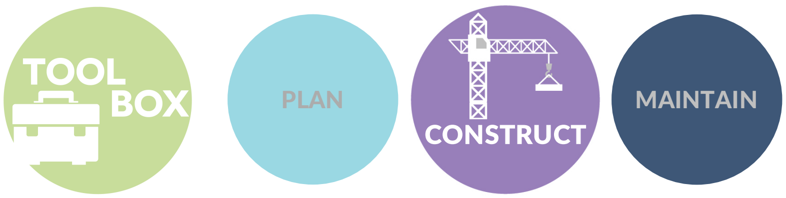
Recordkeeping and Tracking



While it may seem like an obvious step in the fund development process, many organizations don't have a good system of recordkeeping in place, resulting in a significant loss of important information. Tracking multiple aspects of your campaigns over time can help with efficiency, planning, and predictions for the future.

Donor Data

Donor Data – should include, but not be limited to the following:

- **Name**
    - Preferred nickname, if any
    - Use of Dr. or Ms. or Mrs.
    - Others in household
- **Address**
    - Home
    - Business
- **Contact info**
    - note preferred method of contact (office phone, email, mobile number)
- **Occupation**
- **How contact was developed**
    - Personal outreach (note by whom)
    - Former client
    - Attended an event
- **Giving history**
    - Amounts donated
    - Goods/services donated
    - Dates of each donation
    - Method of giving (online, mail, sponsored specific event)
    - Dates and method of thanking (formal letter, call, newsletter recognition)
- **Events attended** (fundraising gala, back-to-school night, golf tournament)

- **Volunteer history**
- Other **relevant community connections** (serves on city council, friends with Board Treasurer, member of Rotary Club)
- Section for extra notes

Fund Development Data

Fund Development Data – should include, but not be limited to the following:

- **Type** of event or campaign
- **Dates** (may include planning periods for specific events)
- **Amount spent** on up-front costs
- Number of paid **work hours** invested
- Number of **volunteer hours** invested
- Original **funding goal** amount
- Actual **amount raised**
- **Lessons Learned** section

Using the Information

Once your database begins to fill up, you can use it to search for patterns and plan ahead for future events or campaigns. With time, you may discover new items that would be beneficial to add, so by all means, allow it to evolve according to your needs. If you have the resources available, you might consider purchasing donor database software, but if not, there is plenty you can do with a simple, well-crafted spreadsheet. Below are just some of the many patterns you may be able to easily track and use to inform your development as it grows:

- **Timing of gifts**
  - Do certain people always give in July?
  - Does your mailing in March yield little results?
  - Do employees of a major business in your town always donate during their company's annual service drive?
- **Method of giving**
  - Which donors use the links provided in emails vs. mailing in checks?
  - Do certain donors only give when there is a specific cause identified? (e.g. new playground, food bank, roof repair.)
- **Amount of giving**
  - Categorizing in terms of large vs. small donors can help you see areas of success and possibilities for improvement.
  - Remember to have some special perks or attention for your largest donors, yet make sure all donors are recognized.

- **Consistency of giving**
    - Noticing who has given every year for a number of years – regardless of the amount – is important. Loyalty and commitment warrant special recognition.
    - Noticing a lapse in giving or those who have stopped altogether can help you clean up your lists. Determine a time frame for keeping them (2 years, 6 mailings, 4 invites to events, etc.) and delete if there has been no activity in that period.
- **Event attendance**
    - Do some donors only attend events where they can socialize with others?
    - Do certain donors support the same family functions each year, but don't come to any adult or evening events?
    - Do some donors give small amounts, but valuably attend every event and invite at least a few new friends each time?
- **Communication patterns**
    - Do some donors only respond to business sponsorship requests?
    - Does a certain donor always call back when Nick the Director calls, but ignores all of Sam the Board Member's messages?