

Fundraising with Flow: Engagement Toolkit

This 3-part toolkit offers nonprofit professionals simple, strategic tools to improve donor engagement without overwhelm. Each section gives you practical prompts and planning ideas you can implement month-by-month, with confidence and clarity.

1. Monthly Donor Engagement Themes

Build rhythm with your donors by anchoring each month around a central message or story. Here are 12 ideas to get you started:

- ✓ January – New Year Gratitude + Year in Review
- ✓ February – 'Why We Love Our Donors' (Valentine theme)
- ✓ March – Spring Impact Story or Program Highlight
- ✓ April – Volunteer Appreciation
- ✓ May – Mother's Day Reflections + Testimonials
- ✓ June – Mid-Year Progress Report
- ✓ July – Summer Snapshot + Behind-the-Scenes
- ✓ August – Back-to-School Story or Youth Feature
- ✓ September – Donor Anniversary Recognition
- ✓ October – Fall Success Story or Event Recap
- ✓ November – Thanksgiving Gratitude Campaign
- ✓ December – Holiday Wishes + Year-End Campaign Kickoff

2. Purposeful, Well-Timed Touchpoints

Map your engagement to where the donor is in their journey—not just where your organization is on the calendar. Match message to moment:

- ✓ Welcome Email – Immediately after first gift
- ✓ Impact Story – 2–4 weeks after welcome
- ✓ Phone Call – On donor anniversary or after major gift

- ✓ Invitation – Event, webinar, or behind-the-scenes tour
- ✓ Survey – 6 months into giving relationship
- ✓ Thank You Note – Handwritten or video after participation
- ✓ Holiday Message – Around a meaningful season or date

3. Easy-to-Follow Action Ideas & Reminders

Use these recurring reminders to stay on track without burnout:

- ✓ Block 90 minutes each week to plan messaging. Create a document to track messaging, or use CRM.
- ✓ Send 1 personalized message every week to a donor.
- ✓ Choose 1 donor story or photo to share each month.
- ✓ Schedule 1 feedback moment per quarter (e.g., survey, comment box).
- ✓ Create a 3-touchpoint journey for every new donor: Welcome, Story, Invitation. Document series for future reference.

About Angie Thompson

Angie Thompson is an independent nonprofit consultant and strategist specializing in donor engagement, fundraising communications, and creative program design. This content is provided for educational purposes and should be tailored to fit your organization's specific needs. For personalized consulting, visit www.AngieThompsonConsulting.com or email Angie@AngieThompsonConsulting.com.