

SAMPLE

Donor engagement plan

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Catalogue of assets

Touchpoint	Use now	Consider adding later
WAYS TO THANK		
Tax acknowledgement letter within one week	X	
Thank you call from CEO within 24 hours	X	
Handwritten note from CEO	X	
Thank you video from CEO		X
Personal thank you letter signed by CEO	X	
Personal thank you letter signed by CDO	X	
Personal thank you letter signed by Relationship Manager	X	
Handwritten note from Relationship Manager	X	
Thank you video from relationship manager		X
Mail merged personal thank you email from Middle Giving Program Lead	X	
Personal thank you letter signed by Middle Giving Program Lead	X	
Handwritten note from Middle Giving Program Lead	X	
Thank you call from Middle Giving Program Lead	X	
Thank you note from board member	X	
Thank you call from board member	X	
Thank you note from program staff	X	
WAYS TO RECOGNIZE A GIFT		
Name in annual report	X	
Name on donor wall	X	
Name in top donor listing on website		X
Naming opportunities		X
Partnership story and images featured on top donor section of website		X
Press release announcing partnership		X
Recognition of top annual donors in all event programs		X
Signage celebrating top annual donors at events		X
Story featured on social media (if desired)	X	

Touchpoint	Use now	Consider adding later
Story featured on website (if desired)	X	
Story featured in newsletter (if desired)	X	
Story featured in annual report (if desired)	X	
Plaque/gift that donor can display		X
Awards program for philanthropic impact on our mission		X
Legacy Society pin/gift	X	
Award/gift presented at an event	X	
GIFT IMPACT		
Thanks for giving postcard	X	
Thanks for giving card from CEO	X	
Note from client	X	
Stewardship report	X	
Personalized stewardship report	X	
Annual meeting with program staff & relationship manager to review gift impact		X
Annual meeting with CEO to review gift impact		X
Volunteer thank you call 1x per year	X	
MISSION EXPERIENCE		
Direct response emails (all)	X	
Direct response emails (select)	X	
Mission update emails from Relationship Manager*	X	
Personalized on-the-ground videos		X
Monthly 'from the desk of the CEO' email	X	
eNewsletter (5x per year)	X	
Print newsletter (3x per year)	X	
Planned giving newsletter (2x per year)	X	
Annual report (electronic)	X	
Annual report (hard copy) with personalized cover letter	X	
Annual report (hard copy) with personalized cover letter from CEO	X	
Invitation to mission update town halls	X	
Invitation to breaking news previews with CEOs right before/during major releases		X
Opportunities to host lunch & learns with experts for company or clients		X
Invitations to group/community volunteer opportunities of interest	X	
Personalized volunteer opportunities	X	
Group tour/site visit (if desired)	X	
1:1 tour/site visit with CEO (if desired)	X	
COMMUNITY EXPERIENCES		
Invitation to special events of interest	X	
Invitation to VIP reception at special event	X	
Invitation to monthly small-group CEO breakfast chat		X
Invitation to parlor meetings and other cultivation events, as they arise	X	

Acknowledgement & recognition plan



Not in a portfolio

In a portfolio

Touchpoint	Lead	New monthly donor	Not in a portfolio			In a portfolio					Multi-year pledge signed	Multi-year pledge payment	Gift from board member	Gift from board alumni	Planned giving intention
			\$0-249	\$250-999	\$1,000-9,999	\$0-249	\$250-999	\$1,000-9,999	\$10,000-49,000	\$50,000+					
IMMEDIATELY FOLLOWING GIFT															
Tax acknowledgement letter within one week	Finance		X	X	X	X	X	X	X	X		X	X	X	
Thank you call from CEO within 24 hours	Relationship Manager									X					
Handwritten note from CEO	Relationship Manager									X	X		X	X	
Personal thank you letter signed by CEO	Stewardship Staff								X			X	X	X	
Personal thank you letter signed by CDO	Stewardship Staff							X							X
Personal thank you letter signed by Relationship Manager	Relationship Manager					X	X								
Handwritten note from Relationship Manager	Relationship Manager							X	X	X		X			
Mail merged personal thank you email from Middle Giving Program Lead	Middle Giving Program Lead	X	X		X										
Personal thank you letter signed by Middle Giving Program Lead	Middle Giving Program Lead	X	X	X											
Handwritten note from Middle Giving Program Lead	Middle Giving Program Lead				X										
Thank you call from Middle Giving Program Lead	Middle Giving Program Lead	X			X										
WITHIN 1 YEAR															
Thank you note from board member	Stewardship Staff				X			X	X			X			
Thank you call from board member	Stewardship Staff								X		X				X
Thank you note from program staff	Stewardship Staff								X	X	X	X	X	X	X
Name in annual report	Stewardship Staff				X			X	X	X		\$1,000+	\$1,000+	\$1,000+	X
Name on donor wall	Stewardship Staff								X	X					X
Story featured on social media (if desired)	Relationship Manager									X	X		X	X	

Touchpoint	Lead	New monthly donor	\$0-249	\$250-999	\$1,000-9,999	\$0-249	\$250-999	\$1,000-9,999	\$10,000-\$49,000	\$50,000+	Multi-year pledge signed	Multi-year pledge payment	Gift from board member	Gift from board alumni	Planned giving intention
Story featured on website (if desired)	Relationship Manager									X	X	X	X	X	
Story featured in newsletter (if desired)	Relationship Manager									X	X	X	X	X	
Story featured in annual report (if desired)	Relationship Manager									X	X	X	X	X	
Legacy Society pin/gift	Stewardship Staff														X
Award/gift presented at an event	Stewardship Staff									X					

Donor experience plan

Touchpoint	Coordinator	Sustainers	Middle giving	Tier 3	Tier 2	Tier 1	Board	Board alumni	Planned giving
RELATIONSHIP MANAGEMENT									
Regularly 1:1 interaction with CEO	Relationship Manager				X	X	X	X	
Managed in a portfolio (assigned a personal Relationship Manager)	CDO assigns			X	X	X	X	X	
Managed as a special group (assigned to a Program Lead)	CDO assigns	X	X						X
Personalized solicitation, sometimes supported by personalized appeals	Relationship Manager				X	X		X	
Blend of personalized solicitations and general appeals	Program Lead		X	X					X
General appeals	Program Lead	X							
IRA rollover email	Planned Giving	X	X	X	X	X	X	X	X
IRA rollover postcard	Planned Giving								X
GIFT IMPACT									
Thanks for giving postcard	Stewardship Staff	X	X	X				X	X
Thanks for giving card from CEO	Stewardship Staff				X	X	X		
Note from client	Stewardship Staff	X	X	X	X	X	X	X	X
Stewardship report	Relationship Manager			X	X		X		
Personalized stewardship report	Relationship Manager					X			
Volunteer thank you call 1x per year	Stewardship Staff	X	X	X	X	X	X	X	X
MISSION EXPERIENCE									
Direct response emails (all)	Marketing	X	X						X
Direct response emails (select)	Marketing			X	X	X	X	X	
Mission update emails from Relationship Manager*	Stewardship Staff			X	X	X		X	

Touchpoint	Coordinator	Sustainers	Middle giving	Tier 3	Tier 2	Tier 1	Board	Board alumni	Planned giving
Monthly 'from the desk of the CEO' email	Stewardship Staff				X	X	X	X	
eNewsletter (5x per year)	Stewardship Staff	X	X	X	X	X	X	X	X
Print newsletter (3x per year)	Stewardship Staff			X	X	X	X	X	
Planned giving newsletter (2x per year)	Stewardship Staff								X
Annual report (electronic)	Stewardship Staff	X	X						X
Annual report (hard copy) with personalized cover letter	Stewardship Staff			X	X			X	
Annual report (hard copy) with personalized cover letter from CEO	Stewardship Staff					X	X		
Invitation to mission update town halls	Stewardship Staff	X	X	X	X	X	X	X	X
Invitations to group/community volunteer opportunities of interest	Relationship Manager	X	X	X	X	X	X	X	X
Personalized volunteer opportunities (if desired)	Relationship Manager			X	X	X	X	X	
Group tour/site visit (if desired)	Relationship Manager	X	X	X	X	X	X	X	X
1:1 tour/site visit with CEO (if desired)	Relationship Manager				X	X	X	X	
COMMUNITY EXPERIENCES									
Invitation to special events of interest	Relationship Manager	X	X	X	X	X	X	X	X
Invitation to VIP reception at special event	Stewardship Staff			X	X	X	X	X	
Invitation to parlor meetings and other cultivation events, as they arise	Relationship Manager			X	X	X	X	X	X

 = part of annual stewardship program coordinated by Stewardship Staff (see: Donor Experience Calendar)

 = individualized touchpoints coordinated by Relationship Manager or Program Lead

* template created by Stewardship Staff and sent by Relationship Manager

Donor experience calendar



Touchpoint	Month	Creating	Coordinator	General Donors	Sustainers	Middle giving	Tier 3	Tier 2	Tier 1	Board	Board alumni	Planned giving
eNewsletter	(01) January	Marketing & Communications	Marketing & Communications	X	X	X	X	X	X	X	X	X
Monthly 'from the desk of the CEO' email	(01) January	Stewardship Staff	Stewardship Staff					X	X	X	X	
Direct response email #1	(01) January	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #2	(01) January	Stewardship Staff	Stewardship Staff	X	X	X	X					
Print newsletter	(02) February	Marketing & Communications	Stewardship Staff				X	X	X	X	X	X
Monthly 'from the desk of the CEO' email	(02) February	Stewardship Staff	Stewardship Staff					X	X	X	X	
Direct response email #3	(02) February	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #4	(02) February	Stewardship Staff	Stewardship Staff	X	X	X	X					
eNewsletter	(03) March	Marketing & Communications	Marketing & Communications	X	X	X	X	X	X	X	X	X
Monthly 'from the desk of the CEO' email	(03) March	Stewardship Staff	Stewardship Staff					X	X	X	X	
Direct response email #5	(03) March	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #6	(03) March	Stewardship Staff	Stewardship Staff	X	X	X	X					
Invitation to mission update town hall	(03) March	Marketing & Communications	Stewardship Staff		X	X	X	X	X	X	X	X
IRA rollover email	(03) March	Marketing & Communications	Planned Giving	X	X	X	X	X	X	X	X	X
IRA rollover postcard	(03) March	Marketing & Communications	Planned Giving									X
eNewsletter	(04) April	Marketing & Communications	Marketing & Communications	X	X	X	X	X	X	X	X	X
Monthly 'from the desk of the CEO' email	(04) April	Stewardship Staff	Stewardship Staff					X	X	X	X	
Direct response email #7	(04) April	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #8	(04) April	Stewardship Staff	Stewardship Staff	X	X	X	X					

Touchpoint	Month	Creating	Coordinator	General Donors	Sustainers	Middle giving	Tier 3	Tier 2	Tier 1	Board	Board alumni	Planned giving
Invitation to special event #1	(04) April	Marketing & Communications	Stewardship Staff	X	X	X	X	X	X	X	X	X
Invitation to special event #1 - VIP reception	(04) April	Marketing & Communications	Stewardship Staff				X	X	X	X	X	
Print newsletter	(05) May	Marketing & Communications	Stewardship Staff				X	X	X	X	X	X
Monthly 'from the desk of the CEO' email	(05) May	Stewardship Staff	Stewardship Staff					X	X	X	X	
Direct response email #9	(05) May	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #10	(05) May	Stewardship Staff	Stewardship Staff	X	X	X	X					
eNewsletter	(06) June	Marketing & Communications	Marketing & Communications	X	X	X	X	X	X	X	X	X
Monthly 'from the desk of the CEO' email	(06) June	Stewardship Staff	Stewardship Staff					X	X	X	X	
Direct response email #11	(06) June	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #12	(06) June	Stewardship Staff	Stewardship Staff	X	X	X	X					
Note from client/expert	(06) June	Stewardship Staff	Stewardship Staff		X	X	X	X	X	X	X	X
Monthly 'from the desk of the CEO' email	(07) July	Stewardship Staff	Stewardship Staff					X	X	X	X	
Direct response email #13	(07) July	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #14	(07) July	Stewardship Staff	Stewardship Staff	X	X	X	X					
Monthly 'from the desk of the CEO' email	(08) August	Stewardship Staff	Stewardship Staff					X	X	X	X	
Direct response email #15	(08) August	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #16	(08) August	Stewardship Staff	Stewardship Staff	X	X	X	X					
Annual report (hard copy) with personalized cover letter	(09) September	Marketing & Communications	Stewardship Staff				X	X			X	
Annual report (hard copy) with personalized cover letter from CEO	(09) September	Marketing & Communications	Stewardship Staff						X	X		
eNewsletter	(09) September	Marketing & Communications	Marketing & Communications	X	X	X	X	X	X	X	X	X
Print newsletter	(09) September	Marketing & Communications	Stewardship Staff				X	X	X	X	X	X

Touchpoint	Month	Creating	Coordinator	General Donors	Sustainers	Middle giving	Tier 3	Tier 2	Tier 1	Board	Board alumni	Planned giving
Monthly 'from the desk of the CEO' email	(09) September	Stewardship Staff	Stewardship Staff					X	X	X	X	
Direct response email #17	(09) September	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #18	(09) September	Stewardship Staff	Stewardship Staff	X	X	X	X					
Invitation to mission update town hall	(09) September	Marketing & Communications	Stewardship Staff		X	X	X	X	X	X	X	X
Annual report (electronic)	(10) October	Marketing & Communications	Stewardship Staff		X	X						X
Monthly 'from the desk of the CEO' email	(10) October	Stewardship Staff	Stewardship Staff					X	X	X	X	
Direct response email #19	(10) October	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #20	(10) October	Stewardship Staff	Stewardship Staff	X	X	X	X					
Invitation to special event #1	(10) October	Marketing & Communications	Stewardship Staff	X	X	X	X	X	X	X	X	X
Invitation to special event #1-VIP reception	(10) October	Marketing & Communications	Stewardship Staff				X	X	X	X	X	
Thanks for giving postcard	(11) November	Marketing & Communications	Stewardship Staff		X	X	X				X	X
Thanks for giving card from CEO	(11) November	Marketing & Communications	Stewardship Staff					X	X	X		
eNewsletter	(11) November	Marketing & Communications	Marketing & Communications	X	X	X	X	X	X	X	X	X
Monthly 'from the desk of the CEO' email	(11) November	Stewardship Staff	Stewardship Staff					X	X	X	X	
Direct response email #21	(11) November	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #22	(11) November	Stewardship Staff	Stewardship Staff	X	X	X	X					
Year-end general appeal	(11) November	Marketing & Communications	Marketing & Communications	X	X	X						X
Year-end personalized appeal	(11) November	Stewardship Staff	Stewardship Staff				X	X	X	X	X	
Monthly 'from the desk of the CEO' email	(12) December	Stewardship Staff	Stewardship Staff					X	X	X	X	
Direct response email #23	(12) December	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #24	(12) December	Stewardship Staff	Stewardship Staff	X	X	X	X					
Direct response email #25	(12) December	Stewardship Staff	Stewardship Staff	X	X	X	X					

Touchpoint	Month	Creating	Coordinator	General Donors	Sustainers	Middle giving	Tier 3	Tier 2	Tier 1	Board	Board alumni	Planned giving
Direct response email #26	(12) December	Stewardship Staff	Stewardship Staff	X	X	X	X					

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