EMPOWERED FUNDRAISER

CAMPAIGN COUNSEL FOR THIRD SPACES

FUNDRAISING LIBRARY · WORKSHEET + AI PROMPT

20 Minute Impact Report Template

Anne Murphy · Empowered Fundraiser Consulting

Use what you can verify to prepare an individual donor update. Gather the facts, describe what happened, and decide what you still need to confirm.

01 · Gather | 02 · Show the impact | 03 · Draft | 04 · Check

Use initials and information your organization permits you to share with an AI assistant. The worksheet does not send your entries to the Report Maker. Review what you copy before pasting it.

01 Gather the facts

Start with the donor's giving history and the question this report needs to answer.

Organization and mission

Use the organization's name and its approved mission language.

Donor initials and purpose

Use initials. Note who will receive the report and the conversation or question it should support.

Reporting period

Give the start and end dates. Say whether this is a fiscal year, calendar year, or another period.

Giving history and restrictions

List verified dates, amounts, funds and restrictions. Separate received gifts from unpaid pledges. Include a source for the figures.

02 Show the impact

A completed activity, a measured result, and a future goal are different things. Keep that distinction visible.

What happened

Describe the work completed during this reporting period. Name the program or fund where relevant.

What changed, and how do you know?

Record verified results and the source for each. Separate a measured outcome from an activity or a future goal.

Story, quotation or photograph

Add only material you have permission to use. Include attribution and source, or leave this blank.

03 Prepare the draft

Name the gaps before drafting, then set the next step for the conversation.

What is still unknown?

List missing results, figures, permissions or context. Decide who will confirm each item.

Next conversation and sign-off

Record the next reporting date or question, and the approved signer's name, title and contact information.

04 Check before sharing

- [ ] The donor's initials, reporting period, gifts, funds and restrictions are correct.
- [ ] Received gifts and unpaid pledges are shown separately.
- [ ] Every result and quotation has a source; permissions are confirmed.
- [ ] The report does not attribute an unsupported result to a particular gift.
- [ ] Every [TO CONFIRM] placeholder is resolved or clearly identified for the conversation.
- [ ] The sign-off and next step are approved.

For a broader conversation about the donor's priorities, use Giving Compass.

Copy the report prompt

Complete the worksheet, then copy the prompt with your notes into your AI assistant. You can also use the prompt on its own and answer its questions there.

Help me draft an individual donor impact report using the worksheet below and Anne Murphy's 20 Minute Impact Report structure.

First check the information. Ask up to three essential questions if an answer is needed to avoid a misleading report. If we can proceed with a gap, label it [TO CONFIRM] and carry it into a short review list. Use only supplied or explicitly identified sources. Do not invent outcomes, quotations, photographs, program costs, donor history, permissions, or a connection between a specific gift and a specific result.

Use donor initials. Keep gifts received separate from unpaid pledges. Preserve restrictions and fund names. State the actual reporting period; do not assume that a year means a calendar year. Check totals. Calculate a percentage change only when the periods are comparable and the earlier amount is greater than zero; otherwise explain what is missing.

Prepare these sections:
1. Cover: donor initials, organization, report date and reporting period.
2. Thank You: a brief, personal opening grounded in the donor's verified support and the organization's approved mission language.
3. Giving Overview: a clear summary of received gifts, funds and restrictions. Show pledges separately if provided. Omit endowment figures unless they are supplied and verified.
4. Your Philanthropic Impact: explain the verified work and results. Distinguish activities, outcomes and future goals. For unrestricted giving, describe the donor's support for the organization without claiming that their dollars alone produced a particular result. Include a supplied story or quotation only when permission is confirmed.
5. Reflections for Creating Effective Philanthropy Together: use questions relevant to this donor and the purpose of the conversation. Ask what they would like to know and whether they want to participate beyond giving. Do not add a new financial ask unless I request one.
6. Next Conversation: identify the next agreed step or reporting date, followed by the approved sign-off.

Write in the organization's supplied voice. Use specific, verifiable language and clear paragraphs. Replace broad claims about impact with the actual result or an explicit placeholder. Keep the report short enough for a stewardship conversation; do not pad missing evidence with promotional language.

After the report, give me a review list of unresolved facts, permissions and calculations. Do not send or publish anything.

WORKSHEET INFORMATION

Your report template

Use this structure when drafting by hand or reviewing an AI draft. Bracketed text marks information to supply.

Cover page

Your ORG NAME Philanthropy Overview

example: Your Friends of the Arts Philanthropy Overview

Prepared For: Donor Names

Month Year

CONFIDENTIAL

Your logo here

Thank You

Salutation,

[Org Name] and the [board, exec Dir, etc] are grateful for your generous philanthropy.

Your giving makes a difference in the lives of [who we serve]. [Succinct] tangible benefit to society.

You are bringing a [service, benefit] to [constituents] so they can [achieve whatever goal], and our entire [community/world] will benefit as a result. Your philanthropy advances [whatever] that makes life better. Your partnership allows us to provide programs that [specific benefit for the communities you serve].

Thank you.

I hope this report brings you a sense of pride in the incredible work we are accomplishing together. I've included:

A list of your primary gift designations.

An overview of [Name] Family philanthropy at [Org].

Highlights of your philanthropic and volunteer impact at [Org].

Reflections for creating effective philanthropy together.

I look forward to reviewing this information with you [in person/Zoom/on date]

Thank you for the opportunity to share in advance of our visit.

Sincerely,

Name

Title

Contact Info

[Name] Family [Org] Giving Designation

Unrestricted Funds

A

B

C

Program Funds

A

B

C

Named Funds

A

B

C

Facilities, etc etc

A

B

C

[name] Family Giving Overview

Total gifts and pledges to [Org]: $xxxxx

Over [??] years of giving

Multi-year pledges or outright gifts? Both

Endowment vs current use: Both

Legacy Society: [YES OR UNKNOWN]

Your Philanthropic Impact

UNRESTRICTED GIFTS allow [ORG] to nimbly advance existing priorities, address sudden emergencies, and seize rare opportunities as they arise. You have supported multiple unrestricted funds across [ORG]-thank you.

We are grateful for the trust you place in us to allocate your unrestricted gifts strategically. This type of support is worth its weight in gold. Thank you.

Your gifts to the [SPECIFIC FUND] advance [specific mission goal] through [points from mission]. [Expand on impact for constituents, society] [Cite specific example here....storytelling vibe]

HIGHLIGHT THEIR BIGGEST GIFT HERE

Established in [YEAR], provides [BENEFIT] for [constituents]

Financial info: The balance on the endowment as of [Month, DATE] was $XX, XXX

Total expenditures at that time were $X, XXX, XXX

Your gifts to the [SPECIFIC FUND] advance [specific mission goal] through [points from mission]. [Expand on impact for constituents, society] [Cite specific example here....storytelling vibe]

Reflections for Creating Effective Philanthropy Together

Philanthropy is joyous-and it is also complex. Decisions about which causes and nonprofits to support, how much money to invest in each organization you care about, and what constitutes a successful partnership will come up throughout your philanthropic journey.

As you consider opportunities to make a difference through your philanthropy, it can be helpful to reflect on your expectations, tolerance for risk, and where each initiative fits in your philanthropic portfolio. This will enable you to identify a commitment level—both financial and otherwise—that is commensurate with the opportunity or challenge you would like to address through your giving.

As you encounter new giving opportunities, it can be helpful to reflect on a few key questions.

Why do you give? Understanding why you give will help define how you want to give, to whom, and how engaged you'd like to be.

How do you want to engage with the organizations you support? This may vary from one cause to the next or from one gift to the next.

Are there non-financial resources you can use in service of your philanthropy? Your time, expertise, and unique personal networks can be extremely valuable in the right circumstances.

What constitutes a meaningful giving experience for you? Be clear with yourself and others about what makes you feel good about your decision to give.

Knowing what you want to accomplish with your philanthropy is key to decision making as you work with [ORG] and other nonprofit organizations. It's a joy to work with people like you who have put so much thought into building your legacy at [ORG].

Thank you again.

Thank you for entrusting [ORG] as you build your legacy of making a positive difference in the world. We are grateful for your partnership over the past [X] years and look forward to what we will accomplish together in the future!

CAMPAIGN LAUNCH LAB

You run the campaign. We help you build the plan

Work on your organization's campaign plan through a guided cohort. Review the complete plan with Anne in a private capstone and finalize your implementation roadmap. Your team implements the plan.

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About the Builder

Anne Murphy

CEO and Lead Fundraiser and Campaign Counsel

Anne Murphy is CEO of Empowered Fundraiser Consulting, with 35 years leading advancement strategy across higher education and the social impact sector, fundraising for over $10 billion in successful campaigns.

As Lead Fundraiser and Campaign Counsel, Anne guides organizations from feasibility study through campaign celebration, preparing and conducting donor conversations alongside leadership or independently.

Anne is a fundraising educator and professional keynote speaker whose talks cover campaigns, ethics in fundraising, and Responsible AI for Fundraising, Advocacy, and Democracy. She is co-author of the Framework for Responsible AI in Fundraising and co-host of The Daily AI Show.

She lives in Corvallis, Oregon with her family and three doggos.

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