

Donor Engagement Worksheets

Donor Engagement					
Inspire					
Website					
Site Visitors Last Year	2240	Site Visitors Goal	2900	% Change	29%
Bounce Rate Last Year	65%	Bounce Rate Goal	40%	% Change	-38%
Session Duration Last Year	1.35	Session Duration Goal	2	% Change	48%
Conversion Rate Last Yr	4%	Conversion Rate Goal	5%	% Change	25%
Month	Method	Activity	Responsible	Date	
Jan	Post	Blog for new school semester tips	Jenkins	1/4/2024	
Jan	Email	Invite new members to subscribe to blog	Jenkins	1/6/2024	
Feb	Post	Blog for winter break educational activities	Jenkins	2/6/2024	
Feb	Revise	Revise homepage for new UI	Garcia	2/26/2024	
Feb	Email	Email all subscribers about new website	Jenkins	2/27/2024	
Mar	Post	Blog for testing preps	Jenkins	3/5/2024	
Apr	Post	Blog for spring break educational activities	Jenkins	4/2/2024	
Apr	Revise	Revise volunteer schedule and programs pages UI	Garcia	4/19/2024	
May	Post	Blog for summer camp	Jenkins	5/2/2024	
May	Email	Invite new members to subscribe to blog	Jenkins	5/5/2024	
Jun	Post	Blog for skipping the summer slide	Jenkins	6/6/2024	
Jun	Revise	Complete remained of website UI update	Garcia	6/30/2024	
Jun	Email	Email all subscribers about new website features	Jenkins	6/30/2024	
Outreach					
Outreaches Last Year	2	Outreaches This Year	6	% Change	200%
Last Year Attendees	19	Projected Attendees	56	% Change	195%
Month	Method	Activity	Responsible	Date	
Mar	Outreach	Jensen Estates Homeowners Association	Washington	3/14/2024	
Apr	Outreach	Kiwanis Club Luncheon	Verney	4/2/2024	
Apr	Outreach	Martin Chamber of Commerce	Incal	4/19/2024	
Apr	Contact	Identify potential outreachs for summer & fall	Incal	4/30/2024	
May	Outreach	Gold Coast HomeBuilders Association	Incal	5/6/2024	
Sep	Outreach	Franklin Teachers Association	Washington	9/19/2024	
Nov	Outreach	Marrietta Place Homeowners Association	Washington	11/4/2024	
Nov	Contact	Identify potential outreachs for winter & spring	Incal	11/15/2024	

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Inspire						
Partnerships						
Partnerships Last Year		1	Partnerships This Year		3	% Change 200%
Month	Method	Activity			Responsible	Date
Jan	Research	Create list of potential partnerships			Washington	1/16/2024
Jan	Call	Contact prospects and set up meetings			Washington	1/31/2024
Feb	Meet	Meet with Education Foundation			Washington	2/22/2024
Apr	Meet	Confirm County School Board partnership renewal			Washington	4/19/2024
Apr	Meet	Meet with Bixby Gym			Washington	4/23/2024
May	Meet	Meet with Jobs Corp			Washington	5/13/2024
May	Meet	Meet with Community Foundation			Washington	5/31/2024
Public Relations						
Features Last Year		2	Features This Year		6	% Change 200%
Last Year Impressions		20000	Projected Impressions		40000	% Change 100%
Month	Method	Activity			Responsible	Date
Jan	Submit	Press release for winter semester activities			Jenkins	1/3/2024
Apr	Pitch	Local news feature for spring break programs			Jenkins	4/12/2024
Apr	Submit	Press release for 5K race			Jenkins	4/29/2024
Apr	Pitch	Local news feature for 5K race			Jenkins	4/29/2024
May	Submit	Press release for summer camp			Jenkins	5/1/2024
May	Submit	Press release for Behind the Scenes Tours			Jenkins	5/29/2024
Jun	Submit	Press release for golf tournament			Jenkins	6/16/2024
Aug	Submit	Press release for back to school			Jenkins	8/12/2024
Aug	Pitch	Local news feature for back to school			Jenkins	8/12/2024
Oct	Submit	Press release for gala			Jenkins	10/5/2024

Donor Engagement Worksheets

Donor Engagement							
Inspire							
Social Media							
Facebook				YouTube			
Metric	Current	Goal	% Change	Metric	Current	Goal	% Change
Awareness	2000	2500	25%	Awareness	100	500	400%
Engagment	5	10	100%	Engagment	1	3	200%
Conversion	1	4	300%	Conversion	1	3	200%
Instagram				TikTok			
Metric	Current	Goal	% Change	Metric	Current	Goal	% Change
Awareness	500	750	50%	Awareness	5000	6000	20%
Engagment	1	4	300%	Engagment	10	15	50%
Conversion	1	2	100%	Conversion	1	3	200%
Month	Method	Activity			Responsible	Date	
Dec	Create	Social Media Calendar for Quarter 1 2024			Jenkins	12/4/2023	
Dec	Write	Write January social media posts			Jenkins	12/22/2023	
Dec	Schedule	Schedule January social media posts			Jenkins	12/23/2024	
Jan	Write	Write February social media posts			Jenkins	1/26/2024	
Jan	Schedule	Schedule February social media posts			Jenkins	1/27/2024	
Feb	Review	Review Jan SM analytics and update reports			Jenkins	2/1/2024	
Feb	Write	Write March social media posts			Jenkins	2/27/2024	
Feb	Schedule	Schedule March social media posts			Jenkins	2/28/2024	
Mar	Review	Review Feb SM analystics and update reports			Jenkins	3/1/2024	
Mar	Create	Social Media Calendar for Quarter 2 2024			Jenkins	3/15/2024	
Mar	Write	Write April social media posts			Jenkins	3/25/2024	
Mar	Schedule	Schedule April social media posts			Jenkins	3/26/2024	
Apr	Review	Review March SM analystics and update reports			Jenkins	4/1/2024	
Apr	Write	Write May social media posts			Jenkins	4/26/2024	
Apr	Schedule	Schedule May social media posts			Jenkins	4/27/2024	
May	Review	Review April SM analystics and update reports			Jenkins	5/1/2024	
May	Write	Write June social media posts			Jenkins	5/27/2024	
May	Schedule	Schedule June social media posts			Jenkins	5/28/2024	
May	Create	Social Media Calendar for Quarter 3 2024			Jenkins	6/15/2024	
June	Write	Write July social media posts			Jenkins	6/29/2024	
June	Schedule	Schedule July social media posts			Jenkins	6/30/2024	
July	Review	Review June SM analystics and update reports			Jenkins	7/1/2024	

Donor Engagement Worksheets

Donor Engagement					
Connect					
Month	Method	Activity	Responsible	Date	
Jan	Create	Create winter gala event page	Garcia	1/31/2024	
Mar	Research	Create summer programs event page with ops	Garcia	3/28/2024	
Apr	Create	Post new summer camp event sign up page	Garcia	4/26/2024	
May	Create	Post annual golf registration page	Garcia	5/19/2024	
Aug	Create	Create donation pages for Backpack Bonanza	Garcia	8/1/2024	
Aug	Create	Create fall volunteer opportunities page	Garcia	8/15/2024	
Donation Pages			Text Link	QR Code	Web Link
Backpack Bonanza					
Summer Crush			✓	✓	✓
Holiday Helping Hand					
Event Pages			Text Link	QR Code	Web Link
Winter Gala Event Page			✓	✓	✓
Summer Programs					
Golf Tournament					
5K Race					
Membership Pages			Text Link	QR Code	Web Link
Youth Memberships					
P2P Campaign Pages			Text Link	QR Code	Web Link
5K Race					
Volunteer Registration Pages			Text Link	QR Code	Web Link
Fall Mentoring & Tutoring					
Email List Sign Up			Text Link	QR Code	Web Link
Homepage widget			✓	✓	✓
Text List Sign Up			Text Link	QR Code	Web Link
Homepage widget			✓	✓	✓
Welcome Packages		Frequency	Responsible		
New Volunteers		Weekly	Parker		
New Donors		Weekly	Parker		
New Members		Quarterly	Andres		

Donor Engagement Worksheets

Donor Engagement					
Learn					
Surveys Sent	50	Frequency	Monthly	Response Rate	30%
Donor Research	10	Frequency	Quarterly		
Month	Method	Activity		Responsible	Date
Jan	Create	Create donor surveys		Mendez	1/17/2024
Feb	Email	Send first round of surveys		Mendez	2/15/2024
Mar	Analyze	Analyze first round of surveys to identify prospects		Wong & Mendez	3/4/2024
Mar	Email	Set up auto-action for new donor surveys		Mendez	4/4/2024
Apr	Review	Donor Research Report		Wong	4/23/2024
May	Review	Ensure all constituents have category		Mendez	5/11/2024
Jun	Interview	Interview volunteers - record in CRM		Klein	6/6/2024
Aug	Analyze	Review and report on new donor surveys		Wong & Mendez	8/18/2024
Sep	Review	Validate constituent relationships		Mendez	9/30/2024
Oct	Review	Donor Research Report		Wong	10/15/2024
Donor Engagement					
Engage					
Guest Writers	6	Volunteer Trainers	8		
P2P Team Leaders	20	Behind the scenes Tours	4		
Mentor 99 Society	50	Donor Cocktail Parties	3		
Month	Method	Activity		Responsible	Date
Jan	Research	Identify potential guest writers for newsletter		Jenkins	1/14/2024
Jan	Phone	Invite guest writers		Jenkins	1/31/2024
Feb	Research	Identify volunteer lead trainers		Klein	2/15/2024
Mar	Train	Train new volunteer lead trainers		Klein	3/20/2024
Mar	Research	Identify potential hosts for cocktail parties		Wong	3/29/2024
Apr	Schedule	Schedule cocktail parties		Wong	4/14/2024
May	Mail	Send invites for cocktail party 1		Jenkins	5/9/2024
Mar	Research	Identify potential P2P team leaders		Allreden	3/22/2024
May	Train	Train P2P team leaders		Allreden	5/9/2024
Aug	Schedule	Schedule BTS tours		Klein	8/26/2024
Aug	Post	Set up registration page for BTS tours		Klein	8/27/2024
Sep	Submit	Announce BTS tours in newsletter and press release		Jenkins	9/19/2024
Oct	Research	Investigate creating new Mentor 99 Society		Wong	10/20/2024

Donor Engagement Worksheets

Donor Engagement					
Invite					
Current recurring	17	Target recurring	50	Change	194%
Current Pledges	5	Target Pledges	15	Change	200%
Major Gift Proposals 23	4	Major Gift Proposals 24	10	Change	150%
Month	Method	Activity	Responsible	Date	
Feb	Research	Identify prospects for recurring gifts	Washington	2/2/2024	
Mar	Mail	Send invites for recurring gifts	Washington	3/3/2024	
May	Phone	Call to follow up for recurring gift invitations	Washington	5/12/2024	
Jul	Research	Identify prospects for multi-year pledges	Washington	7/20/2024	
Sep	Meet	Set up meetings for multi-pledges	Washington	9/10/2024	
Oct	Phone	Call to follow up for multi-year pledges	Washington	10/26/2024	
Donor Engagement					
Appreciate					
Month	Method	Activity	Responsible	Date	
Jan	Write	Establish acknowledgement procedure	Washington	1/29/2024	
Mar	Research	Investigate new donor wall options	Wong	3/3/2024	
Apr	Present	Present new donor wall options to Board of Dir	Wong	4/16/2024	
Apr	Create	Create schedule for stewardship meetings	Washington	4/29/2024	
Apr	Create	Create schedule for stewardship reports	Washington	4/30/2024	
May	Write	Write newsletter impact article	Washington	5/19/2024	
Jun	Present	Stewardship report for Board of Directors	Wong	6/16/2024	
Donor Engagement					
Motivate					
Month	Method	Activity	Responsible	Date	
Jun	Research	Identify potential two new board prospects	Board of D	6/2/2024	
Jul	Meet	Schedule interviews with board prospects	Board of D	7/19/2024	
Aug	Research	Identify gala hosts	Wong	8/8/2024	
Aug	Train	Train new board members	Burns	8/20/2024	
Oct	Research	Identify legacy giving prospects	Wong	10/1/2024	
Oct	Meet	Schedule meetings with legacy gift prospects	Wong	10/15/2024	
Nov	Present	Board report for legacy gifts	Wong	11/16/2024	
Dec	Research	Identify 2025 Annual Campaign Chairs	Wong	12/1/2024	