

National Services Te Paerangi

Collecting Fundraising data - a simple example

This layout shows some of the columns you may want to use for collecting information about fundraising for your organisation.

Donor Name	Email	Phone	Address	Town/City	Preferred contact method	Position	Company	Amount of contribution	Type of contribution	Date of contribution	Contribution notes	Other Notes
Example 1 Neville Anderson	Nev@Andersons.co.nz	(04)453 7567 (Mob) 022 578345	26 Willowbank Drive	Waikanae	Phone	CEO	Bygrave & Sons (Tannery)	\$10,000	Sponsorship	DD/MM/YY	Thanked on DD/MM/YY by Chairman (phone call)	[See notes box below]
Example 2 Doreen Bayliss	Baylissd@netland.com	(06)567 7653	342 Hillary Cres	Halcombe	Email	Owner/operator	Bayliss Automotive	\$10.00	Friends subscription	DD/MM/YY		
Example 3 Bill and Janice Campbell	Bill-Jan@foxton.net	(04)811 9877 (Mob) 021756438	Greenvale RD3, River Heights	Hamilton	Email	Retired		\$100	Cash donation	DD/MM/YY	Donated in thanks for family history research help	

Notes field

The “notes” field can become very large but it’s better to record all relevant details about contact made with each donor / sponsor, so that the information stays up to date within the organisation.

Notes might include:

- correspondence such as when they are ‘thanked’, newsletters sent or reports submitted, including dates.
- how and when the contact was initiated, and the relationship manager within the organisation.
- personal details such as their interests which are relevant to museum work (such as an interest in sculptures, or butterflies!).

Conscientious CRM managers also add notes around their networks, business and personal interests and family details - this personal care can go a long way, and it can also help with knowing when to ask for more money.

