



**First**, make sure your donor data is entered CORRECTLY. Some nonprofits have donors listed numerous times, creating duplicate records. When this occurs, it will take time to sort out and “de-dupe” the master donor list, especially if there are names not associated with spouses or partners, names entered incorrectly, or donors listed under nicknames. (Hint: Whoever is hired to enter your donor data needs to be meticulously accurate! Do not assign this critical role to someone whose work has not been tested! The clean-up can be painful and costly.)

**Second**, sort your list by certain helpful criteria, such as:

1. The cumulative total of all-time gifts by each individual donor (historic gift amount).
2. The total of all-time gifts in financial ranges important to your organization. (For example: Under \$1,000, \$1,000 to \$4,900, \$5,000 and above, \$10K+, \$25K+, etc.)
3. Each donor’s largest single (one-time) gift.
4. How many years the donor has given in succession. This shows donor loyalty and longevity. This list also is helpful when you want to analyze groups of loyal donors, segmenting those who have given for 10 years, five years, etc. It’s *also* helpful to show when a donor has lapsed.
5. The affiliation of the donor to the organization. (Board member? Community leader? Special event chairman/woman? Certain industry?)
6. Donors’ contributions by campaign (annual giving campaign, special types of campaigns such as capital campaigns, special events such as galas, etc.).
7. Donors’ contributions by program, to determine who has contributed (or restricted donor investments) to certain programs.

**Third**, run your reports and prioritize the information according to what’s most important to analyze. Your donor lists should be practical and sorted according to what you need to know. Here’s *a very basic example* of what a donor list could look like.

Donor last name	Donor first name	Contact info... note that you should separate address, city, state, zip, code, e-mail, etc. into separate columns – your spreadsheet expert could help you structure this.	Cumulative giving	Largest one-time gift	Donor affiliation	Donor program focus or initiative/campaign (this could be split into major campaign columns to break out the data, if there are multiple areas of support... this includes online giving)
Peterson	Robert	Address here	100,000	10,000	Board Member	Etc.
Barker	Karen	Address here	1,200	500	Family of nonprofit client	Etc.

As you sort and segment your donor groups, you then can determine top donors for recognition, future asks, and determine if there are lapsed donors who may need to be re-engaged.

Through the Association of Fundraising Professionals (AFP) and donor database websites, there are many donor database articles and resources to be found online. Here’s an article about finding the right database system to match the size of your nonprofit: <http://nonprofitshub.org/volunteer-management/finding-right-donor-database-nonprofit/>