

[Organization Name] Donor Engagement Plan [Year]									
Goal:	[Enter your overall goal here, e.g. raise number of recurring donors by 20%]								
Activity	Responsibility	Timeline	New donors	General donors	Mid-level donors	Recurring donors	Planned giving	Major donors	Volunteers
Thank you email	Marketing	Within 24 hours	x						
Handwritten thank you note	Coordinator	Within 7 days	x					x	
Thank you call from board member	Coordinator / Board	Within 7 days	x					x	
Welcome email	Marketing	Within 24 hours	x						
Social media shoutout	Marketing	Annually					x	x	
Project update	Coordinator	Quarterly		x	x	x		x	
Campaign launch email	Coordinator / Marketing	Quarterly		x	x				
Donor feedback survey	Coordinator	Annually		x	x	x	x	x	x
Anniversary card	Coordinator	Annually		x	x	x	x	x	x
Donor stewardship report	Coordinator	Annually		x	x	x		x	
Annual giving summary	Coordinator	Annually		x	x	x		x	
Gala event invitation	Coordinator / Marketing	Quarterly			x			x	
Volunteer lunch invitation	Coordinator	Annually							x