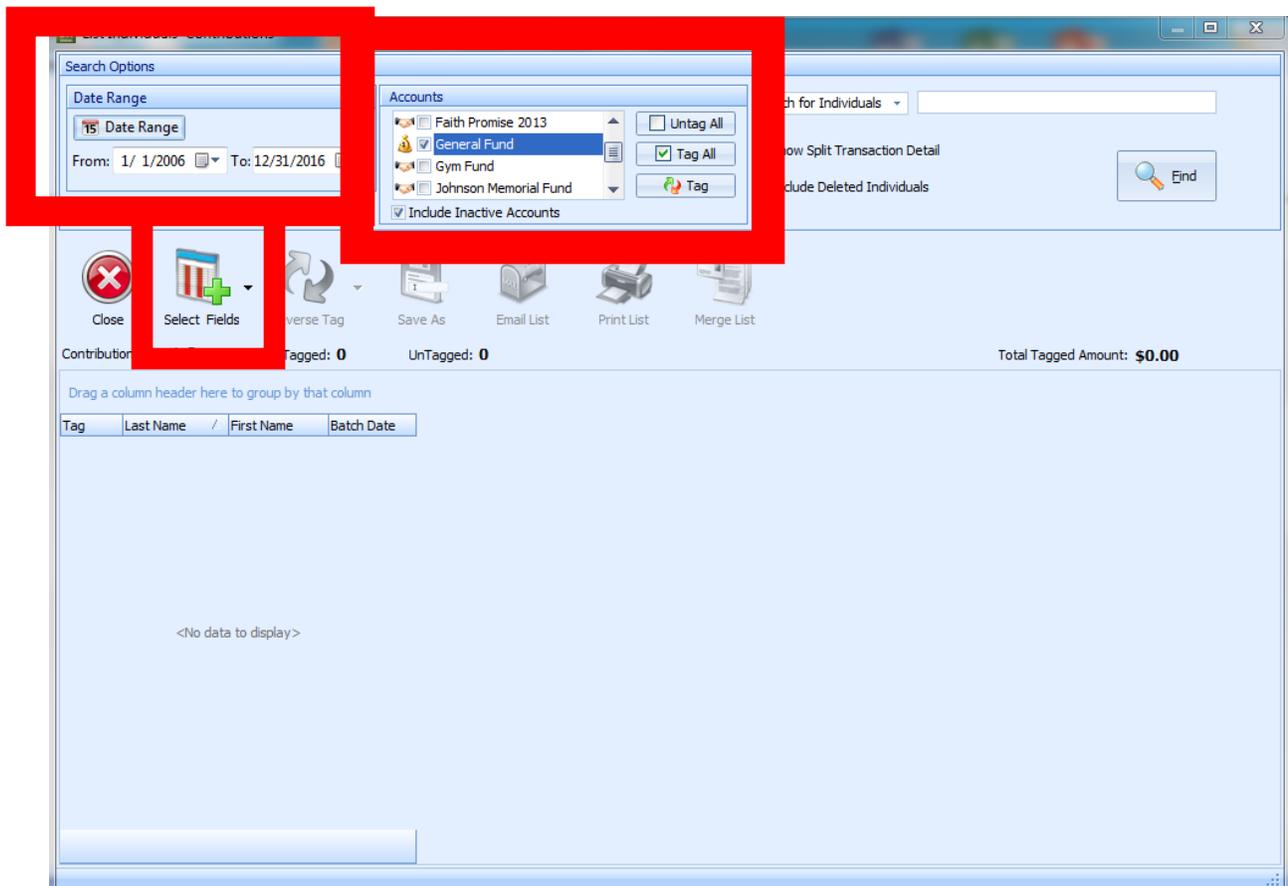
1. In the Servant Keeper Contribution module, click on 'Listings' then 'List Individual's Contributions'.



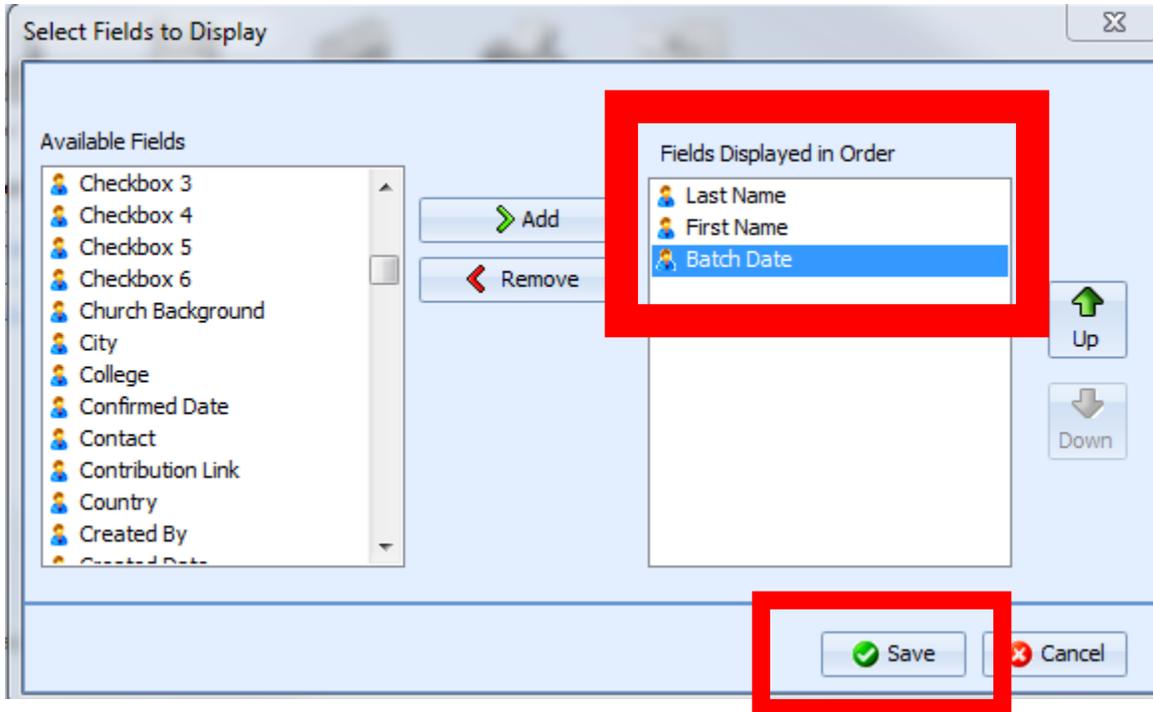
2 – Change the 'Date Range' to include the last 10 full calendar years, ex. 01/01/2006 – 12/31/2016.

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

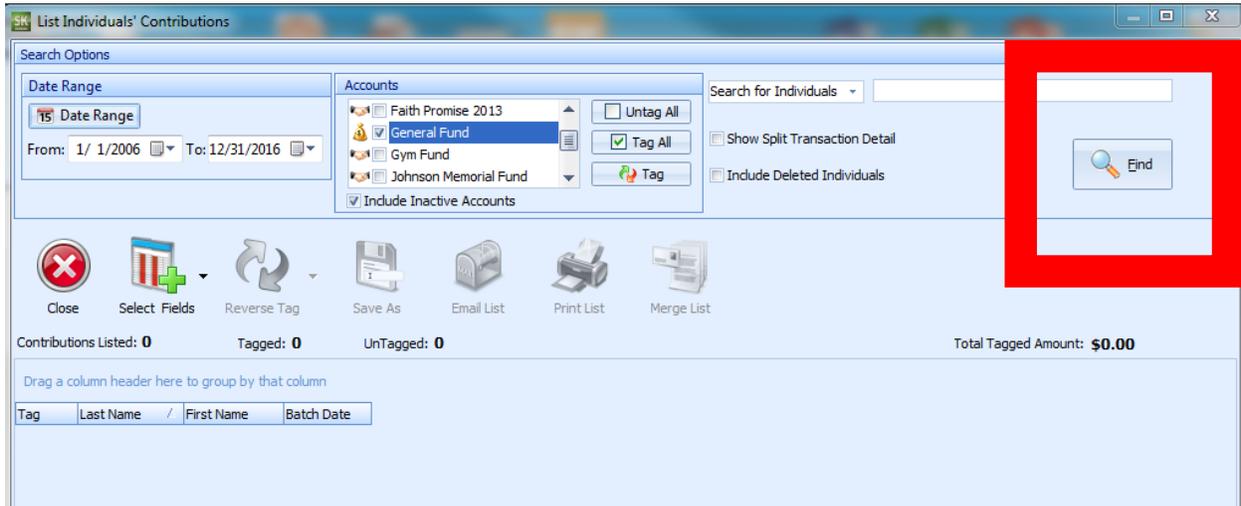
4 – Click on 'Select Fields'.



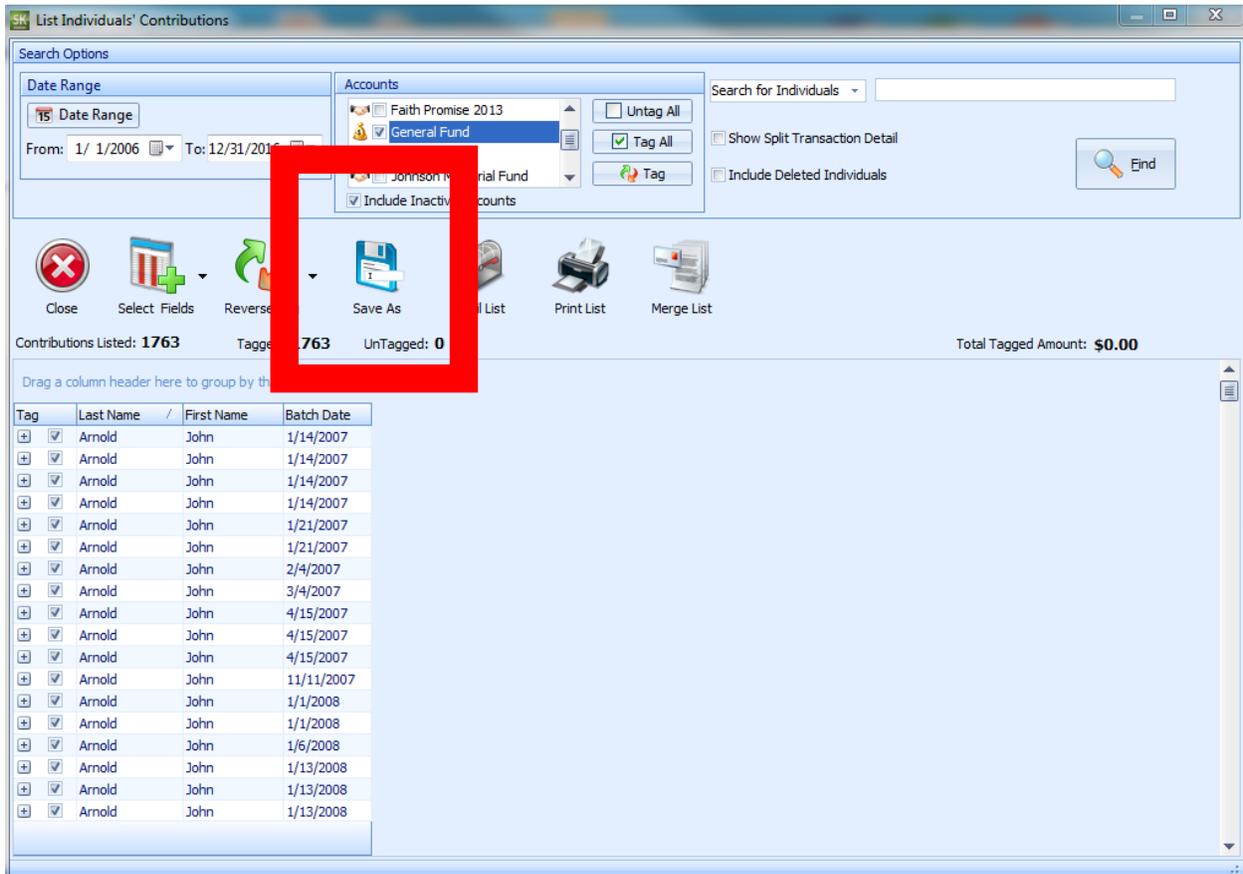
5 – Add or remove fields as needed so that only the Last Name, First Name and Batch Date are included in the 'Fields Displayed in Order' box. The fields MUST appear in the given order. Click 'Save'.



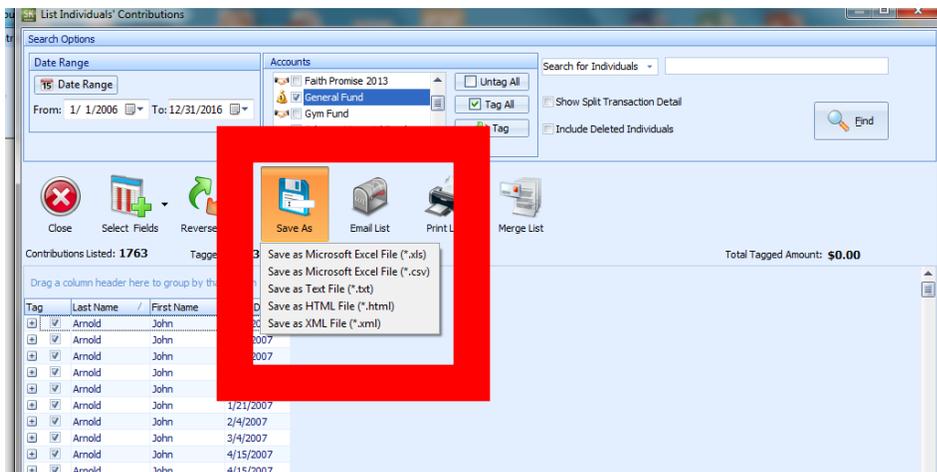
6 – Click 'Find' to complete the report. (This may take quite a few minutes depending on the file size.)



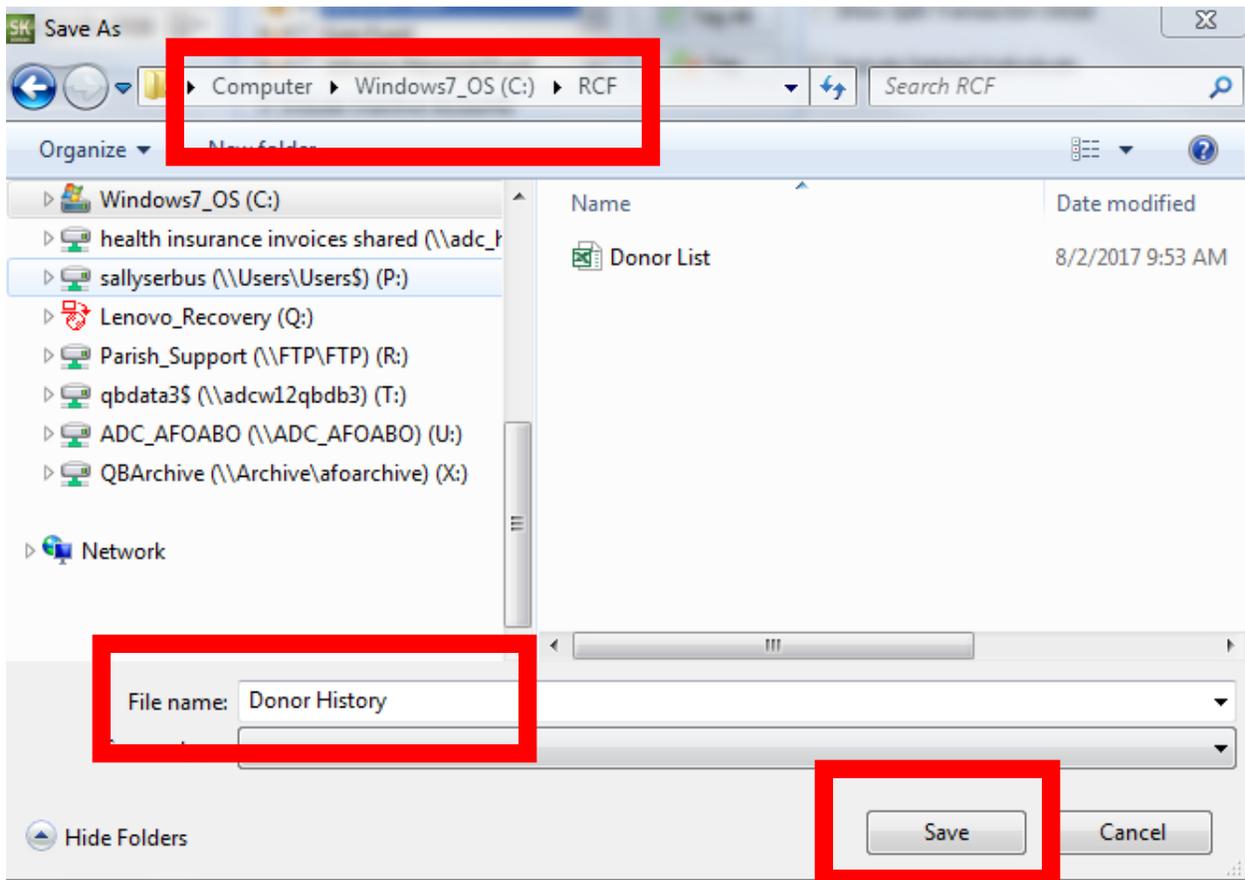
7 – Once the report populates, Click ‘Save As’.



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



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

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

	A	B	C	D	E	F
1	Last Name	First Name	Mailing Name	Salutation	Address	City
2	Arnold	John	Mr. & Mrs. Jim Arnold	Jim	300 Front Street, Apt 1	Lock Haven
3	Bitner	Jim	Mr. & Mrs. Jim Bitner	Jim & Tammy	202 Hogan Blvd APT1	Mill Hall
4	Bitner	Jack	Mr. & Mrs. Jack Bitner	Jack & Jane	4812 Hogan Blvd	Lock Haven
5	Blackstone	Patty	Mr. Nick Blackstone	Nick	755 Maple Ave	Jersey Shore
6	Boatman	Lee	Leeland and Tammarah Boatman	Leeland and Tammarah	44 Reed St	Avis
7	Bolton	Michael	Mr. & Mrs. Michael Bolton	Michael & Barbie	1234 South St	Nashville
8	Borge	Victor	Mr. Victor Borge	Victor	147 Main	Lock Haven
9	Bovine	Bob	Bob & Elsie Bovine	Bob & Elsie	100 Cowpath Rd	Green Acres
10	Brady	Karl	Mrs. & Mrs. Karl Brady	Karl & Cayte	2314 Coyote Ave.	Avis
11	Breadstein	Sally	Ms. Sally Breadstein	Sally	1544 North 1st Street	Linden
12	Brunoli	Scott	Mr. Scott Brunoli	Scott	85 Chump Rd	Avis
13	Cheney	Daniel	Mr. & Mrs. Dave Cheney	Dave & Olga	346 Front Street	Jersey Shore
14	Chipmunk	Alvin	Mr. Alvin Chipmunk	Alvin	989 South St	St. Louis
15	Church	First Baptist	Mr. First Baptist Church	First Baptist	570 Jacksonville Rd	Bellefonte
16	Clean	Franklin	The Clean Family	Franklin & Betty	123 Cactus Rd	Jersey Shore

Figure 1 Donor List Imported from Servant Keeper

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

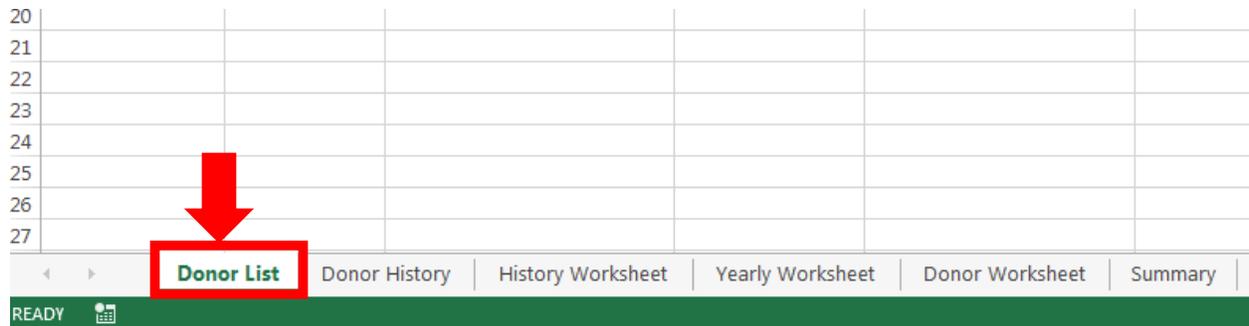


Figure 2 'Donor List' tab located on the 'Calculate Potential Donor Scores' Workbook

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

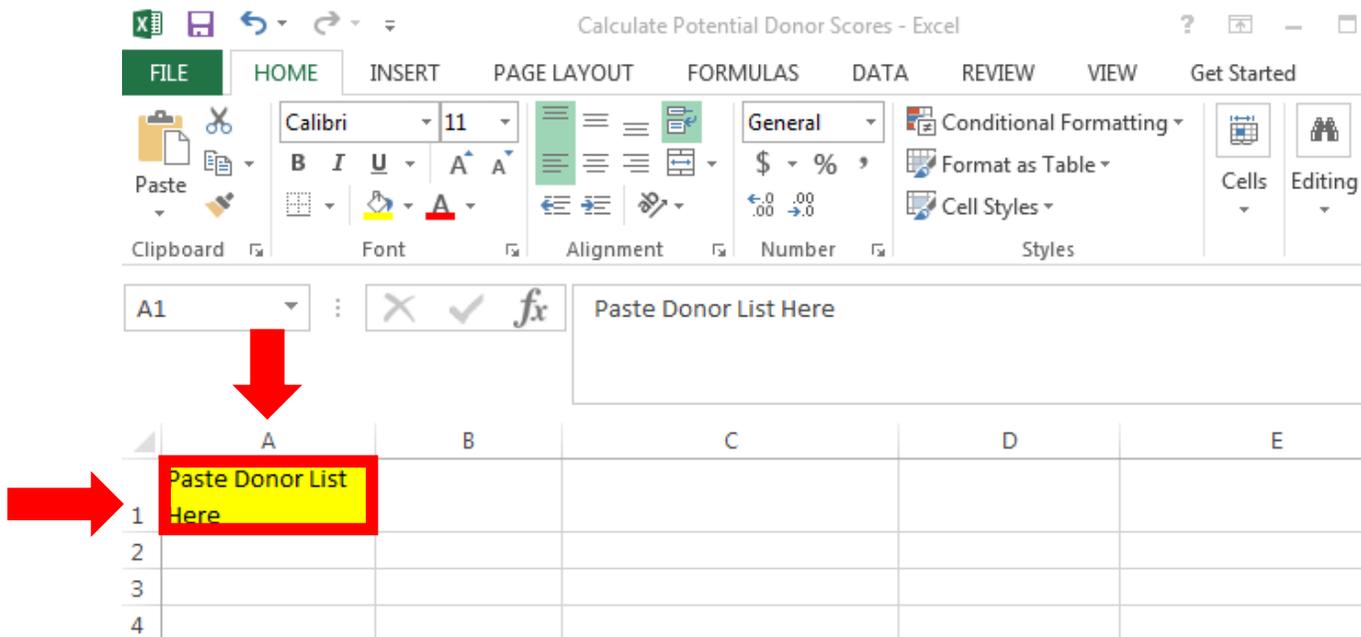


Figure 3 Cell "A1" located on the Donor List tab in the 'Calculate Potential Donor Scores' Workbook

- 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.)

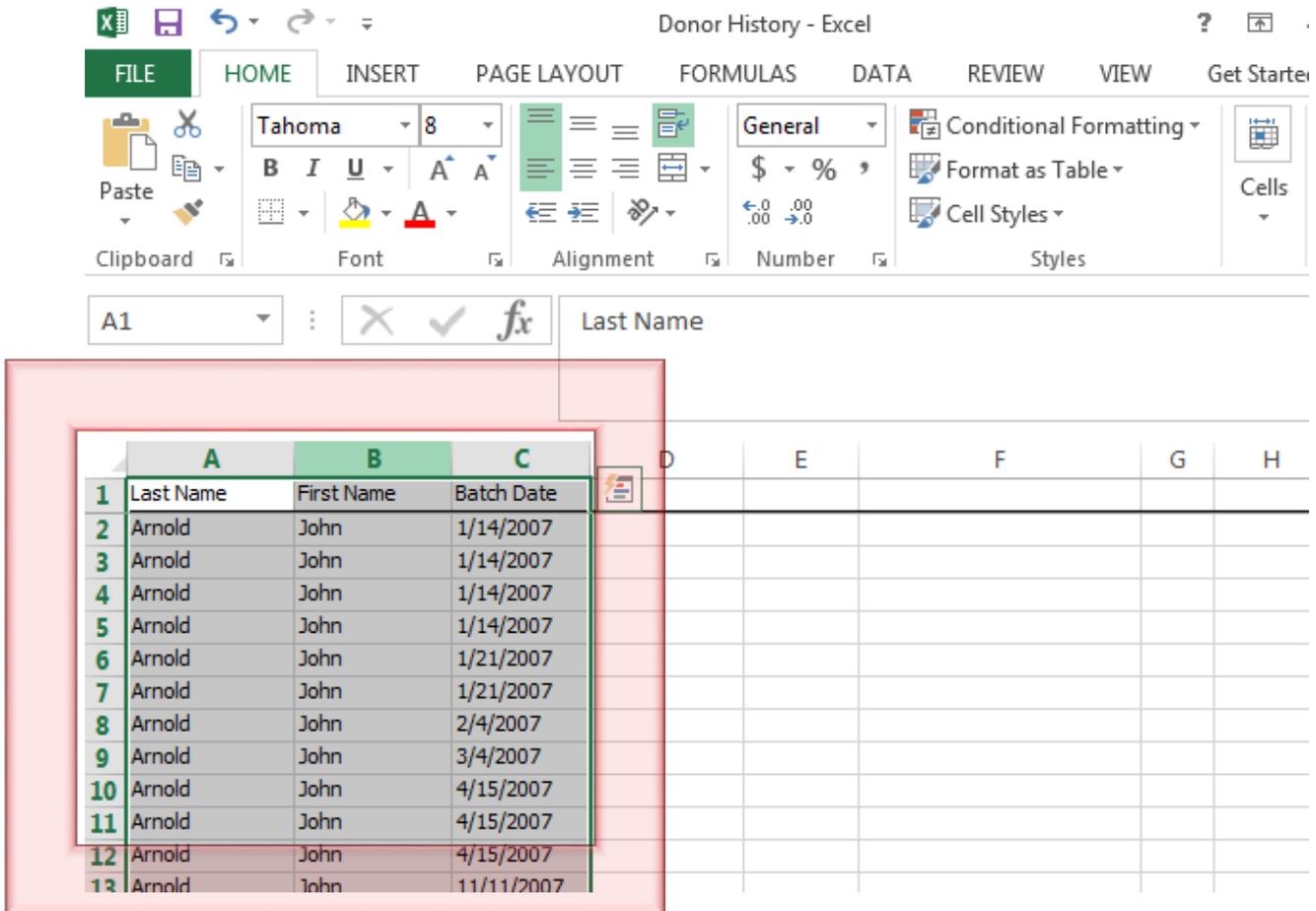


Figure 4 Selected Used Range from the Donor History exported from Servant Keeper

- 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.)

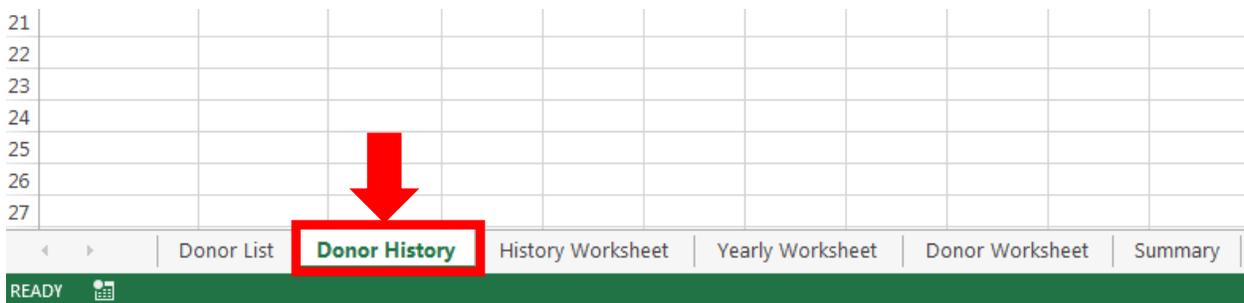


Figure 5 'Donor History' tab located in the 'Calculate Potential Donor Scores' Workbook

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

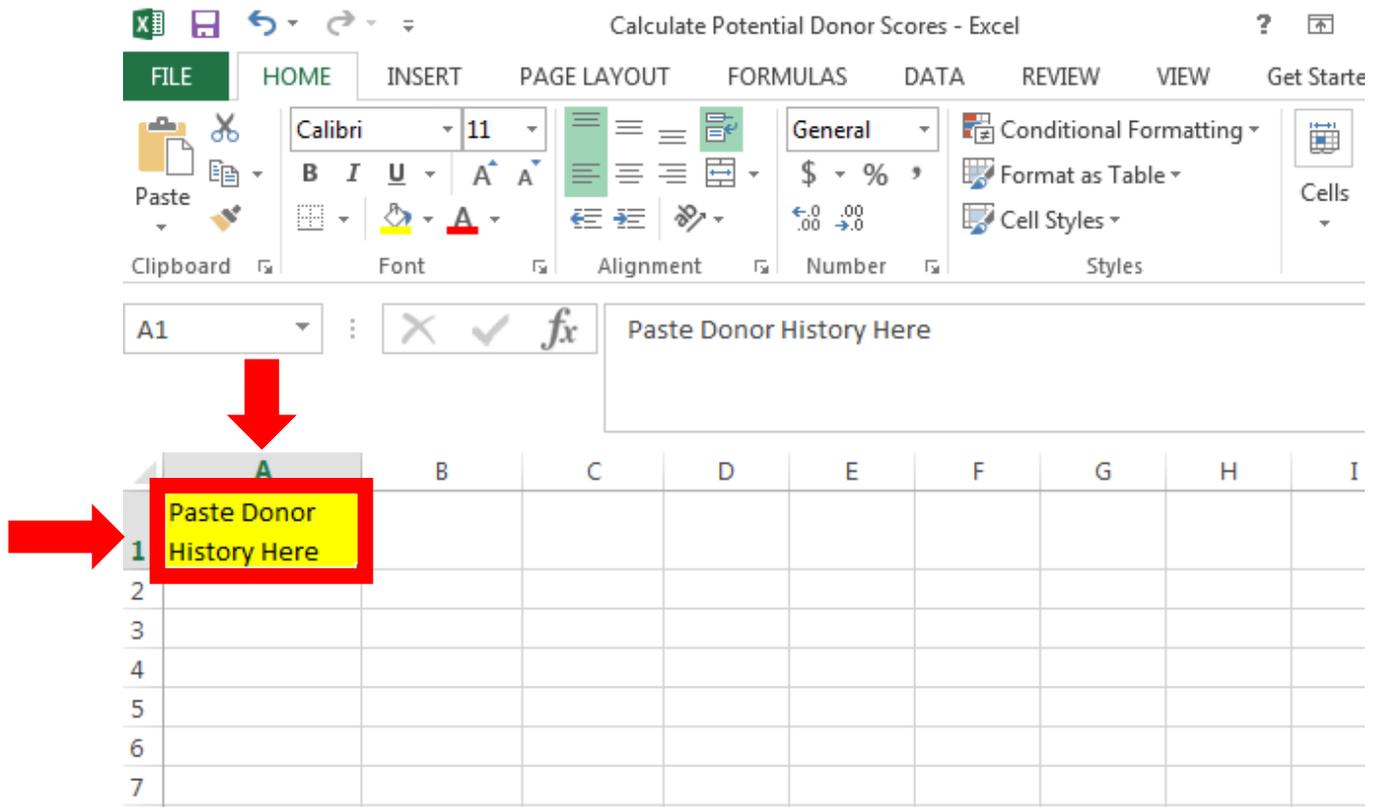


Figure 6 Cell "A1" located in the 'Donor History' tab in the 'Calculate Potential Donor Scores' Workbook

- 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)

A	B	C	D	E	F	G	H	I	J
Last Name	First Name	Mailing Name	Salutation	Address	City	State	Zip Code	Home Phone	
Arnold	John	Mr. & Mrs. Jim Arnold	Jim	300 Front Street, Apt 1	Lock Haven	PA	17745	(717) 555-1234	Jim@mail.com
Bitner	Jim	Mr. & Mrs. Jim Bitner	Jim & Tammy	202 Hogan Blvd APT1	Mill Hill	PA	17751	Unlisted	john@supercompute
Bitner	Jack	Mr. & Mrs. Jack Bitner	Jack & Jane	4812 Hogan Blvd	Lock Haven	PA	17745	(402) 555-5284	Jack@work.com
Blackstone	Patty	Mr. Nick Blackstone	Nick	755 Maple Ave	Jersey Shore	PA	17740-1455	(717) 555-1322	PB_J@mail.com
Boatman	Lee	Leeland and Tammarah Boatman	Leeland and Tammarah	44 Reed St	Avis	NC	05555-9445	(215) 555-4234	Mail@mail.com
Bolton	Michael	Mr. & Mrs. Michael Bolton	Michael & Barbie	1234 South St	Nashville	TN	37202-1523	(324) 555-3445	Mail@mail.com
Borge	Victor	Mr. Victor Borge	Victor	147 Main	Lock Haven	PA	17745	(555) 321-4567	email@email.com
Bovine	Bob	Bob & Elsie Bovine	Bob & Elsie	100 Cowpath Rd	Green Acres	PA	18006	(407) 555-1234	Bob@CowPie.com
Brady	Kari	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 Street	Linden	PA	17702	(408) 221-4234	Mail@mml.com
Brunoli	Scott	Mr. Scott Brunoli	Scott	85 Clump Rd	Avis	PA	17721-1722	(717) 555-4884	Mail@mail.com
Cheney	Daniel	Mr. & Mrs. Dave Cheney	Dave & Olga	348 Front Street	Jersey Shore	PA	17740-1766	(717) 555-9874	Mail@mail.com
Chipmunk	Alvin	Mr. Alvin Chipmunk	Alvin	999 South St	St. Louis	MO	63123		
Church	First Baptist	Mr. First Baptist Church	First Baptist	570 Jacksonville Rd	Bellefonte	PA	16823	(814) 555-2369	email@email.com
Clean	Franklin	The Clean Family	Franklin & Betty	123 Cactus Rd	Jersey Shore	PA	17740-1277	(602) 555-1286	fclean@frr.com
Cosmo	Vincent	Vincent Cosmo	Vincent	5151 W 21 St	Columbus	OH	17787	(555) 717-4567	email@email.com
Cruise	Tom	Mr. & Mrs. Tom Cruise	Tom & Michelle	155 Woods Rd	Avis	PA	17721	(901) 555-8905	tomc@techie.net
Fernstein	Scott	Mr. & Mrs. Scott Fernstein	Scott & Dianne	13344 Flower Blvd	Lock Haven	PA	17745	(408) 555-3242	Mail@mail.com
Fletcher	Robert	Mr. & Mrs. Robert Fletcher	Bob & Mary	1234 Orange Ave	Phoenix	PA	85051-1234	(601) 555-9456	rfletcher@tuba.net
Fredderick	Manny	Manny Fredderick	Manny	34 Fifth St	Nazereth	PA	17569	(555) 645-9876	email@email.com
Frompus	Royal & Mary	Royal & Mary Frompus	Rollie & Mary	123 Main St	Lock Haven	PA	17745	(602) 555-5423	Mail@mail.com
Gestapo	Andrew	Mr. & Mrs. Andrew Gestapo	Andrew & Laura	224 Pearl Street	Avis	PA	17725-1255	(313) 555-5234	andrew@servantpc.com

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

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
Last Name	First Name	Batch Date																
Arnold	John	1/14/2007																
Arnold	John	1/14/2007																
Arnold	John	1/14/2007																
Arnold	John	1/14/2007																
Arnold	John	1/21/2007																
Arnold	John	1/21/2007																
Arnold	John	2/4/2007																
Arnold	John	3/4/2007																
Arnold	John	4/15/2007																
Arnold	John	4/15/2007																
Arnold	John	11/11/2007																
Arnold	John	1/1/2008																
Arnold	John	1/1/2008																
Arnold	John	1/6/2008																
Arnold	John	1/13/2008																
Arnold	John	1/13/2008																
Arnold	John	1/13/2008																
Arnold	John	1/20/2008																
Arnold	John	1/20/2008																
Arnold	John	1/4/2009																
Arnold	John	09																
Arnold	John	09																
Arnold	John	09																
Arnold	John	09																
Arnold	John	09																
Arnold	John	09																
Arnold	John	09																
Arnold	John	09																

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

2. Add 'Developer' Tab to Microsoft Excel

- a. In the 'Calculate Potential Donor Scores' Workbook, click 'File' then 'Options' (See Figures 9 & 10)

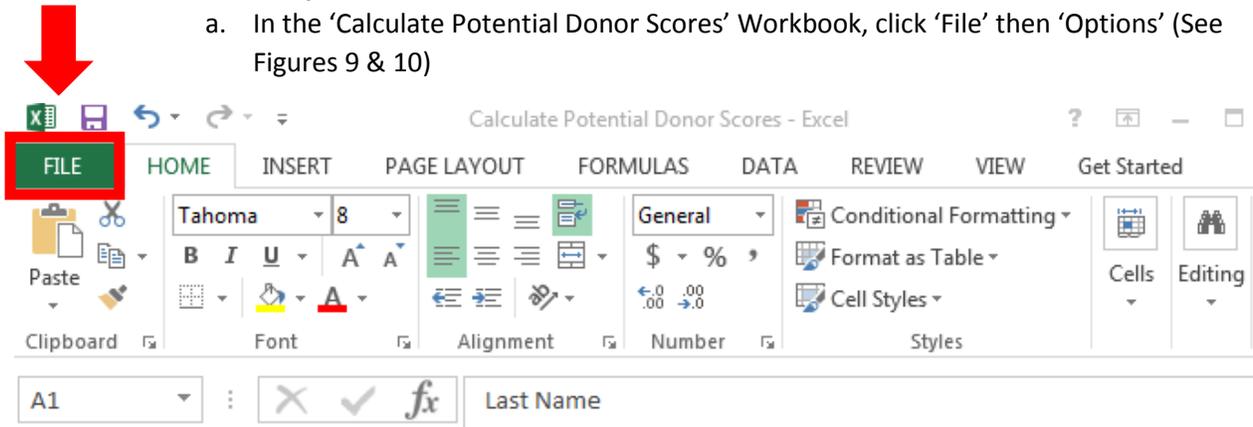


Figure 9 File tab located in the 'Calculate Potential Donor Scores' Workbook

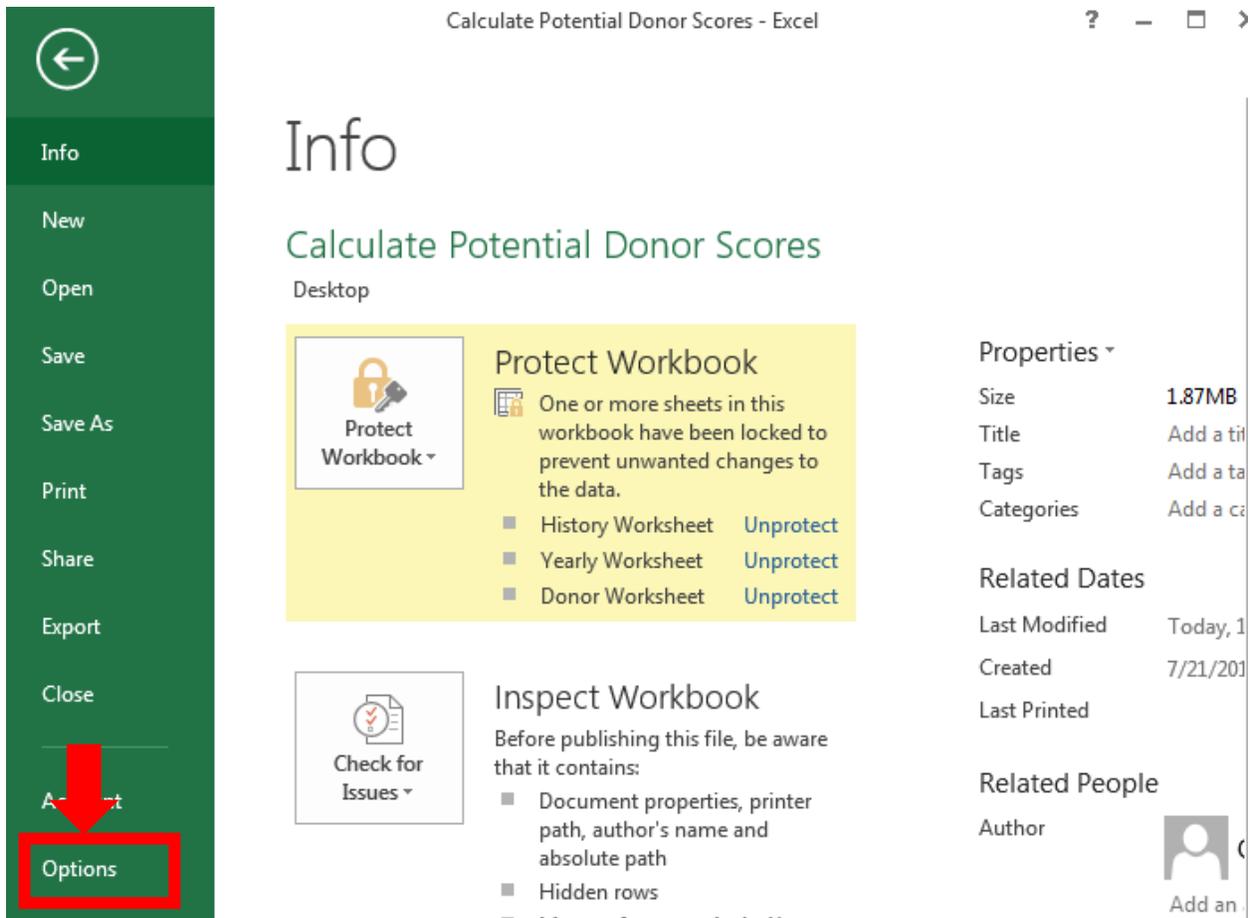


Figure 10 Options located in the 'Calculate Potential Donor Scores' Workbook

- b. 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)

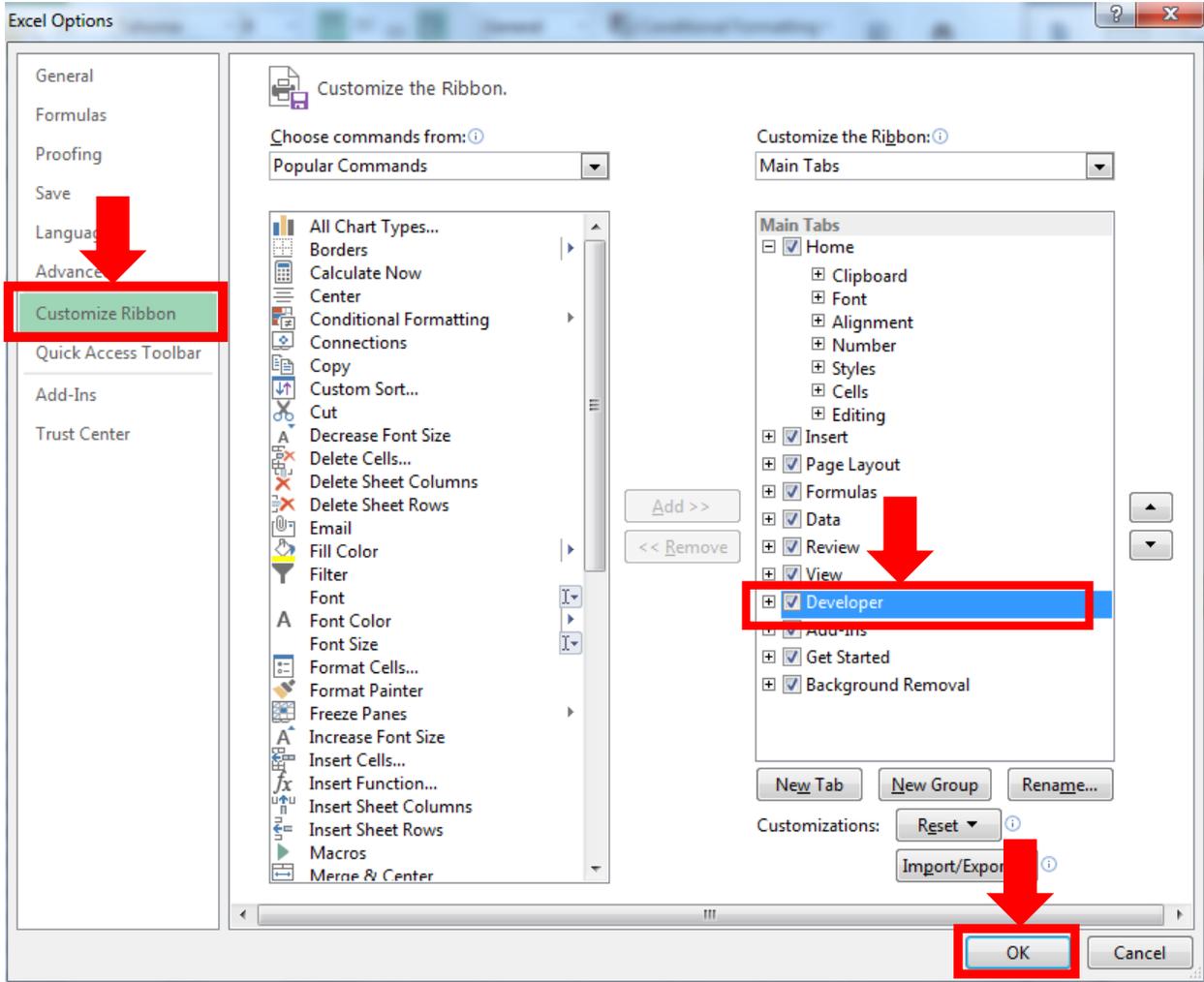


Figure 11 Developer option located in the 'Calculate Potential Donor Scores' Workbook

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

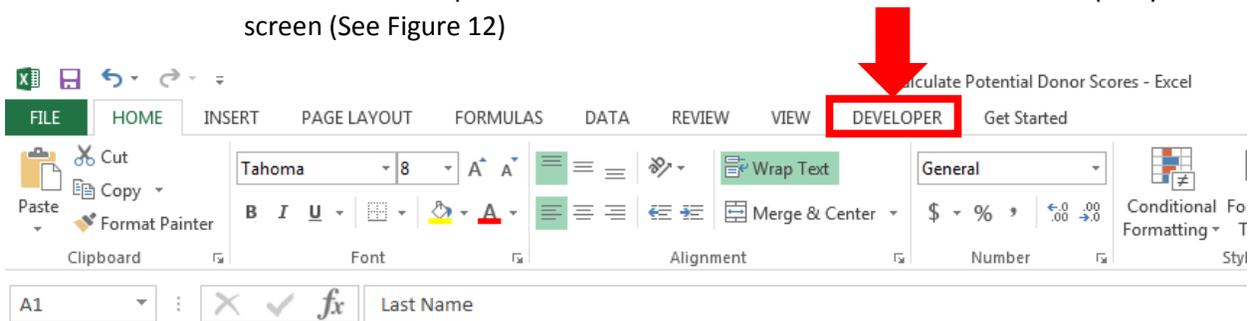


Figure 12 Developer tab located in the 'Calculate Potential Donor Scores' Workbook

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.)

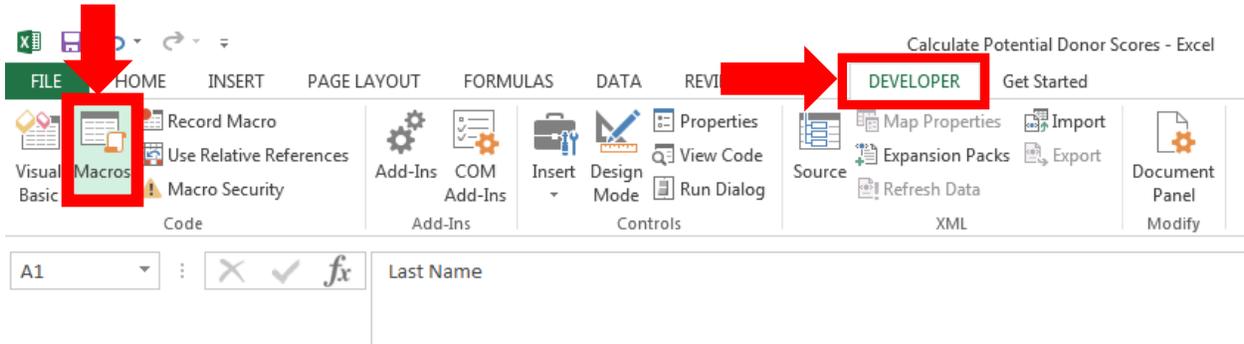


Figure 13 Developer > Macro button located in the 'Calculate Potential Donor Scores' Workbook

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

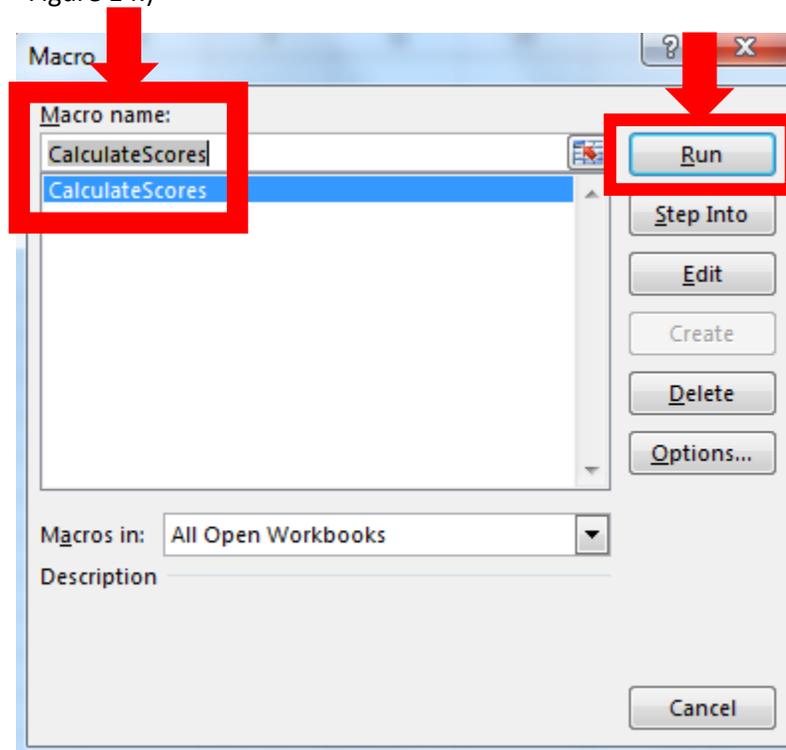


Figure 14 Macro table

- d. *****WARNING*****
 - i. This may take a **LONG** time and Excel may become 'Non Responsive'
 - ii. 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.)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
	Last Name	First Name	Mailing Name	Salvation	Address	City	State	Zip Code	Home Phone	E-Mail	Age Score	Family Status Score	Marital Status Score	Giving History Score	Engagement with Organization Score	Total Score	
2	Scrooge	Ebenezer	Mr. Ebenezer Scrooge	Ebenezer Scrooge	40 Tighwad Way	Mzerty	PA	76755	(407)555-5213	Mail@mail.com	3	3	3	0	9		
3	Plumtree	John	Jack & Sally Plumtree	Jack & Sally	123 Pass Rd	Almon Heaven	NV	70000	Unlisted	Mail@mail.com	3	3	1	0	7		
4	Salman	Harold	Mr. & Mrs. Harry Salman	Harry & Mary	433 Dodge Ave	Williamsport	PA	17701-1276	(717)555-4545	Mail@mail.com	2	3	1	1	7		
5	Bolton	Michael	Mr. & Mrs. Michael Bolton	Michael & Barbie	1234 South St	Nashville	TN	37202-1523	(324)555-5345	Mail@mail.com	1	3	1	1	6		
6	Borge	Victor	Mr. Victor Borge	Victor	47 Main	Look Haven	PA	77745	(555)321-4567	email@email.com	3	2	1	0	6		
7	Breadstren	Sally	Ms. Sally Breadstren	Sally	1544 North 1st Street	Linden	PA	77702	(408)221-4234	Mail@mail.com	0	3	3	0	6		
8	Michall	Mark	Mr. & Mrs. Mike Michall	Mike & Kelly	5 Garth Rd	Avis	PA	17721-1887	(717)555-1983	Mail@mail.com	1	2	1	2	6		
9	Terk	Kenneth	Mr. & Mrs. Ken Terk	Ken & Maureen	7 Dichard Hill Rd	Jersey Shore	PA	17740-1772	(717)555-1293	Mail@mail.com	2	2	1	1	6		
10	Bliner	Jim	Mr. & Mrs. Jim Bliner	Jim & Tammy	202 Hogan Blvd APT11	Mil Hall	PA	77751	Unlisted	john@supercomputergeek.com	0	3	1	1	5		
11	Brady	Karl	Mr. & Mrs. Karl Brady	Karl & Cayte	234 Coyote Ave	Avis	PA	17022-4442	(576)123-4423	Kraig@anist.com	1	3	1	0	5		
12	Chesney	Daniel	Mr. & Mrs. Dave Chesney	Dave & Olga	346 Front Street	Jersey Shore	PA	17740-1766	(717)555-9874	Mail@mail.com	0	3	1	1	5		
13	Clean	Franklin	The Clean Family	Franklin & Betty	123 Cactus Rd	Jersey Shore	PA	17740-1277	(602)555-1286	folean@fri.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	rflerhcn@tuba.net	1	3	1	0	5		
15	Geestapo	Andrew	Mr. & Mrs. Andrew Geestapo	Andrew & Laura	234 Pearl Street	Avis	PA	17725-1255	(313)555-5234	andrew@servantpc.com	0	3	1	1	5		
16	Mutlker	Danson	Mr. & Mrs. Damon Mutlker	Danson & Lisa	885 Fourth Street	Avis	PA	17721-1245	(717)555-9878	Mail@mail.com	1	3	1	0	5		
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		
18	Notenough	Ovville	Mr. & Mrs. Stephanie Notenough	Ovville & Stephanie	44 Oldtimes Way	New ark	NJ	05555-0142	(215)555-1232	onot@tutu.net	3	1	1	0	5		
19	Qswald	Mike	Mr. & Mrs. Mike Qswald	Mike & Sarah	200 Computer Lane	State College	PA	78777	(314)555-3948	mjosbo@yahoo.com	0	3	1	1	5		
20	Smith	Jonathan	Jonathan & Maryanne Smith	Jon & Maryanne	375 S. Main Street	Jersey Shore	PA	17740-1723	(555)308-1334	LoisSevan@pc@aol.com	1	3	1	0	5		
21	Arnold	John	Mr. & Mrs. Jim Arnold	Jim	300 Front Street, Apt 1	Lock Haven	PA	17745	(717)555-1234	Jim@mail.com	0	1	1	2	4		
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		email@email.com	0	3	1	0	4		
24	Church	First Baptist	First Baptist Church	First Baptist	570 Jacksonville Rd	Ballentine	PA	76823	(814)555-2369	email@email.com	0	3	1	0	4		
25	Cosmo	Vincent	Vincent Cosmo	Vincent	5151 W 21 St	Columbus	OH	77787	(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	77721	(901)555-8905	tomc@techie.net	0	3	1	0	4		
27	Gulfeinhausner	Dwight	Dr. Dwight Gulfeinhausner	Dwight	123 Main	Sunnydale	PA	72345	(555)947-8946	email@email.com	0	3	1	0	4		
28	Hanson	Man	Mr. & Mrs. Matt Hanson	Man & Corrie	1234 Ten Rd	Valeville	PA	77742	(555)704-4548	Mail@mail.com	0	3	1	0	4		
29	Jackson	Edward	Ed & Patricia Jackson	Ed & Patricia	1234 Main St	Phoenix	AZ	85021-1887	Unlisted	Mail@mail.com	0	3	1	0	4		
30	Knight	Michael	Michael Knight	Michael	80 S Television St	Holly Wood	CA	93939	(866)555-4567	email@email.com	0	3	1	0	4		
31	Lynn	Fred	Fred and Marsha Lynn	Fred and Marsha	20 South St	Albany	NY	72203	(555)487-8994	email@email.com	0	3	1	0	4		
32	MacMillen	Tom	Mr. & Mrs. Tom MacMillen	Tom & Wendy	East St	Elizabethtown	PA	76972	(555)849-7994	email@email.com	0	3	1	0	4		
33	Man	Tim	Tim and Martha Man	Tim and Martha	98 South St	Dallas	TX	75496	(555)987-4564	email@email.com	0	3	1	0	4		
34	Morey	Thomas	Tom & Joyce Morey	Tom & Joyce	233 Mountain Ave	Linden	TX	7742-3422	(412)555-4545	Mail@mail.com	0	3	1	0	4		
35	Muñoz	Anthony	Anthony Muñoz	Anthony	100 Bengals Dr	Cincinnati	OH	45288-1236	(555)845-1234	email@email.com	0	3	1	0	4		
36	Ned	Needlehead	Needlehead Ned	Needlehead	8 Down St	Nacereeth	CA	76529	(555)845-1934	email@email.com	0	3	1	0	4		
37	Newsham	Ronald	Ronald & Darlene Newsham	Ronald & Darlene	734 Markham Ave	St. Louis	MO	63124	(314)555-2342	Mail@mail.com	0	3	1	0	4		

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