**ATTACHMENT 11: DONOR RECORD AND FOLLOW-UP SHEET**

For start-up and developing NPOs, an Excel spreadsheet can be an effective way of tracking donor information. Established NPOs should consider Customer Relation Management (CRM) software to help manage donor information and communications. Some companies offer free or discounted software to NPOs with a license and/or who complete a required application process.

For NPOs that are planning to track donors using an Excel spreadsheet, the following chart indicates data elements to include on the spreadsheet:

| **Last name** | **First name** | **Company** | **Address** | **Email** | **Phone** | **Solicitor** | **Donation Date** | **Donation Amount** | **General donation or note specific program** | **Written thank you date** | **Donor visit date** | **Program report sent date** | **Other communication** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
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Excel spreadsheets work well to record this information, for the following reasons: Excel spreadsheets work well to record this information, for the following reasons:

Column width can be adjusted to capture needed information.

The donor data base can be sorted based on the information you need. For example, you can sort by donation amount (for example, all donors donating more than a certain amount) or by the type of donation (general donation or targeted for a particular program)

You can set up the spreadsheet so that it keeps a running total of the amount donated.

At a glance, you can check to make sure that important follow-up, such as sending thank you notes, has occurred.

By sorting and analyzing the data, you can determine the giving pattern of individual donors. How many donations have they made to date, how frequently do they donate, what is the total amount they have donated, and what is the average donation size? This information is very important in identifying your most valuable donors, so that they can be encouraged to continue and grow their support for your NPO.

Following is a format for tracking follow-up requests for larger donors:

| **Donor name** | **Letter/email**  **date** | **Phone call date** | **Meeting date** | **Amount requested** | **Amount received** | **Date received** | **Donor requirements for use of donations (if any)** |
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Finally, here is a format for recording detailed information about large donors:

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| Donor name |  | | |
| Company |  | | |
| Contact information | Address: Phone: Email: | | |
| Contact history | Date of Contact | Contact history | Date of Contact |
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| Donation History | Date of Donation | Donation History | Date of Donation |
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| Other important information about this donor: |  | | |