RaiseTell

Using the High Lift Donors Dashboard

Who gave above their average this time last year - and who to ask, cultivate and steward this month

Dashboard 280 · QX269 + QX270

What makes a donor "high lift" for a month



Baseline

Giving in the same calendar month 1, 2 and 3 years earlier, divided by 3. Years with $0 count.

Lift ($) = target-month giving minus baseline.
Lift (x Avg) = target-month giving / baseline.

1. **More than 3x the baseline**
   giving in the target month
2. **At least $100 above the baseline**
   so small amounts don't qualify
3. **Gave in at least 1 of the 3 prior years**
   first-time donors are excluded
4. **More than 3x their median gift**
   over the prior 36 months
5. **Not deceased**

Four tabs: start on the Overview

Overview

Run month (read from the data), live counts for each list and section, the high-lift test and a key to the scores.

This Month

QX269. Appeals and early contact for donors whose big month was a year ago, plus thank-yous for this year's gifts.

Catch-Up (Last Month)

QX270. Last month's list relabelled to today, so nothing from last month is missed.

Summary

Donors, giving and lift by list, section, target month and action timing.

Action Timing tells you what to do with each row

Cultivate

Based on LAST year's big gift

- **Appeal month was last month - follow up now** *Catch-Up only*
- **Appeal this month** *Make the ask now*
- **Appeal next month - start contact now**
- **Appeal in 2 months - start contact now**
- **Appeal in 3 months - start contact now** *This Month only*

Steward

Based on THIS year's gifts

- **Thank / steward now (this month)**
- **Confirm thanked (last month)**
- **Confirm thanked (2 months ago) - Catch-Up only**

Stewardship rows appear only when the database has gifts from this month or last month.

Each month: steward, ask, contact, catch up

1



Steward first

On This Month, filter Action Timing to the Thank / Confirm thanked rows and make sure every one is acknowledged.

2



This month's asks

Filter to Appeal this month. Sort by Lift ($) high to low; work Top, then Middle (LFY Segment).

3



Start contact

The Appeal next month / in 2 / in 3 months rows: begin pre-ask contact now.

4



Catch up

On Catch-Up, filter to Appeal month was last month - follow up now. Pick up anything not acted on.

5



Hand off

Filter by Assigned Fundraiser to give each their rows. Large high-lift donors with no fundraiser are candidates for assignment.

Yellow dropdowns filter and sort both lists

Filter (choose (All) to clear)

Assigned fundraiser, target month, action timing, giving trend, LFY and CFY segment, mode month, giving pattern, years gave in the month, constituency, donor classification

Sort the list by

Lift ($) or Lift (x Avg), giving in the target month, action timing (follow-ups and this month's appeals first), net lifetime giving, last gift date - plus every filter field

Sort the list by

Lift ($) - high to low ▼

Filter: Action Timing

Appeal this month ▼

Row 4 shows "Showing X of Y rows" so you always know a filter is on.

Columns run left to right the way you work a row: who, when and why; what has happened since; how important; supporting detail; reference. Jan-Dec at the far right count the donor's lifetime gifts in each calendar month. **Switch Excel mode from Viewing to Editing** (top right corner of the Excel ribbon) - the dropdowns don't work in Viewing mode.

Avoid double contact and measure results

Watch-outs

- Catch-Up's this-month and upcoming rows usually repeat rows on This Month (same donor, same target month). The new work on Catch-Up is the follow-up row - don't approach a donor twice.
- No stewardship rows? The data may not include this month's or last month's gifts yet - refresh before working the list.
- Both lists roll with the run month on the Overview - check it first.

Measures of success

Gift rate
on cultivation rows - did the ask month bring a gift?

Prompt thanks
every stewardship row acknowledged

Retention
high-lift donors giving again year over year