

Donor Engagement & Fundraising Calendar

A year-round guide for engaging donors and strengthening long-term support



January–February | Reflect & Reconnect

- Review your year-end giving activity to identify your most engaged donors and those who already support, or may be interested in supporting, your endowment.
- As you complete thank-you notes and follow-ups, note donors who may be ready for deeper engagement.
- Begin one-on-one outreach focused on planning for the year ahead, including early conversations around Qualified Charitable Distributions (QCDs).

Key giving focus: New-year planning and QCD conversations

March–April | Tax-Time Engagement

- Continue outreach as donors review their finances and tax returns with advisors.
- Share reminders about the benefits of giving appreciated stock and other tax-efficient gifts.
- Use spring themes focused on organization, planning, and charitable goals for the year.
- Re-share or reinforce earlier messages during phone calls or meetings to increase impact.

Key giving focus: Tax season and appreciated assets

May–June | Planned Giving Conversations

- Use this quieter period to engage donors in thoughtful conversations about the future.
- Focus on bequests, IRA beneficiary designations, and other planned gifts that support long-term sustainability.
- Share mid-year updates or light educational content related to charitable giving.

Key giving focus: Legacy and estate planning

July–August | Planning & Awareness

- Share relevant tax or legislative updates that may impact charitable giving.
- August is Make a Will Month, an ideal time to encourage conversations around estate planning, business succession, and legacy giving.
- Begin forecasting fall and year-end fundraising efforts.

Key giving focus: Make a Will Month (August)

September–October | Prepare for Year-End

- Encourage donors to assess progress toward their annual giving goals.
- Prompt early action on planned gifts and QCDs to avoid year-end deadlines.
- Prioritize personal outreach to donors who have supported your endowment or expressed interest in doing so.
- Consider small stewardship touches for long-time or legacy donors.

Key giving focus: QCD planning and donor stewardship

November–December | Year-End Giving

- Highlight the variety of ways donors can give, including stock, QCDs, IRA beneficiary designations, and online gifts.
- Clearly communicate year-end deadlines for different gift types.
- Be highly responsive to donor questions and requests.
- Reinforce the lasting impact of endowment giving during the season of generosity.

Key giving focus: Giving Tuesday and year-end deadlines (December 31)

Need Help Engaging Your Donors?

If you're unsure how to approach a donor, explain giving options, or explore planned giving opportunities, **the Community Foundation is here to help.**