

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.

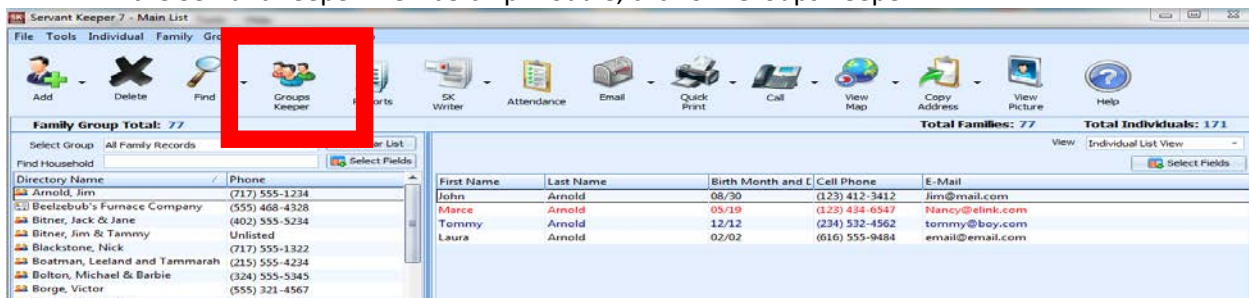
To ensure an accurate assessment of the donors, please review the Servant Keeper file and verify that all fields contain valid data for registered parishioners. Pay particular attention to the Age (which requires a birthdate to be entered) and Marital Status fields.

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'.

The screenshot shows the 'Add/Edit Group' window with the following elements highlighted in red:

- Enter the Group Name:** Donor List
- Show:** Individuals (selected)
- Show Fields for:** Show Individual Fields
- Criteria Table:**

(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		

Below the criteria table is a large empty table for additional criteria.

On the right side, the **Select Fields** button is highlighted in red. Below it is a list of fields: Last Name, First Name, Mailing Name, Salutation, Address, City, State, Zip Code, Home Phone, E-Mail, and a scroll bar.

At the bottom, there is a checkbox for 'Include Disabled Records', a 'Group Category' dropdown set to 'System Group', and 'Save' and 'Close' buttons.

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

- ACA
- Activities
- Address
- Address Unlisted
- Address Unlisted
- Allergies
- Allergy
- Alt Address
- Alt Address
- Alt Address Unlisted
- Alt Address Unlisted
- Alt Carrier Sort

Add

Remove

Fields Displayed in Order

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

Up

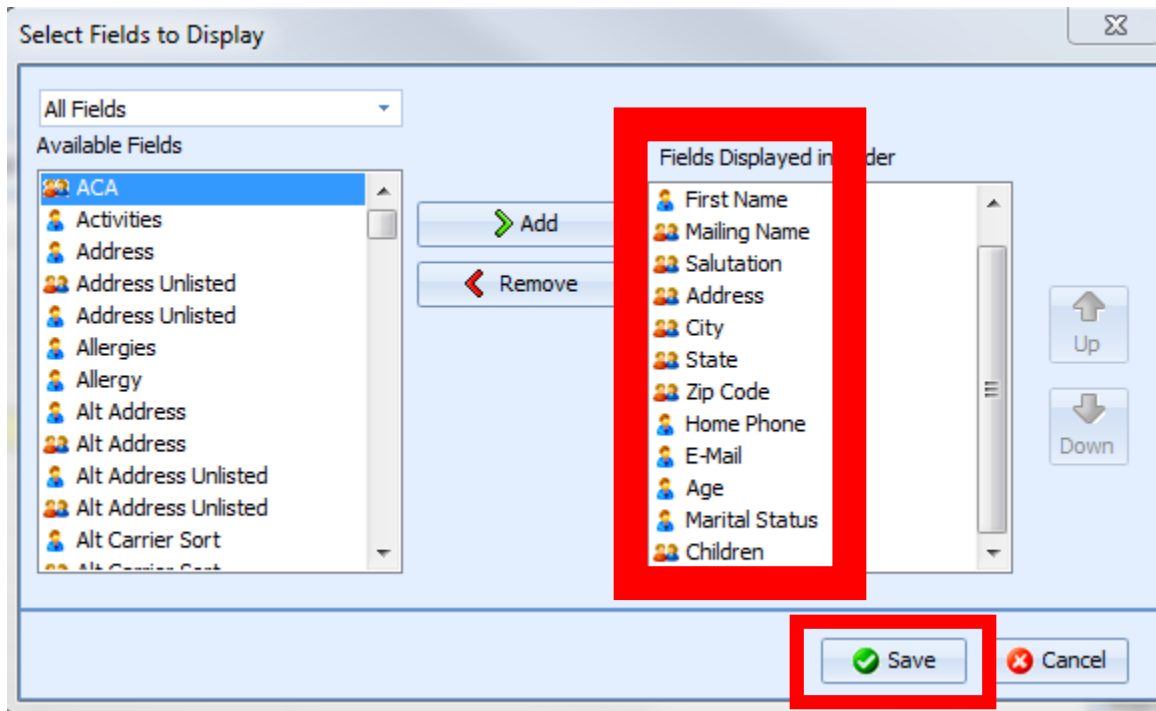
Down

Save

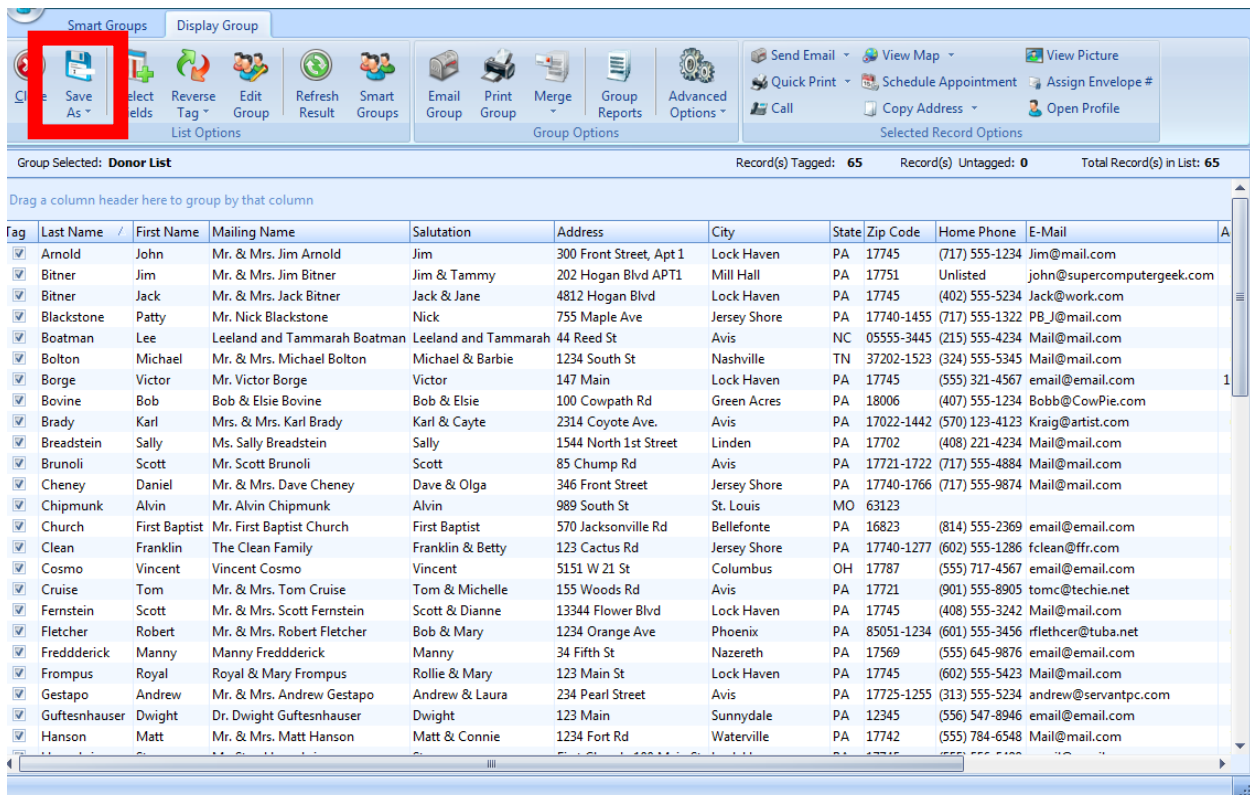
Cancel

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

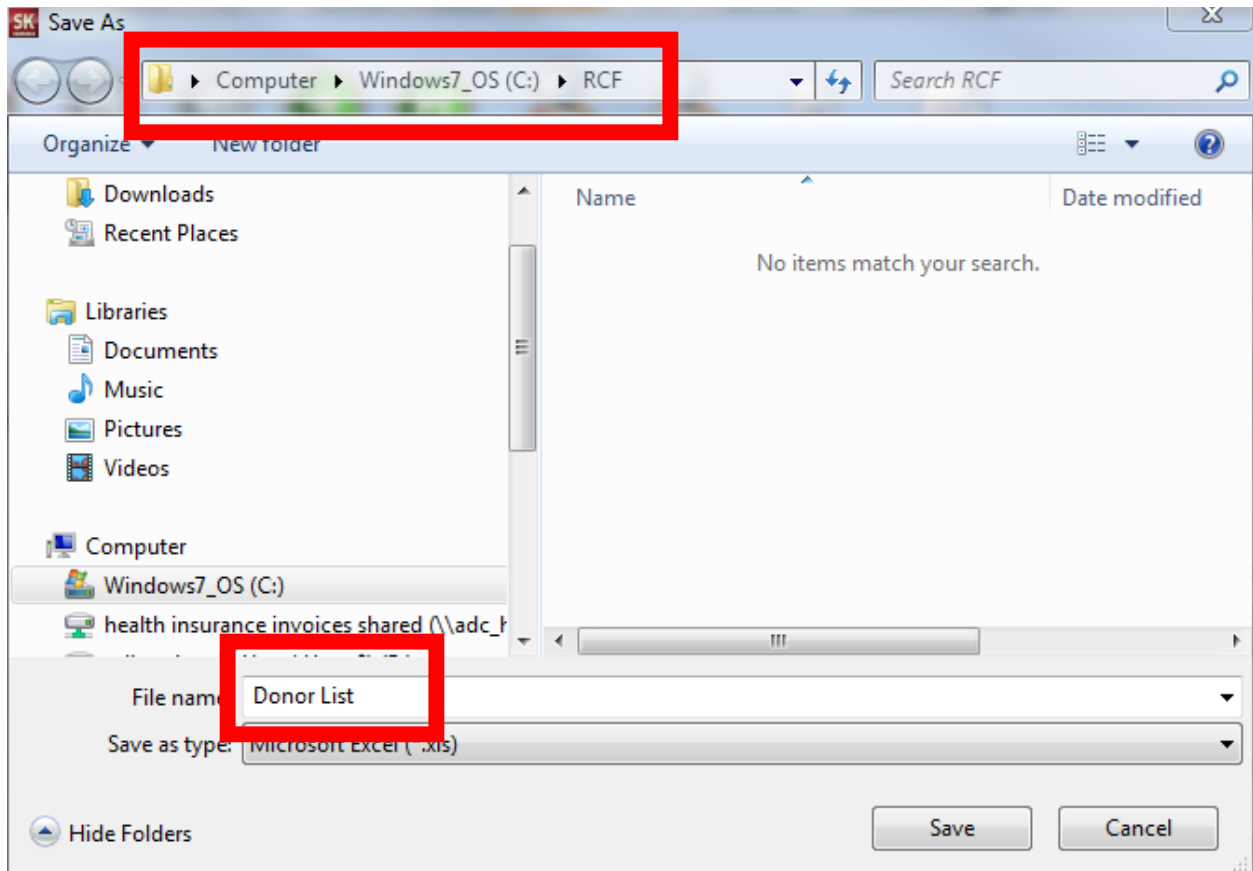
7 – Click 'Save'.



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



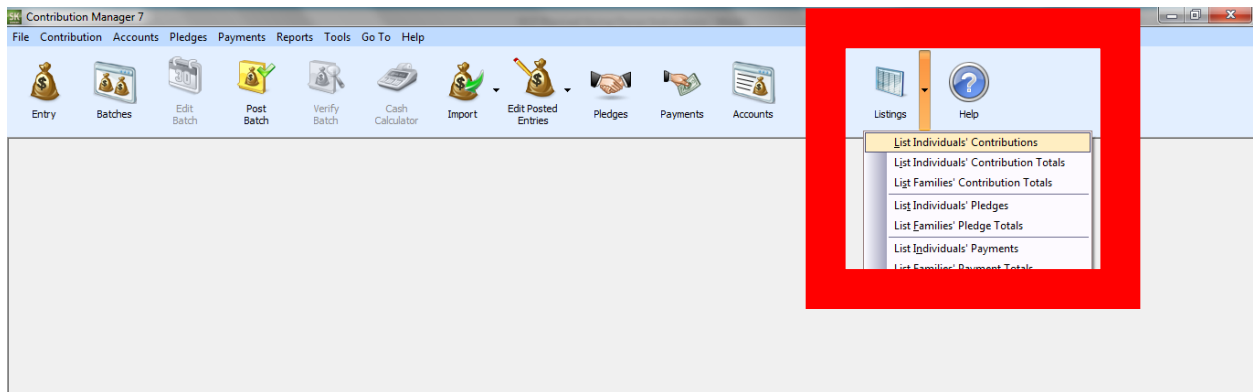
9 – Enter 'Donor List' as the file name and save in the preferred folder. Click 'Save'.



This completes pulling the data from the Membership module.

Creating the Donor History in Servant Keeper:

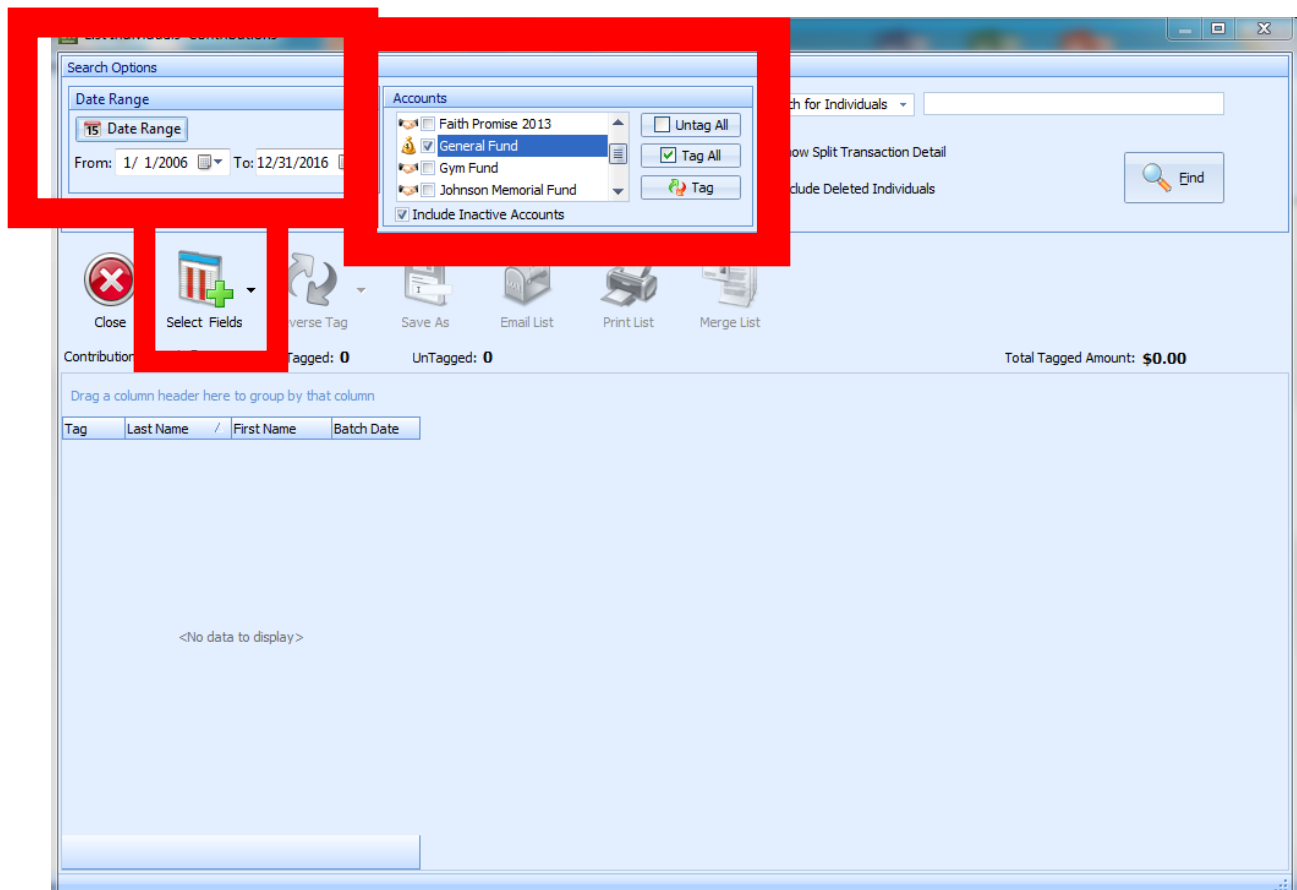
1. In the Servant Keeper Contribution module, click on 'Listings' then 'List Individual's Contributions'.



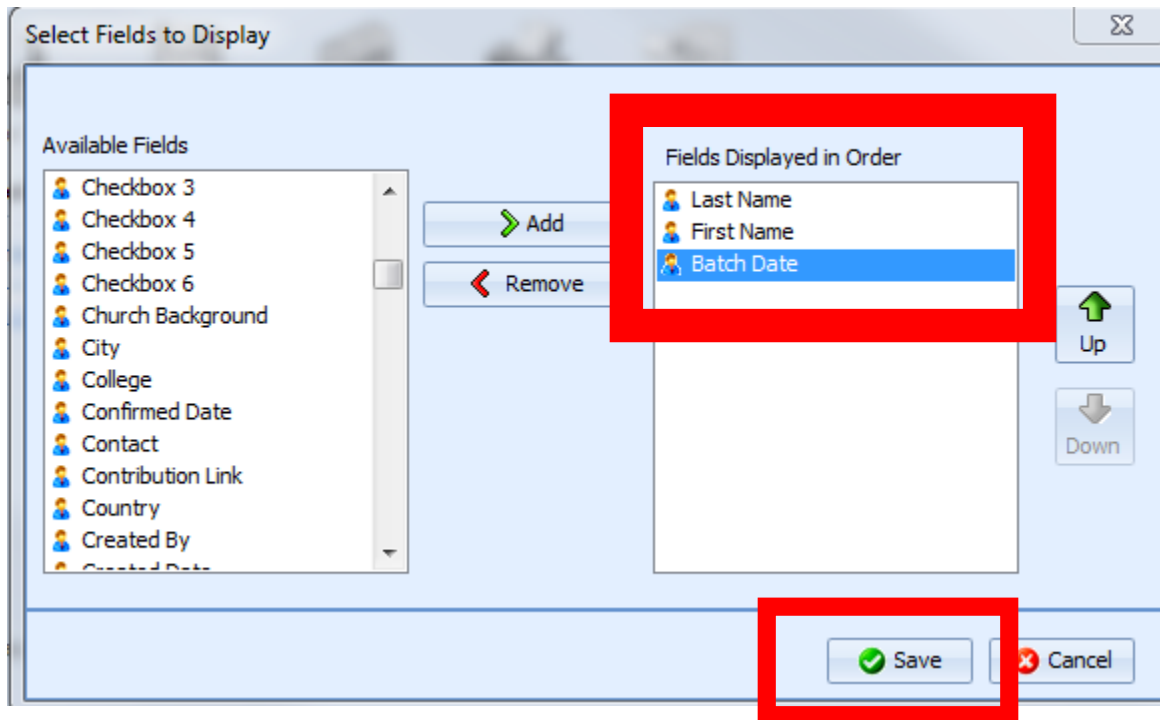
2 – Change the 'Date Range' to include the last 10 full calendar years, ex. 01/01/2006 – 12/31/2016.

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

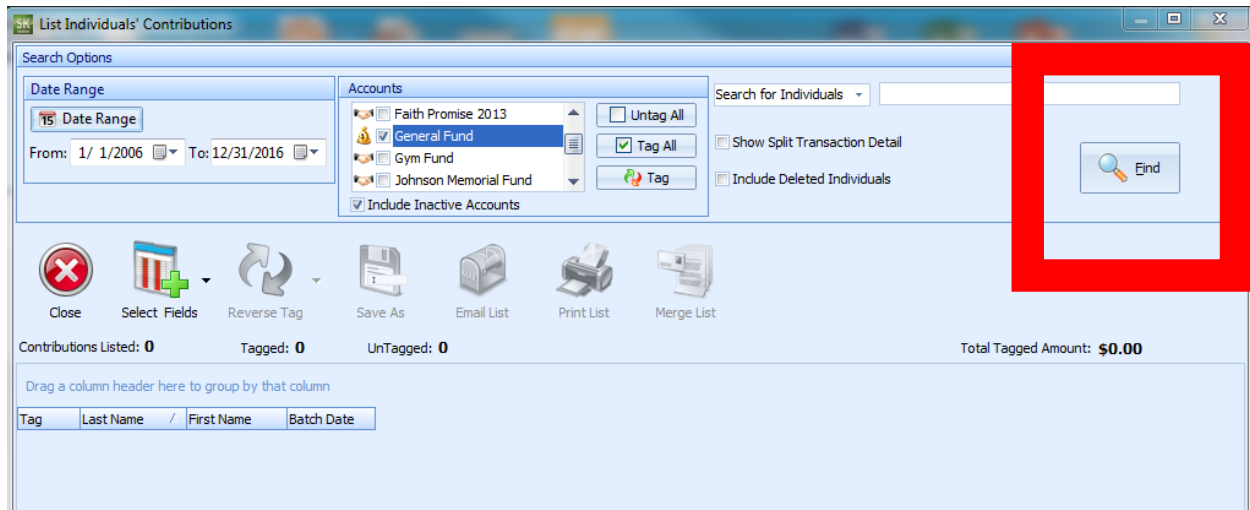
4 – Click on 'Select Fields'.



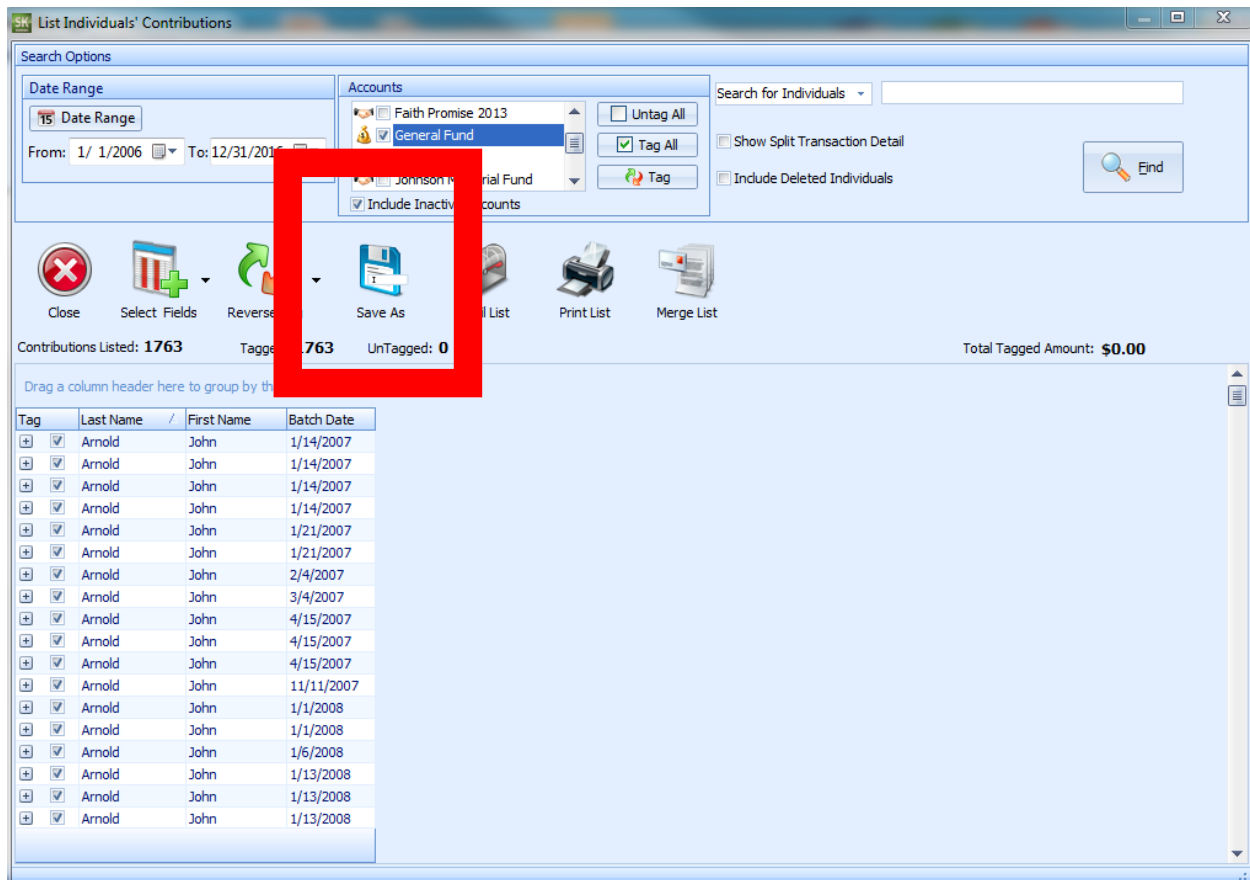
5 – Add or remove fields as needed so that only the Last Name, First Name and Batch Date are included in the 'Fields Displayed in Order' box. The fields MUST appear in the given order. Click 'Save'.



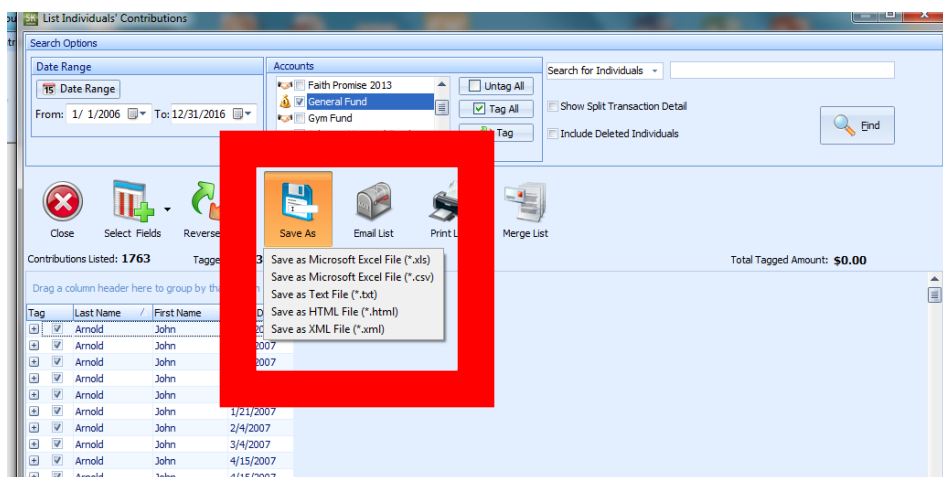
6 – Click 'Find' to complete the report. (This may take quite a few minutes depending on the file size.)



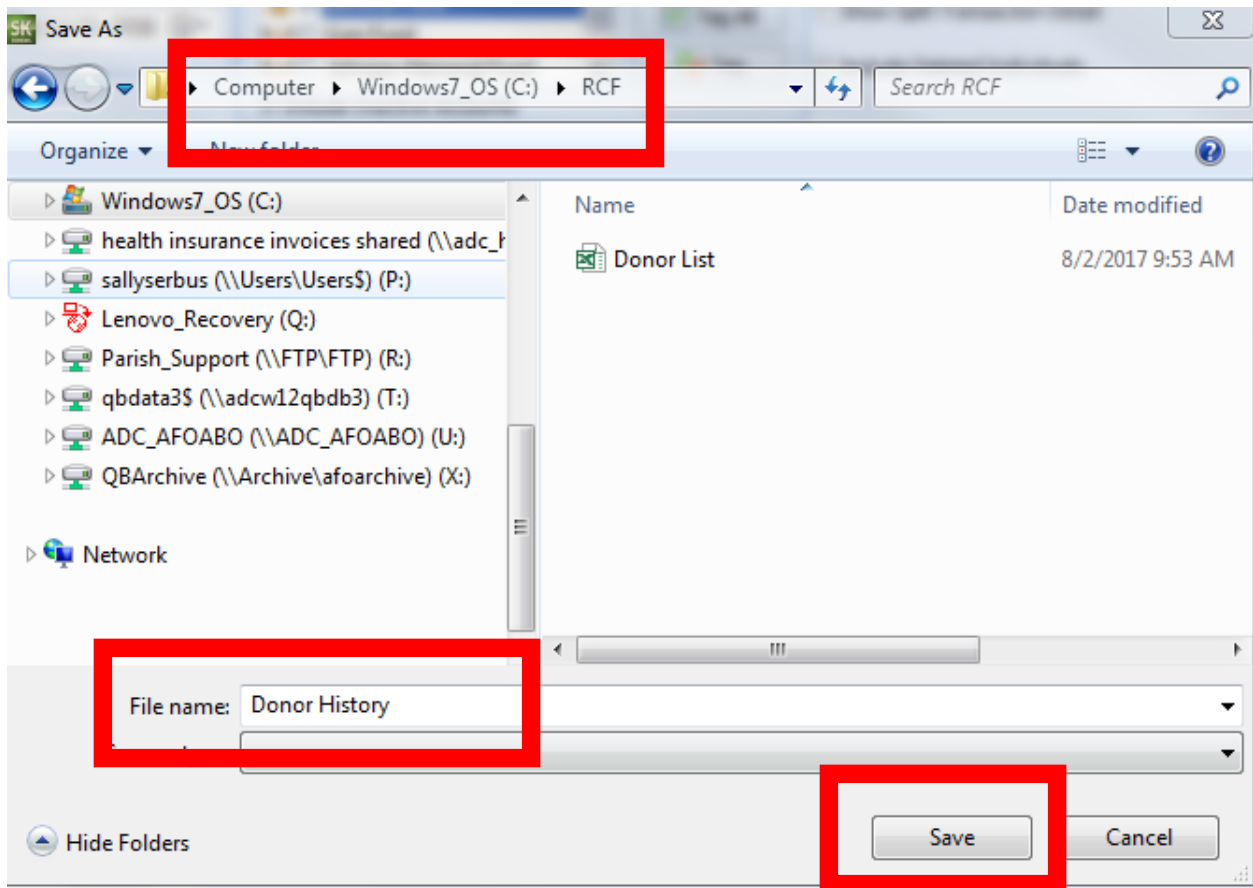
7 – Once the report populates, Click ‘Save As’.



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



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

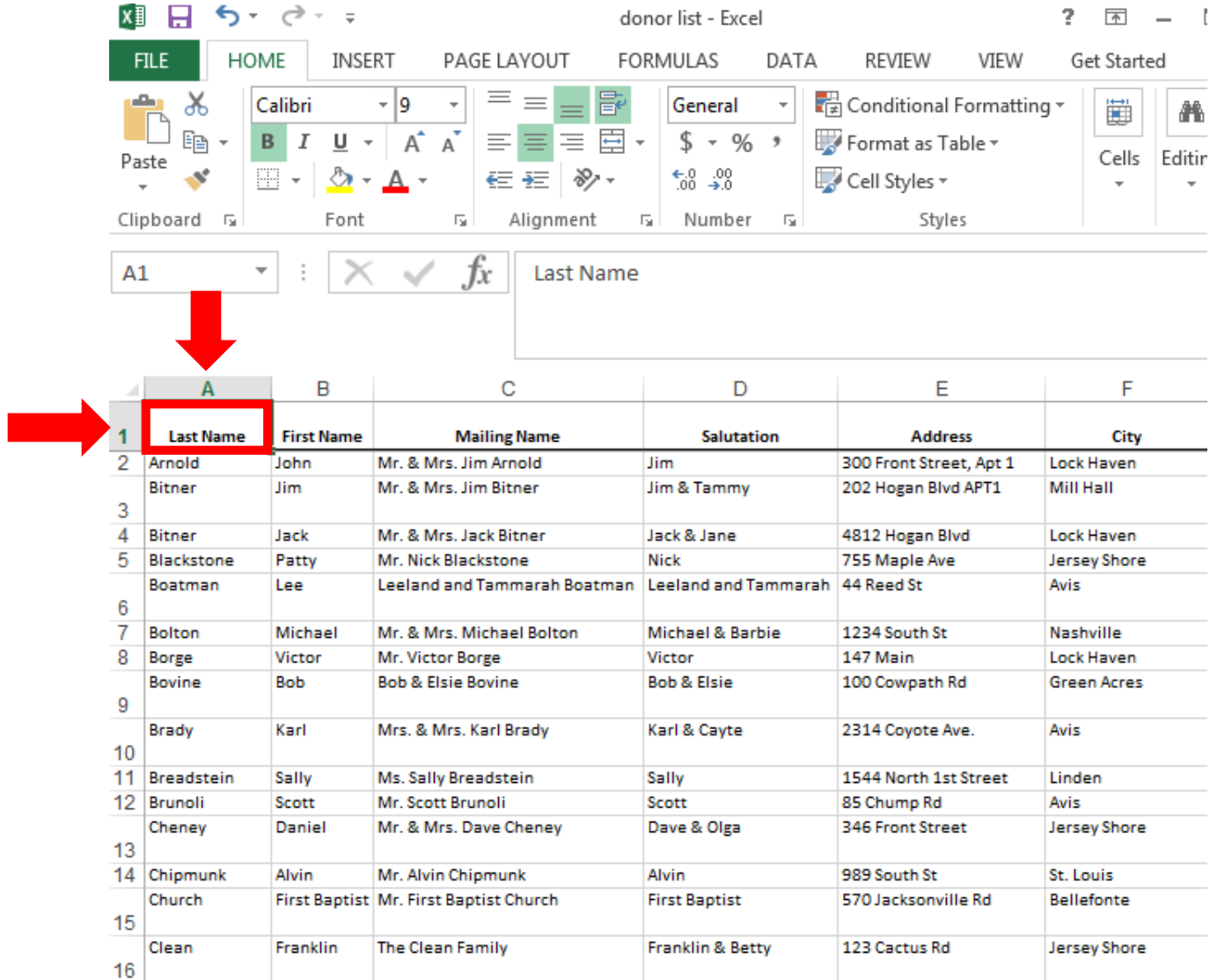


This completes pulling the data from the Contribution module.

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
	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.)

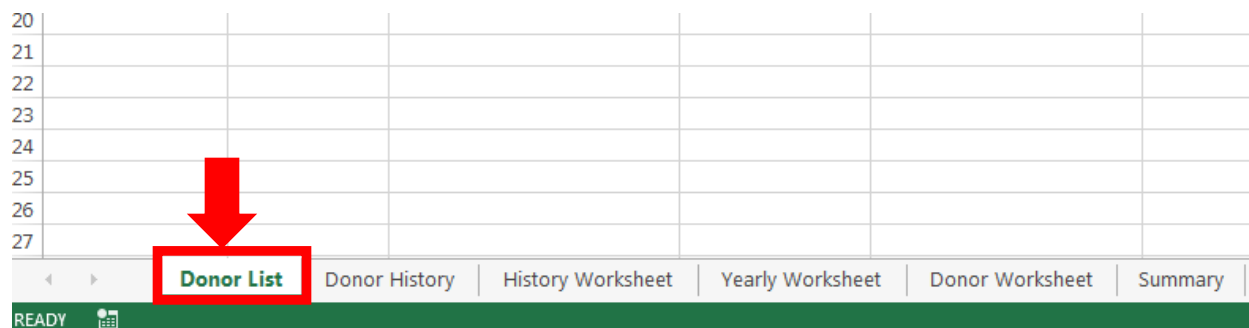


Figure 2 'Donor List' tab located on the 'Calculate Potential Donor Scores' Workbook

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

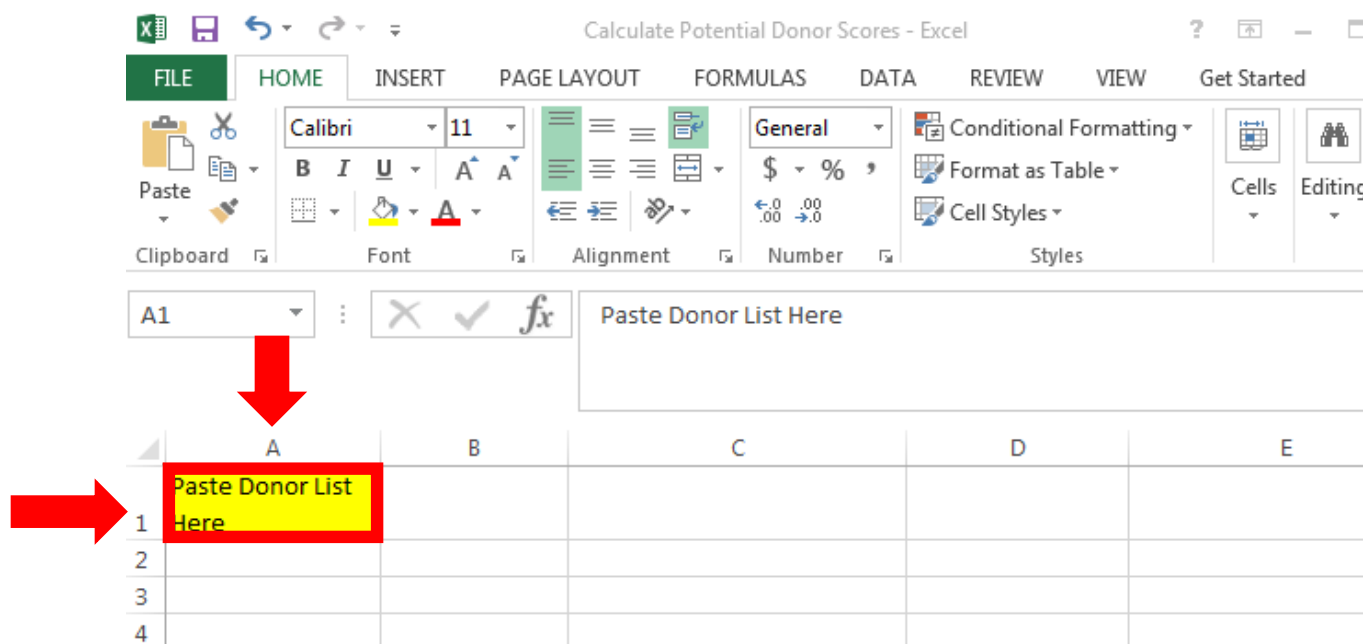


Figure 3 Cell "A1" located on the Donor List tab in the 'Calculate Potential Donor Scores' Workbook

- 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.)

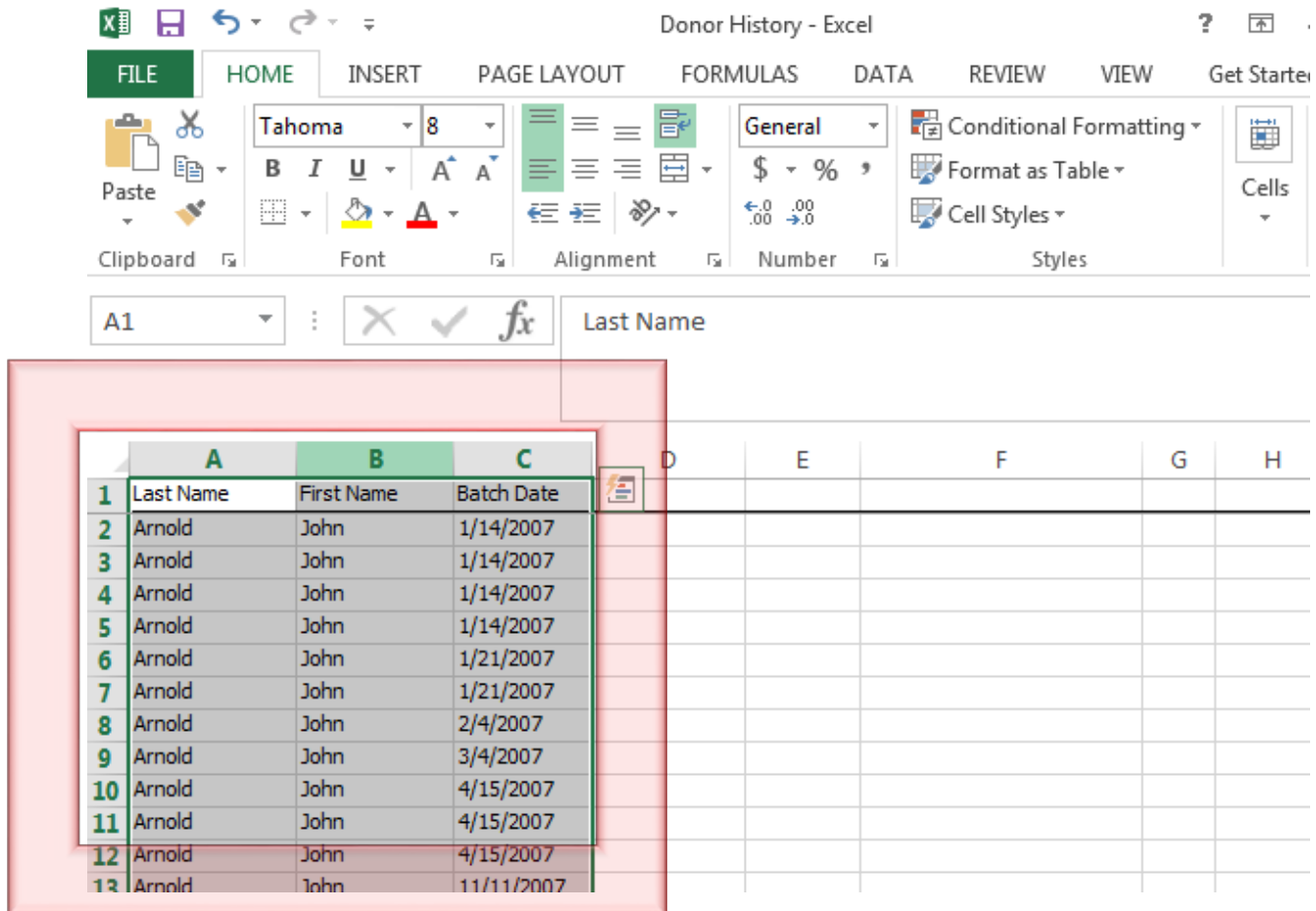


Figure 4 Selected Used Range from the Donor History exported from Servant Keeper

- 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.)

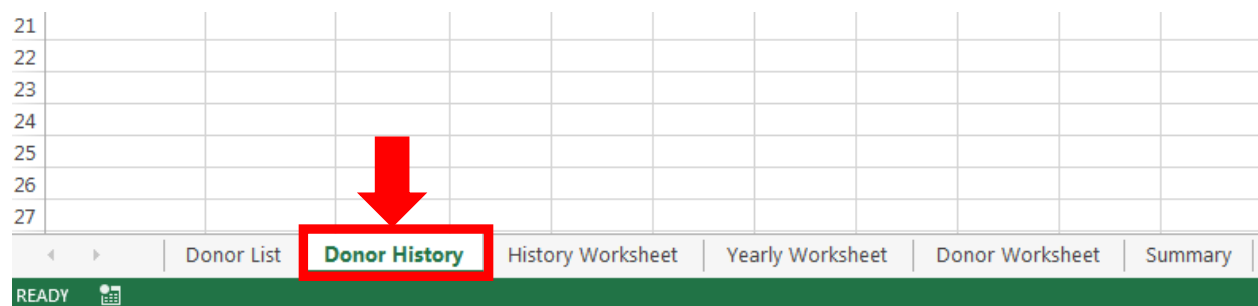


Figure 5 'Donor History' tab located in the 'Calculate Potential Donor Scores' Workbook

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

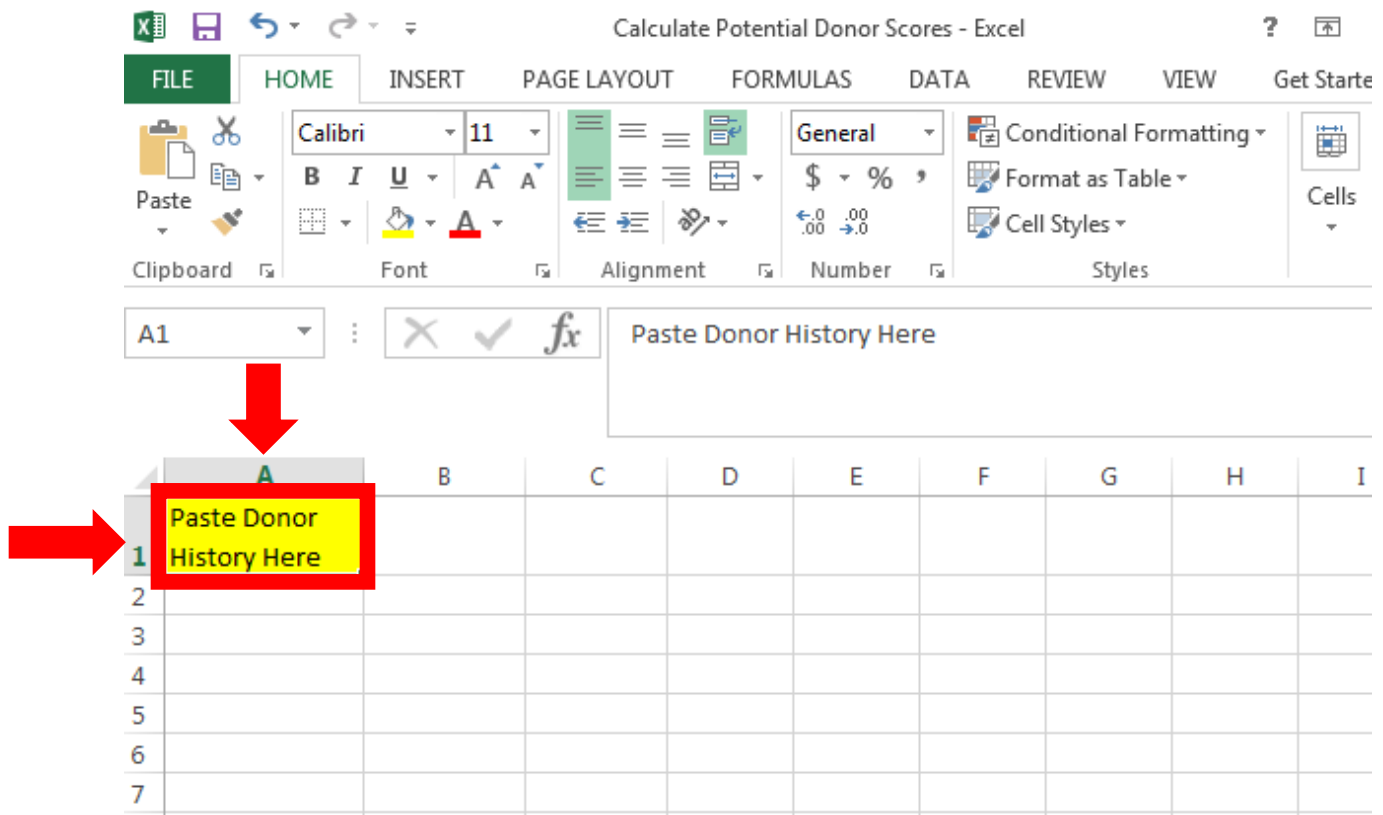
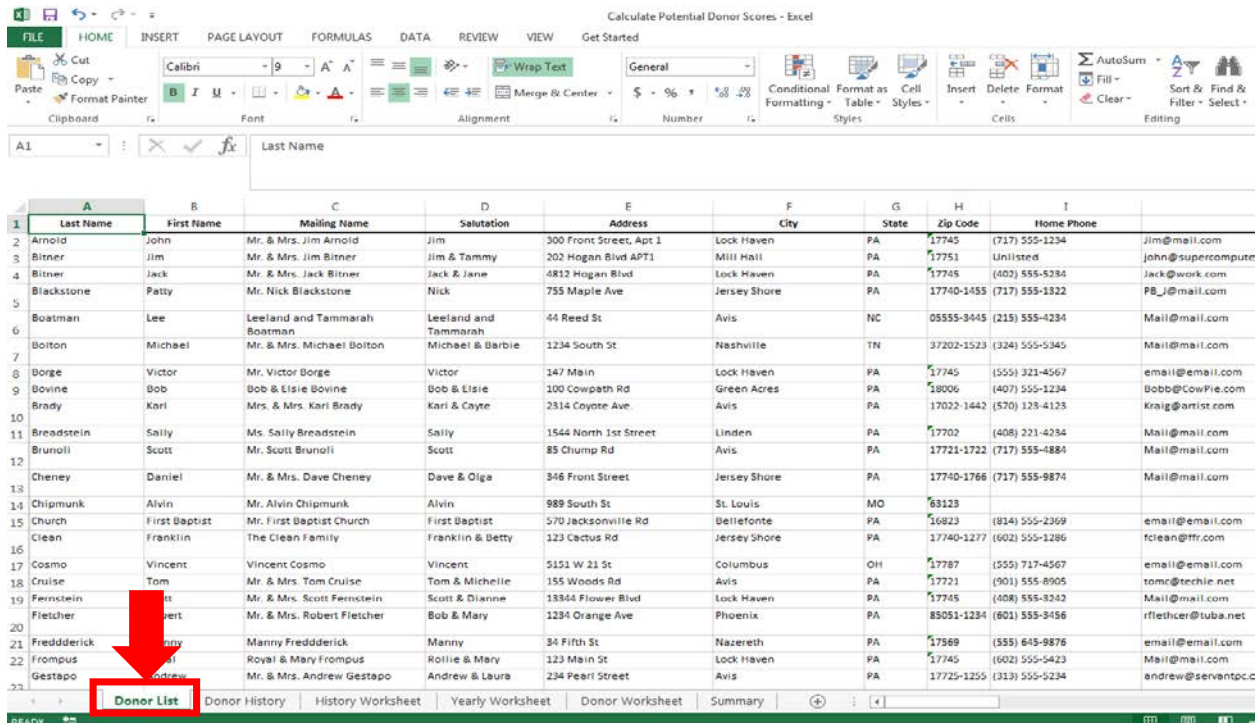


Figure 6 Cell "A1" located in the 'Donor History' tab in the 'Calculate Potential Donor Scores' Workbook

- 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)

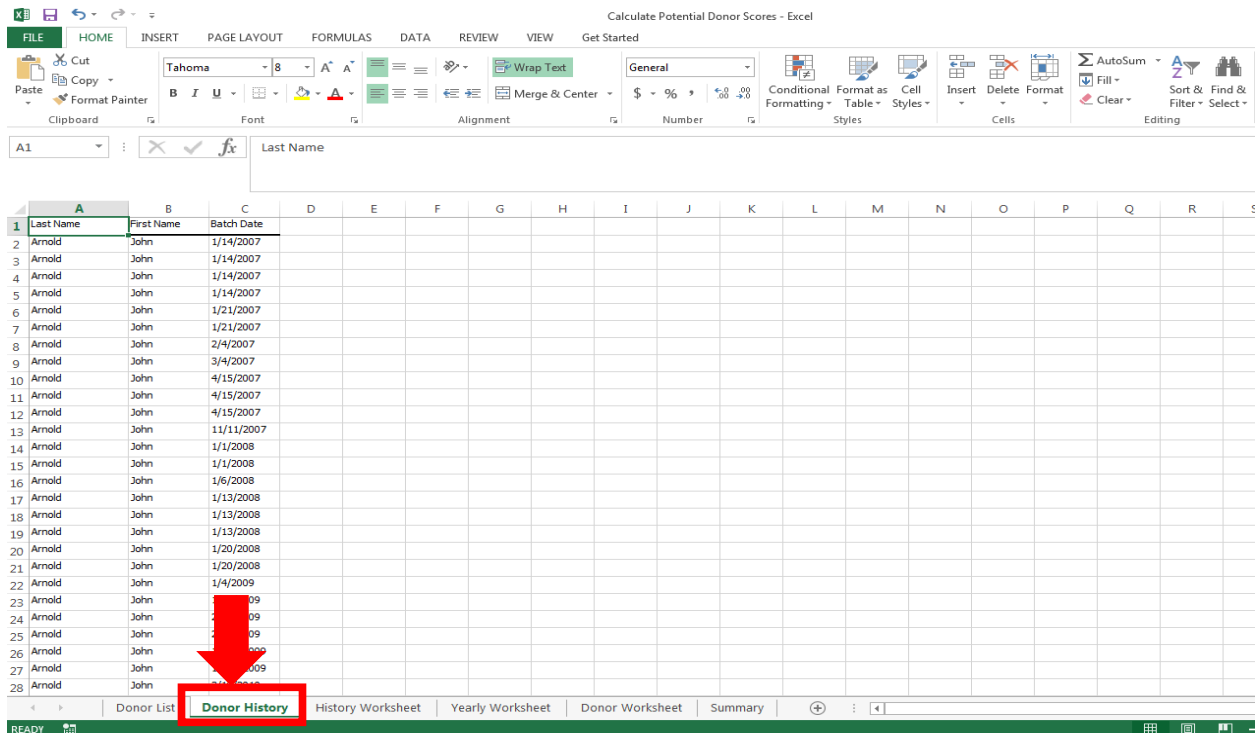


Calculate Potential Donor Scores - Excel

A	B	C	D	E	F	G	H	I	J
Last Name	First Name	Mailing Name	Salutation	Address	City	State	Zip Code	Home Phone	
1	Arnold	John	Mr. & Mrs. Jim Arnold	Jim	300 Front Street, Apt 1	Lock Haven	PA 17745	(717) 555-1234	Jim@mail.com
2	Bitner	Jim	Mr. & Mrs. Jim Bitner	Jim & Tammy	202 Hogan Blvd APT1	Mill Hall	PA 17751	Unlisted	john@supercompute
3	Bitner	Jack	Mr. & Mrs. Jack Bitner	Jack & Jane	4812 Hogan Blvd	Lock Haven	PA 17745	(402) 555-5284	Jack@work.com
4	Blackstone	Patty	Mr. Nick Blackstone	Nick	755 Maple Ave	Jersey Shore	PA 17740-1455	(717) 555-1322	PB_J@mail.com
5	Boatman	Lee	Leeland and Tammarah	Leeland and Tammarah	44 Reed St	Avis	NC 05555-9445	(215) 555-4234	Mail@mail.com
6	Boiton	Michael	Mr. & Mrs. Michael Boiton	Michael & Barbie	1234 South St	Nashville	TN 37202-1523	(324) 555-5345	Mail@mail.com
7	Borge	Victor	Mr. Victor Borge	Victor	147 Main	Lock Haven	PA 17745	(555) 321-4567	email@email.com
8	Bovine	Bob	Bob & Elsie Bovine	Bob & Elsie	100 Cowpath Rd	Green Acres	PA 18006	(407) 555-1234	Bobb@CowPie.com
9	Brady	Karl	Mrs. & Mrs. Karl Brady	Karl & Cayte	2314 Coyote Ave	Avis	PA 17022-1442	(570) 123-4123	Kraig@artist.com
10	Breadstein	Sally	Mrs. Sally Breadstein	Sally	1544 North 1st Street	Linden	PA 17702	(408) 221-4234	Mail@mail.com
11	Brunoli	Scott	Mr. Scott Brunoli	Scott	85 Chump Rd	Avis	PA 17721-1721	(717) 555-4884	Mail@mail.com
12	Cheney	Daniel	Mr. & Mrs. Dave Cheney	Dave & Olga	348 Front Street	Jersey Shore	PA 17740-1766	(717) 555-9874	Mail@mail.com
13	Chipmunk	Alvin	Mr. Alvin Chipmunk	Alvin	989 South St	St. Louis	MO 63123		
14	Church	First Baptist	Mr. First Baptist Church	First Baptist	570 Jacksonville Rd	Bellefonte	PA 16823	(814) 555-2369	email@email.com
15	Clean	Franklin	The Clean Family	Franklin & Betty	123 Cactus Rd	Jersey Shore	PA 17740-1277	(602) 555-1286	fclean@frr.com
16	Cosmo	Vincent	Vincent Cosmo	Vincent	5151 W 21 St	Columbus	OH 17787	(555) 717-4567	email@email.com
17	Cruise	Tom	Mr. & Mrs. Tom Cruise	Tom & Michelle	155 Woods Rd	Avis	PA 17721	(901) 555-8905	tom@techie.net
18	Fernstein	Scott	Mr. & Mrs. Scott Fernstein	Scott & Dianne	13844 Flower Blvd	Lock Haven	PA 17745	(408) 555-3242	Mail@mail.com
19	Fletcher	Robert	Mr. & Mrs. Robert Fletcher	Bob & Mary	1234 Orange Ave	Phoenix	PA 85051-1234	(601) 555-9456	rfletcher@tuba.net
20	Fredderick	Manny	Manny Fredderick	Manny	34 Fifth St	Nazereth	PA 17569	(555) 645-9876	email@email.com
21	Frompus	Royal	Royal & Mary Frompus	Rollie & Mary	123 Main St	Lock Haven	PA 17745	(602) 555-5423	Mail@mail.com
22	Gestapo	Andrew	Mr. & Mrs. Andrew Gestapo	Andrew & Laurie	234 Pearl Street	Avis	PA 17725-1255	(313) 555-5234	andrew@servantpc.com

Donor List Donor History History Worksheet Yearly Worksheet Donor Worksheet Summary

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



Calculate Potential Donor Scores - Excel

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																
1	Arnold	John	1/14/2007															
2	Arnold	John	1/14/2007															
3	Arnold	John	1/14/2007															
4	Arnold	John	1/14/2007															
5	Arnold	John	1/21/2007															
6	Arnold	John	2/4/2007															
7	Arnold	John	3/4/2007															
8	Arnold	John	4/15/2007															
9	Arnold	John	4/15/2007															
10	Arnold	John	11/11/2007															
11	Arnold	John	1/1/2008															
12	Arnold	John	1/1/2008															
13	Arnold	John	1/6/2008															
14	Arnold	John	1/13/2008															
15	Arnold	John	1/13/2008															
16	Arnold	John	1/20/2008															
17	Arnold	John	1/20/2008															
18	Arnold	John	1/4/2009															
19	Arnold	John	1/4/2009															
20	Arnold	John	1/4/2009															
21	Arnold	John	1/4/2009															
22	Arnold	John	1/4/2009															
23	Arnold	John	1/4/2009															
24	Arnold	John	1/4/2009															
25	Arnold	John	1/4/2009															
26	Arnold	John	1/4/2009															
27	Arnold	John	1/4/2009															
28	Arnold	John	1/4/2009															

Donor List Donor History History Worksheet Yearly Worksheet Donor Worksheet Summary

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)

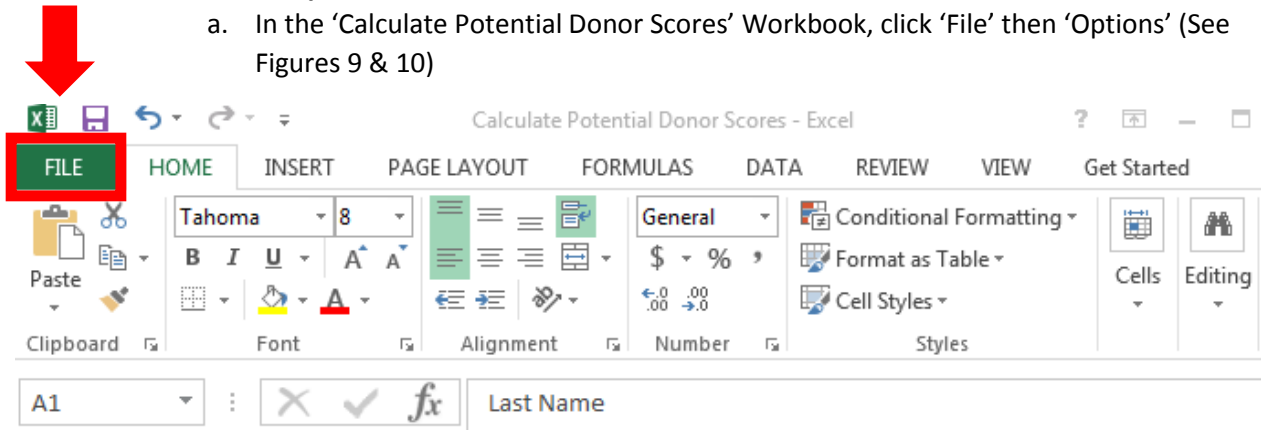


Figure 9 File tab located in the 'Calculate Potential Donor Scores' Workbook

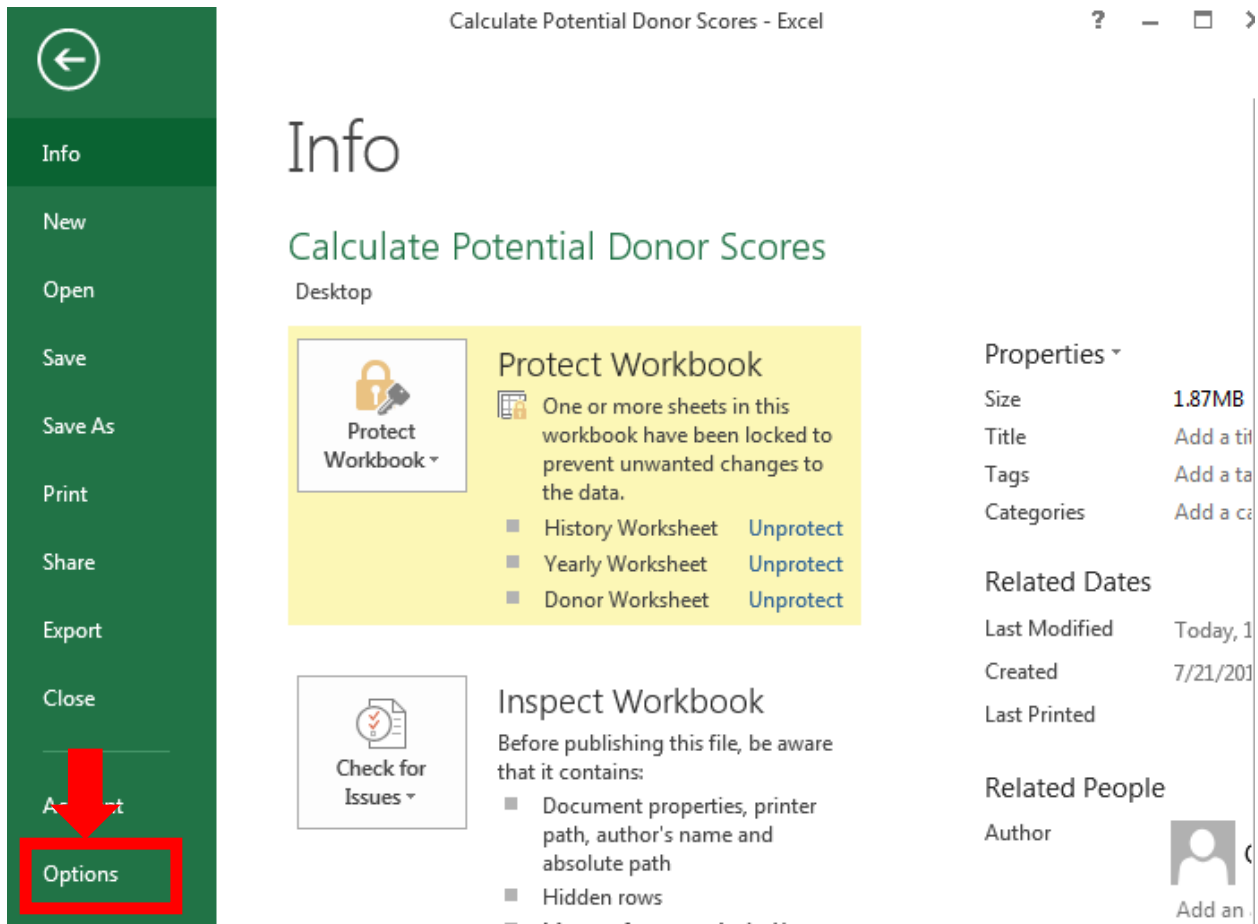


Figure 10 Options located in the 'Calculate Potential Donor Scores' Workbook

- 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)

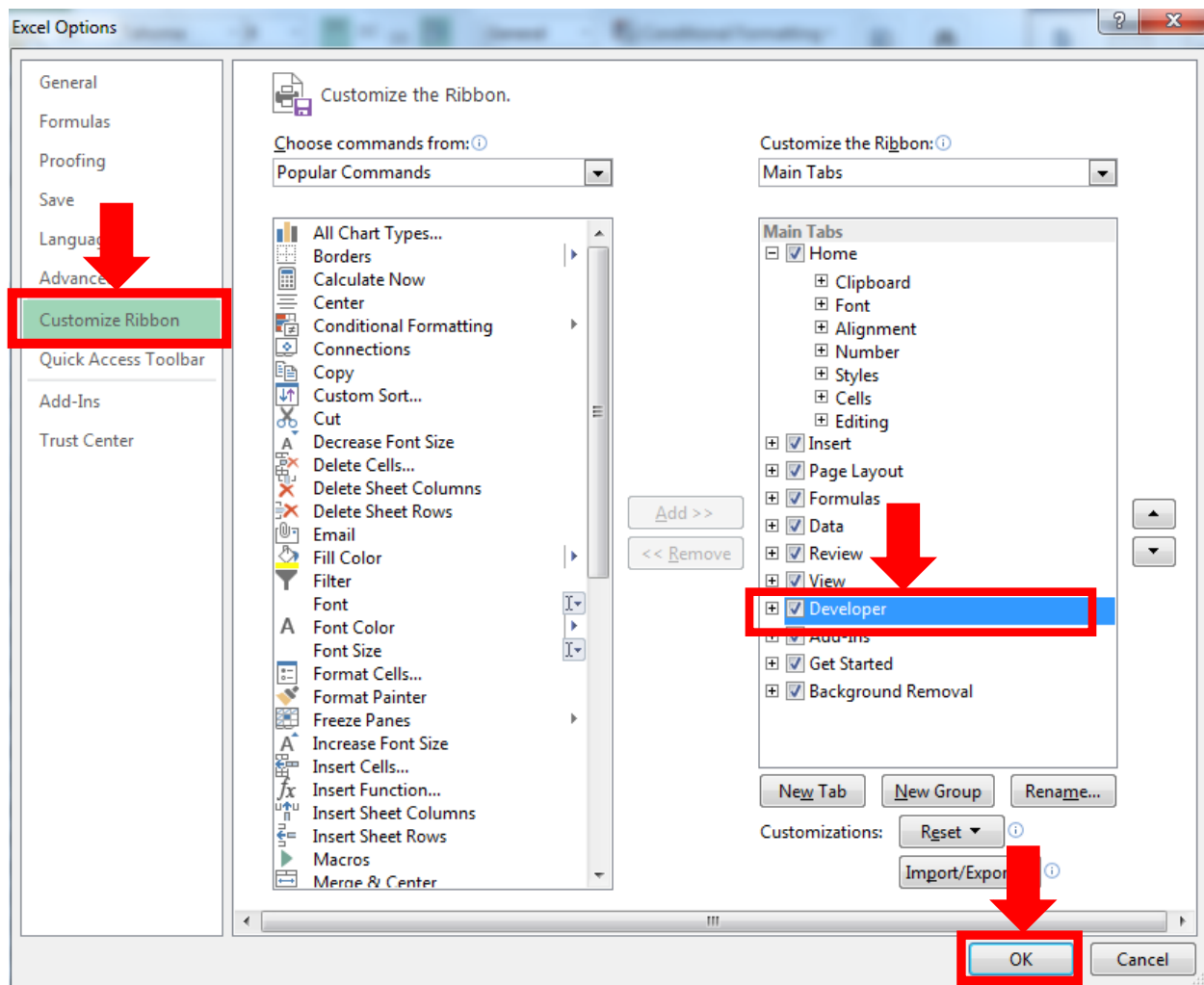


Figure 11 Developer option located in the 'Calculate Potential Donor Scores' Workbook

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

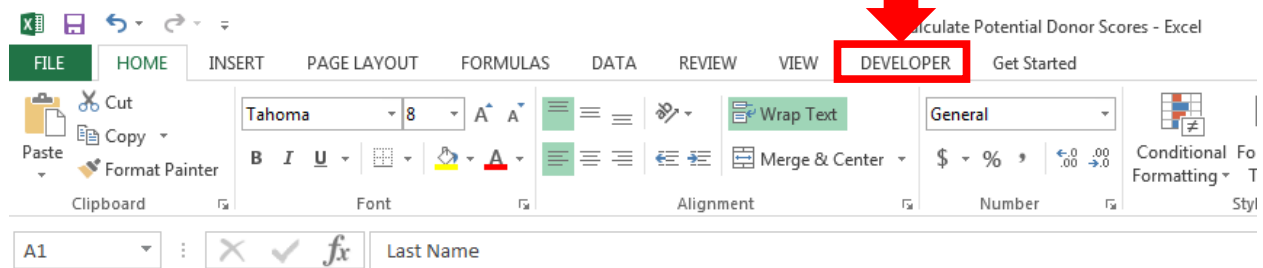


Figure 12 Developer tab located in the 'Calculate Potential Donor Scores' Workbook

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.)

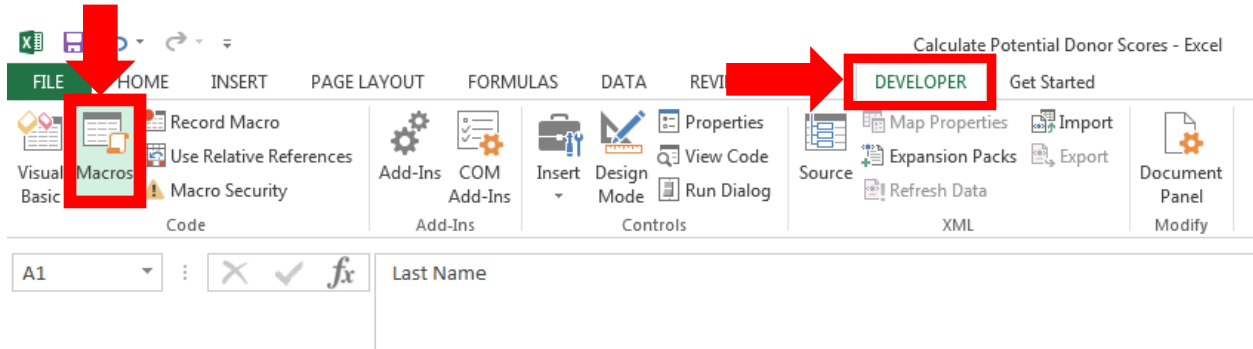


Figure 13 Developer > Macro button located in the 'Calculate Potential Donor Scores' Workbook

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

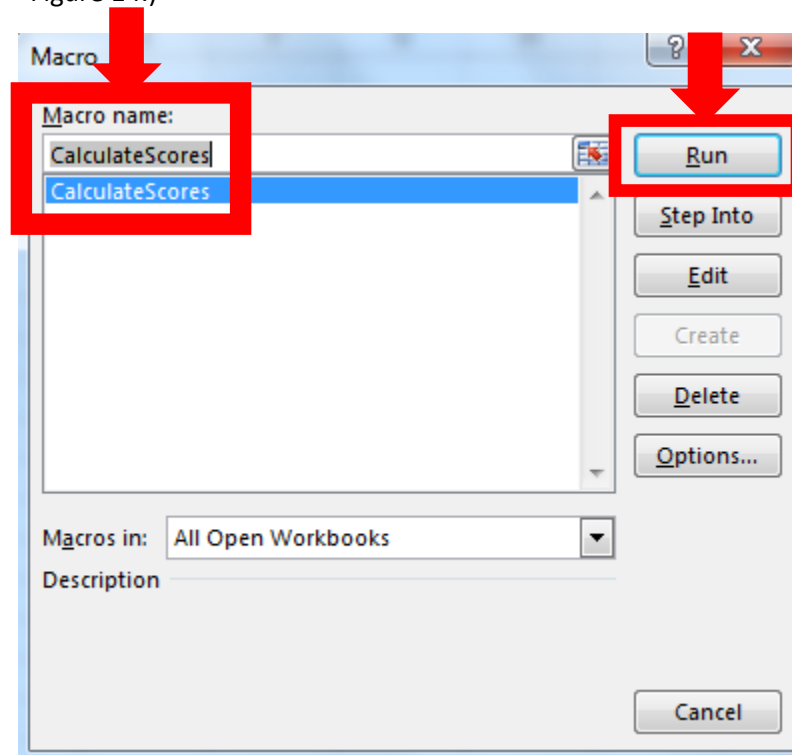


Figure 14 Macro table

- 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.)

Calculate Potential Donor Scores - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW DEVELOPER Get Started

Visual Basic Macros Use Relative References Record Macro Add-Ins COM Add-Ins Insert Design Mode View Code Source Expansion Packs Import Export Document Panel Modify

O2

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
	Last Name	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	Engagement w/ Organization Score	Total Score	
1																	
2	Scrooge	Ebenezer	Mr. Ebenezer Scrooge		140 Tighwad Way	Misery	PA	76755	(407) 555-5213	Mal@mail.com	3	3	3	0		9	
3	Plumtree	John	Jack & Sally Plumtree		123 Pass Rd	Almost Heaven	WV	70000	Unlisted	Mal@mail.com	3	3	1	0		7	
4	Salman	Harold	Mr. & Mrs. Harry Salman	Harry & Mary	1433 Dodge Ave	Williamsport	PA	17701-1276	(717) 555-4545	Mal@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	Mal@mail.com	1	3	1	1		6	
6	Borge	Victor	Mr. Victor Borge		147 Main	Look Haven	PA	77745	(555) 321-4567	ema@mail.com	3	2	1	0		6	
7	Breadstern	Sally	Ms. Sally Breadstern		1544 North 1st Street	Linden	PA	77702	(408) 221-4234	Mal@mail.com	0	3	3	0		6	
8	Michell	Mark	Mr. & Mrs. Mike Michell	Mike & Kelly	5 Garth Rd	Avis	PA	77721-1887	(717) 555-1983	Mal@mail.com	1	2	1	2		6	
9	Terk	Kenneth	Mr. & Mrs. Ken Terk	Ken & Maureen	7 Orchard Hill Rd	Jersey Shore	PA	17740-1772	(717) 555-1239	Mal@mail.com	2	2	1	1		6	
10	Bliner	Jim	Mr. & Mrs. Jim Bliner		202 Hogan Blvd APT1	Mill Hall	PA	77751	Unlisted	john@supercomputergeek.com	0	3	1	1		5	
11	Brady	Karl	Mrs. & Mr. Karl Brady		234 Coyote Ave	Avis	PA	77022-1442	(576) 123-4323	Kragg@arist.com	1	3	1	0		5	
12	Cheney	Daniel	Mr. & Mrs. Dave Cheney	Dave & Olga	346 Front Street	Jersey Shore	PA	17740-1766	(717) 555-9874	Mal@mail.com	0	3	1	1		5	
13	Clean	Franklin	The Clean Family		123 Cactus Rd	Jersey Shore	PA	17740-1277	(602) 555-1286	foleand@fbi.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	Gestapo	Andrew	Mr. & Mrs. Andrew Gestapo	Andrew & Laura	234 Pearl Street	Avis	PA	17725-1235	(313) 555-5234	andrew@servantpc.com	0	3	1	1		5	
16	Mutliler	Danison	Mr. & Mrs. Damon Mutliler	Damon & Lisa	885 Fourth Street	Avis	PA	17721-1245	(717) 555-9878	Mal@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	Orville	Orville & Stephanie Notenough	Orville & Stephanie	44 Oldtimers Way	Nevark	NJ	05555-1042	(215) 555-1232	onot@tutu.net	3	1	1	0		5	
19	Qsvald	Mike	Mr. & Mrs. Mike Qsvald	Mike & Sarah	200 Computer Lane	State College	PA	76777	(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) 386-1334	LovinServant@pc@aol.com	1	3	1	0		5	
21	Arnold	John	Mr. & Mrs. Jim Arnold	Jim	300 Front Street, Apt 1	Lock Haven	PA	77745	(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	Mal@mail.com	0	3	1	0		4	
23	Chipmunk	Alvin	Mr. Alvin Chipmunk		989 South St	St. Louis	MO	63123		Alvin@mail.com	0	3	1	0		4	
24	Church	First Baptist	Mr. First Baptist Church		570 Jacksonville Rd	Belleville	PA	76823	(814) 555-2369	ema@mail.com	0	3	1	0		4	
25	Cosmo	Vincent	Vincent Cosmo		5151 W 21st St	Columbus	OH	77787	(555) 717-4567	ema@mail.com	0	3	1	0		4	
26	Cruise	Tom	Mr. & Mrs. Tom Cruise	Tom & Michelle	155 Woods Rd	Avis	PA	77721	(901) 555-8305	tomc@techie.net	0	3	1	0		4	
27	Guttesnhauser	Dwight	Dr. Dwight Guttesnhauser		123 Main	Sunnydale	PA	72345	(555) 947-8346	ema@mail.com	0	3	1	0		4	
28	Hanson	Man	Mr. & Mrs. Matt Hanson	Man & Connie	1234 Ton Rd	Varenville	PA	77742	(555) 784-6548	Mal@mail.com	0	3	1	0		4	
29	Jackson	Edward	Ed & Patricia Jackson		1234 Main St	Phoenix	AZ	85021-1887	Unlisted	Mal@mail.com	0	3	1	0		4	
30	Knight	Michael	Michael Knight		80 S Television St	Holly Wood	CA	93939	(866) 555-4567	ema@mail.com	0	3	1	0		4	
31	Lynn	Fred	Fred and Marsha Lynn		20 South St	Albany	NY	72203	(555) 487-8394	ema@mail.com	0	3	1	0		4	
32	MacMillen	Tom	Mr. & Mrs. Tom MacMillen	Tom & Wendy	East St	Elizabethtown	NY	79872	(555) 849-7894	ema@mail.com	0	3	1	0		4	
33	Man	Tim	Tim and Martha Man	Tim and Martha	98 South St	Dallas	TX	75486	(555) 987-4564	ema@mail.com	0	3	1	0		4	
34	Morey	Thomas	Tom & Joyce Morey		233 Mountain Ave	Linden	NY	7742-3422	(412) 555-4545	Mal@mail.com	0	3	1	0		4	
35	Muñoz	Anthony	Anthony Muñoz		100 Bengals Dr	Cincinnati	OH	75838-1236	(555) 845-1234	ema@mail.com	0	3	1	0		4	
36	Ned	Needlehead	Mr. Needlehead Ned		9 Down St	Nazareth	PA	76829	(555) 845-7894	ema@mail.com	0	3	1	0		4	
37	Newsham	Donald	Donald & Darlene Newsham	Donald & Darlene	1234 Main Street, Apt 1	St. Louis	MO	75838-1236	(314) 555-2342	Mal@mail.com	0	3	1	0		4	

Donor List Donor History History Worksheet Yearly Worksheet Donor Worksheet Summary

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 |