



COMMUNITY SERVICES

Donor Engagement Planning Template

This tool will guide you through various steps and considerations in cultivating and retaining donors.



BOYS & GIRLS CLUBS OF AMERICA



Name:

Date:

Step 1: CURRENT STATE & VISION OF THE FUTURE

FINANCIAL GOALS (3 TO 5 YEAR)	

CURRENT DONOR LANDSCAPE	DONOR ENGAGEMENT GOALS

Step 2: DONOR AUDIENCE SEGMENTATION

TARGET DEMOGRAPHIC(S)

GIVING CAPACITY	PROGRAMMATIC INTEREST

Step 3: COMMUNICATION CHANNELS

ONLINE CHANNELS	OFFLINE CHANNELS

Step 4: ENGAGEMENT TOOLS

VALUE PROPOSITION/KEY TALKING POINTS

OUTREACH MATERIALS/COLLATERAL

Step 5: ENGAGEMENT PLAN

ENGAGEMENT OPPORTUNITY	ENGAGEMENT EXPECTATIONS

Step 6: RESOURCES NEEDED

RESOURCES NEEDED (HUMAN & FINANCIAL)
TOOLS & SYSTEMS

