

DONOR RELATIONS PLAN FOR {Donor Name} | Date:

Date Plan Created:

Revision Date:

Assigned:

<b>Donor Names</b>	<b>Areas Supported:</b>	<b>Notes</b>
<b>IDs</b>		
<b>Birthday</b>	<b>Main Area of Interest:</b>	
<b>Anniversary</b>		
<b>Family</b>		

Reports	Event Invitations	Communications/"Touches"
Ex: contact information updates, social media engagement, giving history	Ex: Annual event, lunch meeting, program tour	Ex: birthday card, monthly newsletter, appeal letters, phone call, etc

Date	Engagement Activity	Agenda Goal	Assignee	Notes/Next Steps