

# SAMPLE DONOR ENGAGEMENT TRACKING SHEET

Donor Name: \_\_\_\_\_

Date of Initial Gift: \_\_\_\_\_

Last Contribution Date: \_\_\_\_\_

Retention Rate: \_\_\_\_\_

Repeat Giving Rate: \_\_\_\_\_

Upgraded Giving Rate: \_\_\_\_\_

Engagement Rate: \_\_\_\_\_

Average Gift Size: \_\_\_\_\_

Notes/Comments:

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# INSTRUCTIONS:

Fill in the donor's name and the dates of their initial gift and last contribution.

Calculate and record the following metrics based on the provided formulas:

- Retention Rate:  $\text{Number of donors who continue to give} / \text{Total Number of donors} * 100$
- Repeat Giving Rate:  $\text{Number of donors who gave more than once} / \text{Total number of donors} * 100$
- Upgraded Giving Rate:  $\text{Number of donors who increased their giving amount} / \text{Total Number of donors} * 100$
- Engagement Rate:  $\text{Number of engaged donors (attending events, volunteering, sharing on social media, etc.)} / \text{Total Number of donors} * 100$
- Average Gift Size:  $\text{Total amount of contributions received} / \text{Number of contributions}$

Use the "Notes/Comments" section to jot down any observations or important details regarding the donor's engagement or interactions.

By regularly updating this tracking sheet for each donor, you can monitor and assess your donor engagement efforts, identify trends, and track progress over time. This information will help inform your decision-making and enable you to make data-driven improvements to your fundraising program.

**Note:** The provided formulas are general examples. Please adjust them to align with your data collection methods and reporting needs.