



# The Human Fund

## Donor Clinic

May 2026

**We take your donor data and turn it into a plan to raise thousands.**

# \$1,612,307

— your plan to raise

We took your 35,457 donor records and turned them into a clear plan to act on — not just cleaner data, but exactly what to do next to raise more.

### YOU ALSO GET

- Your full donor list, cleaned & deduplicated (CSV)
- Ready-to-send mail-merge templates
- Step-by-step merge steps for your CRM
- Action lists for every play (spreadsheet)
- Your original upload, preserved untouched
- A one-page Read Me First

## At a glance

#	Play	Donors	\$ at stake	Action
1	We standardized your bad addresses	33354 addresses fixed	\$877,413	Use corrected mailing file
2	We found donors you can no longer reach by email	2315 donors	\$221,255	Mail postcard to recover emails
3	Donors reachable only by direct mail	1275 donors	\$177,584	Send stewardship piece this quarter
4	Duplicate households giving twice the appeal mail	1419 pairs	\$35,475	Merge in CRM today
5	Donors who serve on nonprofit boards	21 board connections	—	Send intro email
6	Concentration risk in your top 5 donors	top 5 = 25%	\$23,700	Thank-you call this week
7	Last-year donors you haven't renewed yet	246 donors / \$1,107,518	\$276,879	Work top-down

Your cleaned data is in `cleaned-data/` if you want to update your CRM.

# PLAY 1 — We standardized your bad addresses

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We standardized 33354 of your donor addresses. They represent \$16,547,649 in lifetime giving. If you'd mailed your next appeal to the old list, the formatting errors and unparseable rows would have generated returned mail.

## WHAT WE DID

- Parsed every donor address against USPS-deliverable formatting rules
- Standardized casing, abbreviations, and zip+4 where the source was usable
- Flagged unparseable rows for review

## WHAT TO DO THIS WEEK

1. Use the corrected mailing file for your next appeal
2. Update the corrected addresses in your CRM

## WHO TO REACH FIRST

Donor Name	Change Type	Lifetime Giving
Jesse Barnes	standardized	\$1,168,737
Charles Evans	standardized	\$586,276
Brandon Walker	standardized	\$470,318
Richard Madden	standardized	\$213,356
Tammy Cooper	standardized	\$203,000

Full list: [action-lists.xlsx](#) → *Play 1 — Address rescue*

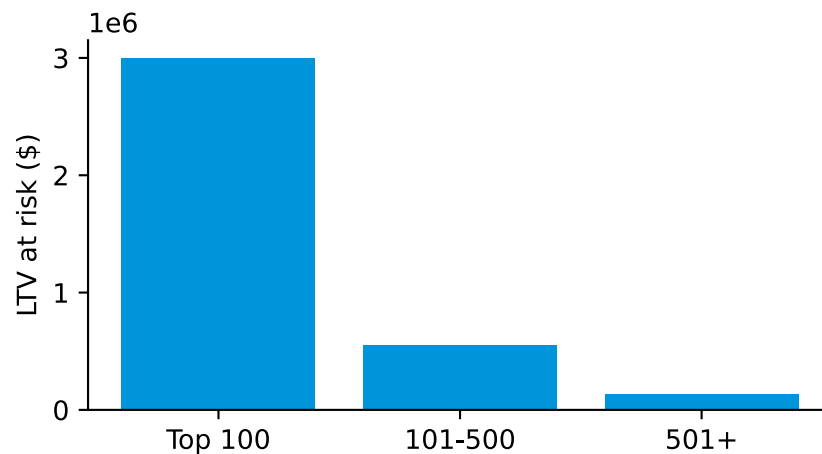
**EXPECTED IMPACT** — \$877,413 — 33354 addresses rescued representing \$16,547,649 lifetime giving.

*Assumes 5% retention floor on rescued donors + \$1.50 saved per non-RTS piece. Actual results vary; most clients see better.*

# PLAY 2 — We found donors you can no longer reach by email

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We found 2315 donors with no email on file. They've given you \$3,687,584 lifetime. If your next push is email-only, you can't reach them.



## WHAT WE DID

- Checked every donor record for missing or invalid email addresses
- Cross-checked against your transaction history to flag active givers
- Filtered to donors with valid mailing addresses (mail-recoverable)

## WHAT TO DO THIS WEEK

1. Print the mail-merge list from action-lists.xlsx Play 2 tab
2. Use the postcard template in templates/email-harvest-postcard.docx
3. Mail by Friday — postage-paid response card harvests current emails

## WHO TO REACH FIRST

Donor Name	Lifetime Giving
Alexander Harris	\$595,000
Karen Peterson	\$162,500
Heather Pittman	\$160,000
Amanda Cole	\$150,000
James Jimenez	\$113,000

Full list: [action-lists.xlsx](#) → *Play 2 — Email harvest*

Template: [templates/email-harvest-postcard.docx](#)

**EXPECTED IMPACT** — \$221,255 — 2315 donors with no email represent \$3,687,584 lifetime giving.

*Assumes 30% postcard response rate; recovery spread across donor lifespan. Actual results vary; most clients see better.*

# PLAY 3 — Donors reachable only by direct mail

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We found 1275 donors with no email AND no phone. They've given you \$1,775,844 lifetime. Direct mail is your only channel — send a stewardship piece this quarter or you'll lose them quietly.

## WHAT WE DID

- Identified donors missing both email and phone contacts
- Cross-checked mailing addresses for deliverability
- Sorted by lifetime giving to prioritize stewardship

## WHAT TO DO THIS WEEK

1. Print the stewardship template from templates/direct-mail-stewardship-piece.docx
2. Mail-merge the names from Play 3 tab in action-lists.xlsx
3. Send by end of this quarter as a stewardship-only piece (no ask)

## WHO TO REACH FIRST

Donor Name	Mailing Address	Lifetime Giving
Karen Peterson	928 Ingram Ville, Amandabury, RI, 64832	\$162,500
Heather Pittman	938 Jacobson Terrace, Ramirezmouth, DC, 98617	\$160,000
James Jimenez	1970 Gregory Corner, New Abigail, NV, 27209	\$113,000
Aaron Baxter	8284 Kenneth Junctions Suite 081, Perryberg, FL, 10152	\$65,000
Rodney Wilkins	8041 Richard Place, Karenchester, GU, 56013	\$40,000

Full list: action-lists.xlsx → *Play 3 — Direct-mail-only*

Template: templates/direct-mail-stewardship-piece.docx

**EXPECTED IMPACT** — \$177,584 — 1275 donors reachable only by direct mail represent \$1,775,844 lifetime giving.

*Assumes 10% retention floor when stewardship outreach is delivered. Actual results vary; most clients see better.*

# PLAY 4 — Duplicate households giving twice the appeal mail

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We found 1419 duplicate household pairs. They've given you \$5,174,502 combined. They're getting double the appeals (annoying them) and you're double-counting their LTV.

## WHAT WE DID

- Fuzzy-matched donor records on name + address + email
- Surfaced pairs with high overlap probability
- Ranked which record to keep by lifetime giving

## WHAT TO DO THIS WEEK

1. Merge each pair in your CRM today using the procedure PDF in this folder
2. Work the list top-down — highest combined LTD first
3. Update the merged record to carry the most recent address

## WHO TO REACH FIRST

Keep	Merge into Keep	Combined LTD
Jesse Barnes (id e405d406-bd1c-4f38-9a9b-04949920bf62)	Jamie Barnes (id fca66b99-c55e-4303-9692-b742c0c0532e)	\$1,178,487
Jesse Barnes (id e405d406-bd1c-4f38-9a9b-04949920bf62)	Adam Barnes (id 63fce333-d48a-40b2-bdc0-fc1ecf39563b)	\$1,168,787
Charles Evans (id f0a128dd-31a7-4944-870c-5eaa6b9344f6)	Karen Evans (id fdcfb50c-8971-433d-8fad-d0ab992d28a3)	\$598,968
Charles Evans (id f0a128dd-31a7-4944-870c-5eaa6b9344f6)	Jason Evans (id 324f77b3-d577-4a22-99a0-28493b78698b)	\$586,487

Keep	Merge into Keep	Combined LTD
Allison Daniels (id f26a9304-19ed-4b2d-9664-c3893267db7a)	Duane Daniels (id a7568e6b-b719-4585-9c99-7166accbad47)	\$146,066

Full list: [action-lists.xlsx](#) → *Play 4 — Household merge*

Procedure: [procedures/household-merge-generic.pdf](#)

**EXPECTED IMPACT** — \$35,475 — 1419 duplicate household pairs receiving double appeals. Assumes \$25/year per duplicate in saved mailing costs (4 mailings × \$6.25). Actual results vary; most clients see better.

# PLAY 5 — Donors who serve on nonprofit boards

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We cross-matched your donor list against 990 board service. 21 of your donors serve on the board of a major nonprofit. They aren't just individual donors — they're your institutional connection to a foundation, hospital, university, or other grantmaker.

## WHAT WE DID

- Cross-referenced your donor list against IRS Form 990 board listings
- Identified nonprofits where your donor serves as trustee, director, or officer
- Ranked by foundation size — largest cultivation opportunities first

## WHAT TO DO THIS WEEK

1. Send each donor a personal intro email using [templates/foundation-officer-intro-email.docx](#)
2. Schedule a 20-minute coffee or call to learn the nonprofit's priorities
3. Add the highest-asset matches to your grant prospect pipeline

## WHO TO REACH FIRST

Donor Name	Phone	Nonprofit	Role	EIN
Benjamin Petersen	585-693-9632	Stark Industries Foundation	CHAIR	88-8901234
Brenda Jimenez	691-452-9650	Stark Industries Foundation	BOARD MEMBER	88-8901234
Sydney Kennedy	303-648-1730	Stark Industries Foundation	DIRECTOR	88-8901234
Zachary Snyder		Vandelay Foundation	VICE CHAIR	11-1234567
Brittany Hubbard		Vandelay Foundation	TREASURER	11-1234567

Full list: action-lists.xlsx → *Play 5 — Board service*

Template: templates/foundation-officer-intro-email.docx

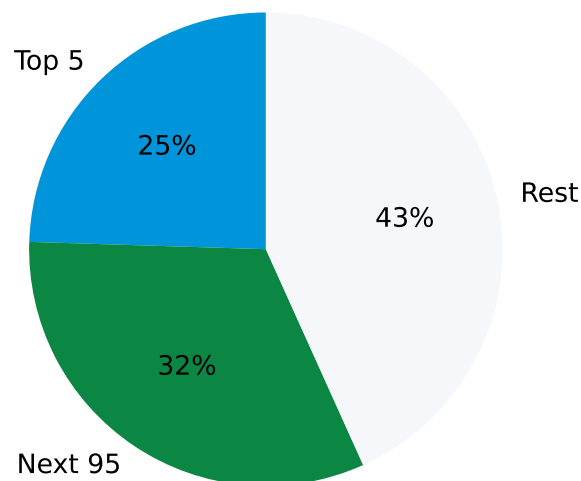
**EXPECTED IMPACT** — 21 board connections opened — institutional pipeline.

*Reported separately as institutional connections, not in dollar terms.*

## PLAY 6 — Concentration risk in your top 5 donors

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We calculated your top-of-pyramid concentration. Your top 5 donors gave \$474,001 — 25% of your last-year revenue. Concentration risk. Call them this week to thank, not ask. Skip this and they'll feel taken for granted.



### WHAT WE DID

- Summed last-12-month giving by donor
- Identified the top 5 by recent giving
- Calculated their share of total annual revenue

### WHAT TO DO THIS WEEK

1. Call all 5 this week using the script in templates/top5-thank-you-script.docx
2. Send a follow-up handwritten thank-you card after each call
3. Add a calendar reminder for a quarterly stewardship touch

## WHO TO REACH FIRST

Donor Name	Phone	Last 12 Months Giving
Jesse Barnes	987-718-1410	\$254,001
Stanley Alexander	923-891-6782	\$75,000
James Jimenez		\$50,000
Charles Evans	976-644-0538	\$50,000
Gabriela Davis		\$45,000

Full list: [action-lists.xlsx](#) → *Play 6 — Top-of-pyramid*

Template: [templates/top5-thank-you-script.docx](#)

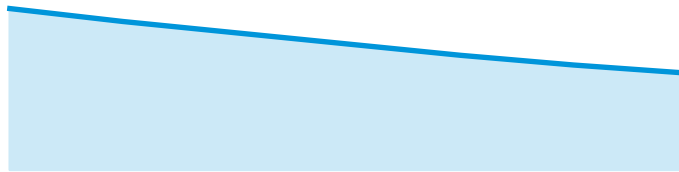
**EXPECTED IMPACT** — \$23,700 — Top 5 donors = 25% of revenue (\$474,001).

*Assumes 5% retention lift from a stewardship thank-you call. Actual results vary; most clients see better.*

# PLAY 7 — Last-year donors you haven't renewed yet

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We identified 246 donors who gave you \$1,107,518 last year and haven't renewed. That's \$1,107,518 in play this month at last-gift renewal levels. Industry retention drops sharply after the first lapsed year — call this week.



## WHAT WE DID

- Found donors with  $\geq$ \$1,000 in 2025 giving and zero 2026 gifts
- Pulled their phone numbers and last-gift details
- Suggested asks at last-gift renewal level (conservative — no upgrade)

## WHAT TO DO THIS WEEK

1. Call top-down using the script in templates/lybunt-renewal-script.docx
2. Use the call sheet in action-lists.xlsx Play 7 tab
3. Update each call outcome (yes/maybe/no/voicemail) for the next clinic

## WHO TO REACH FIRST

Donor Name	Phone	Last Gift Amount	Last Gift Date	Suggested Ask
Jesse Barnes	987-718-1410	\$254,001	2025-06-24	\$254,001
Daniel Greene	676-072-2251	\$50,000	2025-05-21	\$50,000

Donor Name	Phone	Last Gift Amount	Last Gift Date	Suggested Ask
Gabriela Davis		\$45,000	2025-10-29	\$45,000
Brian Bolton	019-229-6153	\$30,000	2025-12-12	\$30,000
Aaron Baxter		\$25,000	2025-12-22	\$25,000

Full list: [action-lists.xlsx](#) → *Play 7 — LYBUNT*

Template: [templates/lybunt-renewal-script.docx](#)

**EXPECTED IMPACT** — \$276,879 — 246 LYBUNT donors with \$1,107,518 in suggested asks. *Assumes 25% renewal rate (industry average is 40-60%). Actual results vary; most clients see better.*

## What to do first

### This week

- **Monday** — Plays 1 + 4 (use corrected file; merge duplicates)
- **Tuesday** — Print and mail Play 2 postcards
- **Wednesday** — Make Play 6 thank-you calls (top 5 donors)
- **Thursday** — Begin Play 7 LYBUNT calls (top-down)
- **Friday** — Send Play 5 foundation intro emails

### This quarter

- Send Play 3 stewardship piece to direct-mail-only donors.