

Donor Engagement & Fundraising Calendar



January

- You've likely already reviewed your year-end activity to determine which donors were most active at year-end, and which of these active donors have already established a planned gift or have otherwise supported your endowment.
- As you finished up your thank you notes, you very likely ran across at least a handful of donors that seemed ready for deeper engagement. Let's carry that momentum forward!

February

- Reach out one-by-one to the donors you noted in January as potentially ready for deeper engagement. Messages along the lines of planning for the year ahead and taking advantage of QCDs early in the year will resonate well.
- Begin planning outreach to donors related to upcoming tax time. This is an excellent time to plant seeds with donors because they will be reviewing last year's financial and tax matters with their advisors.

March

- Continue your tax-time outreach noted above.
- Be sure to include reminders about the benefits of giving appreciated stock and the charitable deduction in general. This is important because as your donors review their tax return information for 2024, they may notice instances where they could (should!) have given appreciated stock instead of cash. They might also realize that they should have given more to charity than they did. This can help you generate gifts to your annual fund and endowment.

April

- Continue tax time reminders in all of your one-on-one communications. If you've promoted tax messages as noted above for March, you can get even more mileage out of the content by forwarding your March communications to donors in real time as you are on the phone with them. Sometimes people miss things in their email inboxes, but you always get a second chance to send it during a phone conversation or even live during a meeting.
- If you send an April communication, consider using "spring cleaning" types of themes about getting organized and planning 2025 charitable gifts to your annual fund and endowment fund. This can help increase donor giving during the first half of the year.

May

- This is the time of year that donors may be gearing up for some down time during the summer. This is an excellent time to lean into conversations about bequests, IRA beneficiary designations, and other types of planned gifts to your endowment.

June

- With tax time behind them, and the year-end rush still months away, donors and their advisors typically have more bandwidth to dig into discussions about including your organization's endowment in an estate plan. Just because the pace is slower doesn't mean the energy takes a hit! This is a great time to catch donors in a more relaxed mode.

- Focus your content on mid-year trends and summer reading ideas to learn about charitable giving.

July

- This is a good time of year to zero in on legislative and tax law updates. By this time in the year, we have a pretty good idea of legislative agendas. Plus, you want donors to start thinking about you for year-end transactions.
- The community foundation team is always a sounding board and resource for staying up-to-date with tax legislation that could impact your donors' giving habits.

August

- Make a Will Month is a useful time for bequest and estate planning reminders, incorporating charitable planning into a business succession plan, planned giving, and giving while living. Use these themes in your communications.
- Content can touch on not only Make a Will Month, but also forecasting the busy third and fourth quarters. Now is the time for donors to discuss endowment gifts, major gifts, and planned gifts.

September

- This is a really busy time of year, but you should not stop the drumbeat!
- Content can include encouraging donors to start looking at how their giving goals are shaping up for the year. If a donor has expressed intentions to set up a planned gift to your endowment fund, or give to your endowment fund via a Qualified Charitable Distribution, it's wise to set these transactions in motion now to avoid the year-end rush.

October

- This is a particularly good time for personal outreach to all donors who have given to your endowment fund in the past or expressed interest in doing so. Work your way through the list, touching base personally with each donor.
- Consider planning an outreach campaign to drop off holiday cards, cookies, or other small gifts to your legacy endowment donors.

November

- Focus your communications on reminders about the wide variety of assets that can be given to your endowment fund, and year-end deadlines for specific types of gifts such as checks, QCDs, gifts of publicly-traded stock, credit card gifts, etc.
- Emphasize the tax benefits of giving highly-appreciated stock to your endowment fund, as well as the benefits of naming your endowment fund as the beneficiary of an IRA.

December

- Be highly responsive to all donor inquiries; same day responsiveness is crucial, and ideally within the first couple of hours.
- Focus your marketing content on the importance of endowment giving and additional year-end tips.