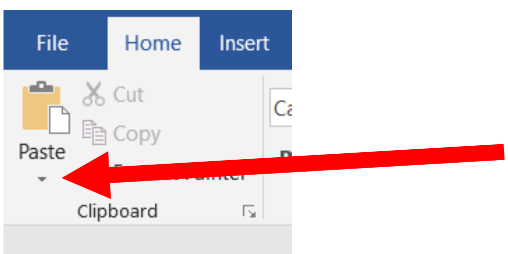
Instructions

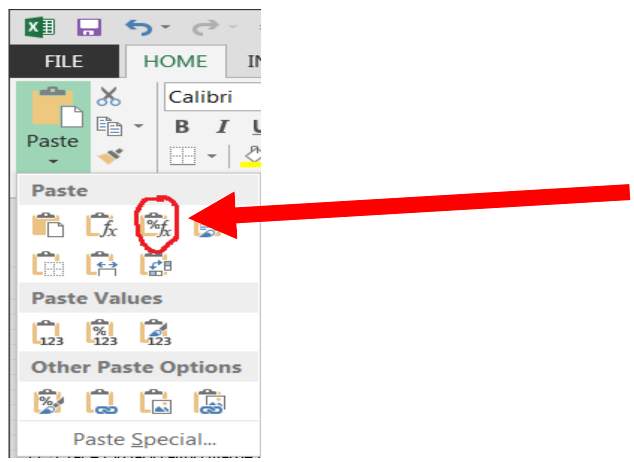
Organizational Report Template 2018

Revised October, 2018

<u>Important Note:</u> To preserve all formulas, please **Do Not Move, Add or Subtract columns or rows**. Lines should be added ONLY where instructed.

Anytime you want to move information, **copy and paste** information, use the paste function **"formula and numbers formatting"** found by using the drop-down arrow under the paste icon on your home ribbon:





Step 1: Begin the reporting process by saving this template as a new document

SAVE AS "Organization Name Y1Q1 Report (Quarter ending date)"
Example: **Temple Sinai Y1Q1 Report 3.30.19**

Step 2 – Fill in organizational information, typing over the grey words (highlighted red boxes below)

Cell B5 – Enter the name of your organization
Cells K8-K15 – Enter Address, City, State, Zip, Contact Name, Email & Phone
    Address 2 - apartment or suite numbers
    Contact Name, E-mail, Phone - person filling out this report

	A	B	C	D	E	F	G	H	I	J	K	L
1												
2												
3												
4												
5	**Organization Name:**	Place Organization Name Here										
6												
7	**Legacy Team Members**											
8	First Name	Last Name	Address 1	Address 2	City	State	Zip	Phone	Email	Street Address:	Type STREET Here	
9										Address 2:		
10										City:	Type CITY Here	
11										State:	Type STATE Here	
12										Zip	Type ZIP Here	
13										Contact Name:	Type NAME Here	
14										Contact E-mail:	Type EMAIL Here	
15										Contact Phone	Type Phone Here	
16												
17												
18												

Step 3 – List your Legacy Team Members (in the coral colored box shown above)

Columns A-I - enter the contact information of your Legacy Team Members, beginning on row 9.

Phone - type 10 numbers, the format is automatic

Step 4 – Enter your potential legacy donors, as you have conversations, on the tracking form

Please note there is a different colored section for each quarter. Quarter 1 is green

Columns A-I – **For Individuals**, enter contact information for each individual (Names, Address, City, State, Zip, Phone, and Email).

Enter all of the name into First Name; the ONLY thing in the Last Name column should be the name by which you are alphabetizing:

	A	B
19	**Prospect Tracking Form**	
20	First Name	Last Name
21	Dena Morris and Randy	Kaufman
22	Dena Morris	Kaufman
23	Dena and Randy	Kaufman
24	Dena Morris Kaufman & Randy	Kaufman
25	Dena	Morris Kaufman
26		

Columns J-R – see explanations below

J	K	L	M	N	O	P	Q	R
Conversation Date (MM/DD/YY)	Group Presentation Date (MM/DD/YY for first one only)	Contact By (Name or Initials)	LOI Rec'd (MM/DD/YY)	LOI Value (Estimated If Not Known)	Gifts Realized (Amount)	Formalized (MM/DD/YY)	Program Year	Quarter

Column J = Conversation Date: the date the personal conversation actually took place MM/DD/YY
Column K = Group Presentation Date: For first person input date using this format: MM/DD/YY. For all others, input date using this format: MM.DD.YY

Important Note for Group Conversation Column:
Dates formatted MM/DD/YY will work with the formulas and be counted.
Dates formatted MM.DD.YY will not get counted. This will allow for an accurate calculation of the number of group presentations made.

Column L = Contact By: initials or name of person who had the conversation or made the presentation. If the gift was made from a conversation at a different organization, put that organization name as the Contact.
Column M = LOI Rec'd: enter the date the legacy commitment form was received MM/DD/YY
Column N = LOI Value: If the donor shares the value of their commitment, enter it here.

If the value is unknown, or is a percentage, check with your Federation/Foundation to see what dollar amount they want you to use as a place holder.

Column O = Gifts Realized: If the donor makes the gift now, versus upon their passing, enter the amount here.
Column P = Gifts Formalized: enter a date here when you have paperwork formalizing the gift (Legacy Confirmation of Gift Form, change of beneficiary form, copy of portion of will, letter from attorney…) or when the donor says that they have completed the legal paperwork.
Columns Q-R = Program Year and Quarter: These are pre-filled.

If you have **more than 30 Prospects** in any quarter, you will need to add rows.
To insert rows, right click on row 49 and choose "insert" as many times as you need.

Please refer to "Attachment A" at the end of this document for examples of specific situations

Step 5 – Enter your Marketing and Stewardship Efforts (The Grey boxes on the far right)

T	V	W	X	Y	AA
Media and Outreach: Attach actual samples	**Month 1**	**Month 2**	**Month 3**	**TOTAL**	**Highlights:** Share a few highlights from Life & Legacy during the reporting period.
Ads	0	1	0	1	Poster in Lobby
Newsletters	0	0	0	0	
E-Newsletters	1	1	1	3	
Press Releases	1	0	0	1	
Radio Spots	0	0	0	0	
Other	0	0	3	3	Facebook posts, statement stuffer
Stewardship:					
Communication with Legacy Donors	4	3	3	10	
Listing of Legacy Donors	0	0	1	1	
Legacy Events	0	0	0	0	
Other	0	0	10	10	Passover card

Columns V, W, X = type in the number of times you undertook each activity during the quarter, by the month. You are invited to attach any samples that you would like to share.

If your activity does not fit neatly in these categories, count the activity as "other" and enter the explanation in the "**Highlights**" section column **AA**

Column Y = This Total column will populate automatically

Column AA = Use this section to highlight any conversations or activities that took place during the quarter and to explain any activities that don't fall neatly into the categories in column **T**

Notes for Media and Outreach (Marketing and Stewardship)

- **Ads =** any poster, banner, periodical ad, flyer – **counted as '1'**
- **"Other"** in Media/Marketing would include anything that doesn't obviously fit into the other categories. For example: using the tagline, Facebook post, direct mail, presentation to board, LOI on seats at an event, etc. Each **count as '1'**
- **Communication with Legacy Donors** = any formal communication with a donor (thank you note, phone call, personal meeting, personal note on a form letter or card) – **each piece is counted** so we expect to see at least the number of new gifts you have.
- **Listing of Legacy Donors =** count each time you list your donors as **'1'**. If you list on your website or on a poster or banner, just count the first time you do this.
- **"Other"** in Stewardship is anything that doesn't obviously fit into the category. For example: gifts, Facebook post, form letter, card, or email (any communication without a personal note). Each type **counts as '1'.**

Step 6 – Double Check your work

At the bottom of each quarter is a line of Totals (For Quarter 1 – line 51). Please check these to be sure they are correct, as well as the yearly totals at the end of Quarter 4.

Column Y = Please check column Y to be sure that these totals are correct for each quarter.

Step 7 – Send your completed Quarterly report to your community staff person

Make sure to **save the file each time you update the data**. At the end of the quarter, email your report to the community staff person.

Step 8: Begin your next quarter by saving this report as a new document

SAVE AS "Organization Name Y1Q2 Report (Quarter ending date)"
Example: **Temple Sinai Y1Q2 Report 6.30.19**

Repeat this process for each quarter.

P.S. If you want to use more descriptive information or make notes, you can use **column S** and you won't upset any of the formulas. For example, "5% of estate", "donor said NO"

See Attachment A below for some specific situations.

Attachment “A” – Specific situations

#1 Anonymous Donors – Each donor must fill out a legacy commitment form to participate in the program, so they are not completely anonymous. However, if they do not wish to appear on any public recognition lists, or you receive word from another organization that you have received an anonymous gift, add the word “anonymous” to their name and put their name, if you know it, in red.

Prospect Tracking Form

First Name	Last Name	Address 1	Address 2	City	State	Zip	Phone	Email
Abram	Lee ANONYMOUS	720 Walnut St.	#3A	San Francisco	CA	94590	(650) 125-8745	a@cox.net

#2 Assign Only – you have assigned a prospect to a team member but they have not yet met. Enter the team member initials or name in column L, Contact By.

Prospect Tracking Form

First Name	Last Name	Address 1	Address 2	City	State	Zip	Phone	Email	Conversation Date (MM/DD/YY)	Group Presentation Date (MM/DD/YY for first one only)	Contact By (Name or Initials)
Abram	Lee	720 Walnut St.	#3A	San Francisco	CA	94590	(650) 125-8745	a@cox.net			RA

#3 Conversation, but no commitment – a team member met with a prospect but has yet to secure a legacy commitment. Enter only the Conversation Date in column J and the Contact By information in column L.

Prospect Tracking Form

First Name	Last Name	Address 1	Address 2	City	State	Zip	Phone	Email	Conversation Date (MM/DD/YY)	Group Presentation Date (MM/DD/YY for first one only)	Contact By (Name or Initials)	LOI Rec'd (MM/DD/YY)
Abram	Lee	720 Walnut St.	#3A	San Francisco	CA	94590	(650) 125-8745	a@cox.net	01/25/15		RA	

#4 Amount is a percentage, or is NOT known – a team member has met with a prospect and secured a signed commitment, but the donor does not share the value of the gift. Enter the LOI Rec’d Date in column M and for LOI Value in column N, check with your community staff person for the placeholder amount.

#5 A donor pledges to make a cash gift which will be paid over a number of years - enter the total gift in the LOI Value column N, and the cash received to date in the Gift realized column O. As additional payments are made, the gifts realized figure can be updated.

Prospect Tracking Form

First Name	Last Name	Address 1	Address 2	City	State	Zip	Phone	Email	Conversation Date (MM/DD/YY)	Group Presentation Date (MM/DD/YY for first one only)	Contact By (Name or Initials)	LOI Rec'd (MM/DD/YY)	LOI Value (Estimated If Not Known)	Gifts Realized (Amount)	Formalized (MM/DD/YY)
Abram	Lee	720 Walnut St.	#3A	San Francisco	CA	94590	(650) 125-8745	a@cox.net	01/12/15		RA	01/12/15	$15,000	$5,000.00	1/12/2015

#6 You have a conversation with a donor in one quarter but receive the legacy commitment in a different quarter (or the formalization in a different quarter of year 1 or 2)–

Add the new information into the original entry OR leave the first entry alone and make a new entry for the donor in the quarter when the commitment is received with complete information. **Do not duplicate the gift information, only the donor contact information**. If you do this, use the paste function "formula and numbers formatting" or "values" to paste ONLY the cells with the donor information (not the entire line). DO NOT DELETE A LINE.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
19	**Prospect Tracking Form**													
20	First Name	Last Name	Address 1	Address 2	City	State	Zip	Phone	Email	Conversation Date (MM/DD/YY)	Group Presentation Date (MM/DD/YY for first one only)	Contact By (Name or Initials)	LOI Rec'd (MM/DD/YY)	LOI Value (Estimated If Not Known)
21	Abram	Lee	720 Walnut St.	#3A	San Francisco	CA	94590	(650) 125-8745	a@cox.net	01/12/15		RA		

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
52	First Name	Last Name	Address 1	Address 2	City	State	Zip	Phone	Email	Conversation Date (MM/DD/YY)	Group Presentation Date (MM/DD/YY for first one only)	Contact By (Name or Initials)	LOI Rec'd (MM/DD/YY)	LOI Value (Estimated If Not Known)
53	Abram	Lee	720 Walnut St.	#3A	San Francisco	CA	94590	(650) 125-8745	a@cox.net	01/12/15		RA	04/15/15	$25,000

#7 Group Presentation Gifts – For example,

the Rabbi makes a group presentation to the board – (Line 21 below). Enter only "Board of Directors" in column B, Last Name and "Rabbi" in Contact By, column L.

One legacy commitment is secured that night (Line 22 below). Enter names, address, city, state, zip, phone, email, and Contact By. Enter column K, Presentation Date as MM.DD.YY so that you know the date but it doesn't tabulate as a separate presentation.

At a time in the future, someone has a follow-up conversation which closes a gift (Line 23 below). Enter names, address, city, state, zip, phone, email, and Contact By. Enter Conversation Date, column J, as MM/DD/YY for the conversation date that closed the gift. Also enter Presentation Date, column K, MM.DD.YY (so that you know they were part of the group presentation but it doesn't tabulate as a separate presentation).

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
19	**Prospect Tracking Form**													
20	First Name	Last Name	Address 1	Address 2	City	State	Zip	Phone	Email	Conversation Date (MM/DD/YY)	Group Presentation Date (MM/DD/YY for first one only)	Contact By (Name or Initials)	LOI Rec'd (MM/DD/YY)	LOI Value (Estimated If Not Known)
21		Board of Directors									01/25/15	Rabbi		
22	Marty	Smith	5 Main St.		SF	CA	94582	(650) 125-4879	marty@gmail.com		1.25.15	Rabbi	01/25/15	$25,000
23	Jack	Kaye	3 Bamboo St.		SF	CA	94563	(415) 236-9857	jack@cox.net	02/08/15	1.25.15	AL	02/08/15	$25,000

#8 Newly Discovered Gifts – In your conversation with a prospect, the person reveals that they have already provided for the organization in their estate. Ask them to sign a Legacy Commitment form so that you have their permission to publish and so that you can ask them if they would like to include any other organizations in their plan. Enter the date that the Legacy Commitment form is signed in column P, Formalized.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
19	**Prospect Tracking Form**															
20	First Name	Last Name	Address 1	Address 2	City	State	Zip	Phone	Email	Conversation Date (MM/DD/YY)	Group Presentation Date (MM/DD/YY for first one only)	Contact By (Name or Initials)	LOI Rec'd (MM/DD/YY)	LOI Value (Estimated If Not Known)	Gifts Realized (Amount)	Formalized (MM/DD/YY)
21	Rabbi Sam	Goodman	6587 Spruce St.		San Francisco	CA	94589	(415) 845-6932	rabbi@ts.org	01/12/15		RA	01/12/15	$10,000		3/15/2011

#9 Cash gift – Your prospect wants to put cash in an endowment now, rather than making arrangements for the gift to come to you after their passing. Enter the amount in the LOI Value column N, AND in column O Gifts Realized. Also enter the date of the gift into column P, Formalized.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
19	**Prospect Tracking Form**															
20	First Name	Last Name	Address 1	Address 2	City	State	Zip	Phone	Email	Conversation Date (MM/DD/YY)	Group Presentation Date (MM/DD/YY for first one only)	Contact By (Name or Initials)	LOI Rec'd (MM/DD/YY)	LOI Value (Estimated If Not Known)	Gifts Realized (Amount)	Formalized (MM/DD/YY)
21	Abram	Lee	720 Walnut St.	#3A	San Francisco	CA	94590	(650) 125-8745	a@cox.net	01/12/15		RA	01/12/15	$5,000	$5,000.00	3/15/2011

#10 Another organization secured a gift for your organization – enter the gift with the Contact By showing the other organization name.

If you have any questions, please contact your Federation or Foundation Legacy staff.