

Donor Management Report Card



Nonprofit Accounting | Donor Management | Grant Management
 Email Marketing | Online Fundraising

ONE INTEGRATED PLATFORM

For each statement below, circle the response that best describes your organization. Then add up the total points at the bottom to see your score.

Donor Management Evaluation Criteria	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
We use CRM / donor management software that is designed for nonprofits	1	2	3	4	5
We always send thank yous to donors in a timely manner	1	2	3	4	5
We can easily identify lapsed donors using reports like LYBUNT and SYBUNT or other tools	1	2	3	4	5
We track donor data that is unique to our organization	1	2	3	4	5
We segment our donors when sending out emails	1	2	3	4	5
We closely track and manage first-time donors	1	2	3	4	5
We can see a full record of donor interactions, including emails sent, opens, and clicks	1	2	3	4	5
We can easily track non-donation activity for donors (e.g. purchases, event attendance, volunteer activities)	1	2	3	4	5

Donations we receive are automatically recorded in our program and fundraising budgets	1	2	3	4	5
Sending year end donor letters is a simple and efficient process for our team	1	2	3	4	5
Subtotal					
Total Score					

Report Card Guide

Score 40 to 50 = Donor Management Pro

Great job! Your organization is doing lots of things right.

Score 25 to 39 = Work in Progress

You have a strong foundation, but there are some areas that need attention.

Score 24 or less = Room for Improvement

Not to worry! You already took the first step in improving your donor management processes by completing this report card.

If you scored in the **Work in Progress** or **Room for Improvement** categories, we invite you to schedule a free 30-minute consultation with our team. No sales pitches. No demos. Just time for you to ask questions and get answers.

Email support@monkeypod.io to schedule your free consultation.

Why Donor Management Matters

Donor management is critical for nonprofits and every donor counts, literally. According to the Fundraising Awareness Project, small and micro sized donors make up roughly 89% of the donor pool. MonkeyPod is here to help you level up your donor management skills and build a more sustainable organization.

Learn more at monkeypod.io