RaiseTell

Using the Donors on the Upswing Dashboard

Whose giving is gaining momentum -more money, more gifts or shorter gaps - so you can prioritize upgrade asks and major gift qualification

Dashboard 273 · QX273

Three momentum signals, one list

Amount

Total giving in the last full fiscal year rose more than 5% vs the year before.

Increase Trend: 2-Year Increase(both ofthe last two years) or 1-Year Increase.

Gifts

More gifts in the last full fiscal year than the year before (exact counts).

Shows as a Gift Count Trend thatstartswith I (up).

Gaps

The median time between gifts over the last 36 months is at least 25% shorter than before.

Gifts only -pledge payments follow a schedule, not donor choice.

Any signal puts a donor on the list.

Momentum Signals
which apply, e.g. Amount + Gifts

Signal Count
1, 2 or 3 -more signals, stronger evidence

New (N) and reactivated (R) donors don't count as increasing. Deceased donors are excluded.

Reading the gift-timing columns

Interval Change (%)



= -33% Negative means the donor is giving more often. -25% or less (with enough gifts) is the Gaps signal.

FYTD Pace vs Last Year

Compares giving this fiscal year to date (Current Giving CFYTD) with the same point last year (Giving LFYTD): Ahead, On pace, Behind, or Behind (nothing yet this year).

Trend codes (most recent year first): I up · E equal · D down · L none that year · R back after a year with none · N first year. Giving Amt Trend uses dollars (within 5% = E); Gift Count Trend uses exact gift counts.

Three tabs: check the Overview, work the list



Overview

Live counts by signal and increase trend, how many show all three signals, the rules for who is listed, and a key to the codes.



Increasing Donors

The working list, one row per donor. Columns run: who and why (green), gift timing (navy), giving history (blue), reference (grey).



Summary

Donors by segment and number of signals, donors by each signal, and by 2-Year vs 1-Year Increase.

Start with the strongest momentum

1 

Top andMiddle, 2-3 signals

Filter Segment to Top, then Middle; sort by Signal count. Candidates for an upgrade conversation or major gift qualification.

2 

Mid-level pipeline

Filter Segment to Bottom and Momentum Signals to Amount. These are your mid-level prospects.

3 

Thank first

Recognize their growing support - before you make the next ask.

4 

Route the unassigned

Filter Assigned Fundraiser to (No fundraiser) and route strong-momentum donors to a fundraiser.

5 

Then ask

Upgrade asks and deeper engagement, timed after the thank-you.

Yellow dropdowns filter and sort the list

Filters

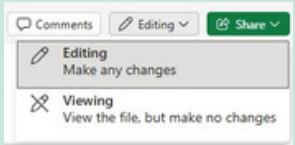
Segment, momentum signal, signal count, increase trend, FYTD pace, giving amount and gift count trends, segment change, constituency, fundraiser. (All) clears a filter.

Sorts

Signal count (most first), interval change (biggest speed-up first), giving last full FY, current giving this FY, lifetime net giving, last gift date -plus every filter field.

One signal at a time: the Momentum Signals filter picks a single signal -Gaps shows every donor with Gaps, alone or with others. Row 4 shows "Showing X of Y donors" so you know a filter is on.

Switch to Editing first. The dropdowns don't work in Viewing mode -change it at the top right of the Excel ribbon.



Check the momentum is real, then measure

Watch-outs

- Gaps-only donors are giving more often, but not always more money -check Giving Amt Trend before an upgrade ask.
- Momentum is measured on the last full fiscal year. Check FYTD Pace: many donors may not have given yet this year.
- The list changes with every refresh -review it regularly.

Measures of success

Upgrade rate
among the donors you approach

Portfolio moves
number moved into major or mid-level portfolios

Next-year growth
their giving the following year