

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)

Finally, here is a format for recording detailed information about large donors:

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