

## Donor Management Toolkit

From Holdings — [getholdings.com](https://getholdings.com)

Everything a small nonprofit needs to track donors, acknowledge gifts, and build a year-round stewardship plan. Adapt these templates to fit your organization.

### 1. Donor Tracking Spreadsheet

Create a spreadsheet (Google Sheets or Excel) with these columns:

Column	Description	Example
Donor ID	Unique identifier	D-001
First Name		Maria
Last Name		Rodriguez
Preferred Name	How they like to be addressed	Maria
Spouse/Partner		Carlos Rodriguez
Mailing Address	Full address	123 Main St, Denver, CO 80202
Email	Primary email	maria@email.com
Phone	Primary phone	(303) 555-1234
Employer	For matching gift lookup	Acme Corp
Source	How they found you	Board referral — Tom S.
First Gift Date		2024-03-15
First Gift Amount		\$100
Most Recent Gift Date		2026-01-10

Most Recent Gift Amount		\$250
Cumulative Giving	Total all-time	\$850
# of Gifts	Total count	5
Average Gift		\$170
Giving Frequency	Annual, monthly, sporadic	Annual (December)
Donor Status	New / Repeat / Lapsed / Monthly / Major	Repeat
Giving Level	Your tier (e.g., Bronze/Silver/Gold)	Silver (\$100-\$499)
Programs of Interest	What they care about	Youth education
Communication Pref	Email, mail, phone, text	Email
Last Thank-You Date		2026-01-12
Last Personal Contact	Phone/meeting/note	Called 2026-01-15
Notes	Anything relevant	Mentioned interest in volunteering. Daughter in our program.
Major Donor Prospect	Y/N	Y
Monthly Donor	Y/N	N

### Tips:

- Update after every gift and every interaction
- Run a "lapsed donor" filter monthly: Most Recent Gift Date > 13 months ago
- Sort by Cumulative Giving to identify major donor prospects
- Color-code by status: Green = active, Yellow = at risk, Red = lapsed

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## 2. Acknowledgment Letter Templates

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### Template A: First-Time Donor

> Dear [Preferred Name],

>

> Thank you for your gift of \$[amount] to [Organization Name]. This is your first gift to us, and we don't take that lightly.

>

> Your contribution will [specific impact — e.g., "provide 10 meals for families in our emergency food program" or "fund supplies for our after-school tutoring program for one month"].

>

> We'd love for you to see our work firsthand. [Invitation — e.g., "Join us for our next open house on [date]" or "Visit our website at [URL] for stories from the people you're helping."]

>

> If you have any questions about our programs or how your gift is being used, please don't hesitate to reach out. I'm at [email] or [phone].

>

> With gratitude,

>

> [ED Name]

> [Title]

> [Organization Name]

>

> ---

> *For your tax records: [Organization Name] is a 501(c)(3) nonprofit (EIN: [number]). You received no goods or services in exchange for this contribution. The full amount of your gift of \$[amount] on [date] is tax-deductible to the extent allowed by law.*

### **Template B: Repeat Donor**

> Dear [Preferred Name],

>

> Thank you for your continued support of [Organization Name]. Your gift of \$[amount] brings your cumulative giving to \$[total] — and every dollar has made a difference.

>

> Since your first gift in [year], here's what [Organization Name] has accomplished: [2-3 bullet points of organizational impact — e.g., "Served 1,200 families," "Expanded to two new

locations," "Launched our job training program"].

>

> You've been part of that from the start, and we're grateful.

>

> [Personal note if applicable — e.g., "I remember our conversation at last year's gala about your connection to this cause. That kind of passion is what keeps us going."]

>

> Thank you for believing in our mission.

>

> Warmly,

>

> [ED Name]

> [Title]

>

> ---

> *Tax receipt: [Same language as Template A]*

### **Template C: Major Donor (\$1,000+)**

> Dear [Preferred Name],

>

> I want to personally thank you for your extraordinary gift of \$[amount] to [Organization Name].

>

> A gift of this significance enables us to [specific, high-impact outcome — e.g., "fully fund our summer literacy program for 25 children" or "launch our new workforce development initiative"]. I want to make sure you see exactly how your investment is being used, so I'll be sharing updates with you [quarterly/monthly] as the program progresses.

>

> I'd also love to invite you to [specific opportunity — e.g., "a private tour of our new facility," "lunch with our program director," "our annual donor appreciation dinner on [date]"].

>

> Your generosity isn't just funding programs — it's transforming lives. Thank you for trusting us with this investment.

>

> With deep appreciation,

>

> [ED Name]

> [Title]

> [Direct phone number]

> [Direct email]

>

> ---

> *Tax receipt: [Same language as Template A]*

#### **Template D: Year-End Summary (for Monthly and Repeat Donors)**

> Dear [Preferred Name],

>

> As [year] comes to a close, I want to make sure you know what your generosity accomplished.

>

#### **> Your giving in [year]:**

> - Total gifts: \${total}

> - Number of contributions: [count]

> - [If monthly donor: "As a monthly sustainer, your consistent support provided reliable funding all year long."]

>

#### **> What your support made possible in [year]:**

> - [Impact metric 1]

> - [Impact metric 2]

> - [Impact metric 3]

>

> You can use this letter as a summary of your tax-deductible contributions for [year].  
[Organization Name] (EIN: [number]) is a 501(c)(3) organization, and no goods or services were provided in exchange for your contributions unless otherwise noted.

>

> Thank you for being part of this community. Here's to an even greater [next year].

>

> Gratefully,

>

> [ED Name]

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### 3. Annual Stewardship Calendar

Month	Task	Audience	Owner
<b>January</b>	Send year-end giving summaries + tax receipts	All donors from prior year	Development staff
	Run prior year retention report	Internal	ED / Development
	Identify lapsed donors for re-engagement	Lapsed (13+ months)	Development staff
<b>February</b>	Board members write 10 handwritten thank-you notes each	Recent donors	Board members
	Launch lapsed donor re-engagement campaign	Lapsed donors	Development staff
<b>March</b>	Send impact report / spring newsletter	All donors + prospects	ED / Communications
	Schedule spring major donor meetings	Major donors	ED
	Review and update donor database	Internal	Development staff
<b>April</b>	Host spring event or open house	All donors + community	Event committee
	First-quarter giving report to board	Board	ED / Finance
	Personal calls to new Q1 donors	New donors	ED / Board members

<b>May</b>	Plan annual campaign (Q4) — set goal, theme, timeline	Internal	ED / Development
	Major donor cultivation meetings	Major donor prospects	ED
<b>June</b>	Mid-year impact update email	All donors	Communications
	Run mid-year retention check	Internal	Development staff
	Monthly giving program promotion push	All contacts	Development staff
<b>July</b>	Database cleanup — verify addresses, remove duplicates	Internal	Development staff
	Board members make personal thank-you calls	Top 20 donors	Board members
<b>August</b>	Plan Giving Tuesday campaign	Internal	Development / Communications
	Begin annual campaign creative (letters, emails, social)	Internal	Communications
<b>September</b>	Send fall newsletter / impact stories	All donors + prospects	Communications
	Finalize annual campaign materials	Internal	Development
	Second-quarter major donor meetings	Major donors	ED
<b>October</b>	Launch annual campaign — first appeal	All donors + prospects	Development
	Personal calls to major donor prospects	Major donors	ED
	Board members share campaign on personal networks	Public	Board members
<b>November</b>	Giving Tuesday campaign execution	All contacts + public	Full team
	Second annual campaign appeal	All donors	Development
	Plan year-end push and deadline messaging	Internal	Development

<b>December</b>	Year-end appeal (mail + email + social)	All donors + prospects	Development
	Final push Dec 28-31 (tax deadline messaging)	All contacts	Development
	Personal year-end calls to top donors	Major donors	ED
	Prepare year-end giving summaries	Internal	Finance / Development

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## 4. Lapsed Donor Re-Engagement Email Series

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### Email 1: "We Miss You" (Send at 13 months since last gift)

**Subject:** We noticed you've been away, [First Name]

> Hi [First Name],

>

> It's been a while since we've heard from you, and I wanted to reach out personally.

>

> Your past support of [Organization Name] helped us [specific impact from their giving period]. That work continues because of donors like you.

>

> I'd love to share what we've been up to. [One compelling recent accomplishment or story.]

>

> No ask today — just wanted you to know you're missed and valued.

>

> Warmly,

> [ED Name]

### Email 2: "Here's What's Happened" (Send 2 weeks after Email 1)

**Subject:** A lot has happened at [Organization Name]

> Hi [First Name],

>

> Since your last gift in [month/year], here's what [Organization Name] has accomplished:

>

> - [Impact metric 1]

> - [Impact metric 2]

> - [Impact metric 3]

>

> None of this would have been possible without supporters like you. Every gift — no matter the size — moves our mission forward.

>

> Want to see it for yourself? [Invitation to event, virtual tour, or website update.]

>

> [ED Name]

### **Email 3: "Will You Rejoin Us?" (Send 2 weeks after Email 2)**

**Subject:** Can we count on you again, [First Name]?

> Hi [First Name],

>

> I'll keep this short. [Organization Name] is [current campaign or urgent need — e.g., "raising \$50,000 to fund our summer program for 100 kids"].

>

> Your past giving of \$[last gift amount] made a real difference. A gift today — any amount — helps us [specific impact].

>

> [Donate button/link]

>

> If your circumstances have changed or you'd prefer to support us in a different way (volunteering, sharing our work, attending events), we'd love that too. Just reply to this email.

>

> Thank you for everything you've done for our community.

>

> [ED Name]

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## 5. Monthly Giving Program Launch Checklist

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- Name the program (e.g., "The [Organization] Circle," "Monthly Champions")
  - Set suggested giving levels (\$10, \$25, \$50, \$100/month) with impact statements for each
  - Create a dedicated landing page with recurring payment option
  - Write launch email (to all current donors)
  - Write social media posts (3-5 variations)
  - Create a "Why I give monthly" testimonial from a board member or current donor
  - Set up automated welcome email for new monthly donors
  - Set up quarterly impact update email template for monthly donors
  - Set up annual giving summary (January) for monthly donors
  - Plan annual upgrade ask (month 11 or anniversary month)
  - Add monthly giving option to all donation forms and appeals
  - Brief board members to promote in their networks
  - Track: # monthly donors, avg monthly gift, retention rate, upgrade rate
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*This toolkit is for informational purposes only and does not constitute financial or legal advice. Consult your accountant, attorney, or fundraising advisor for guidance specific to your organization.*

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