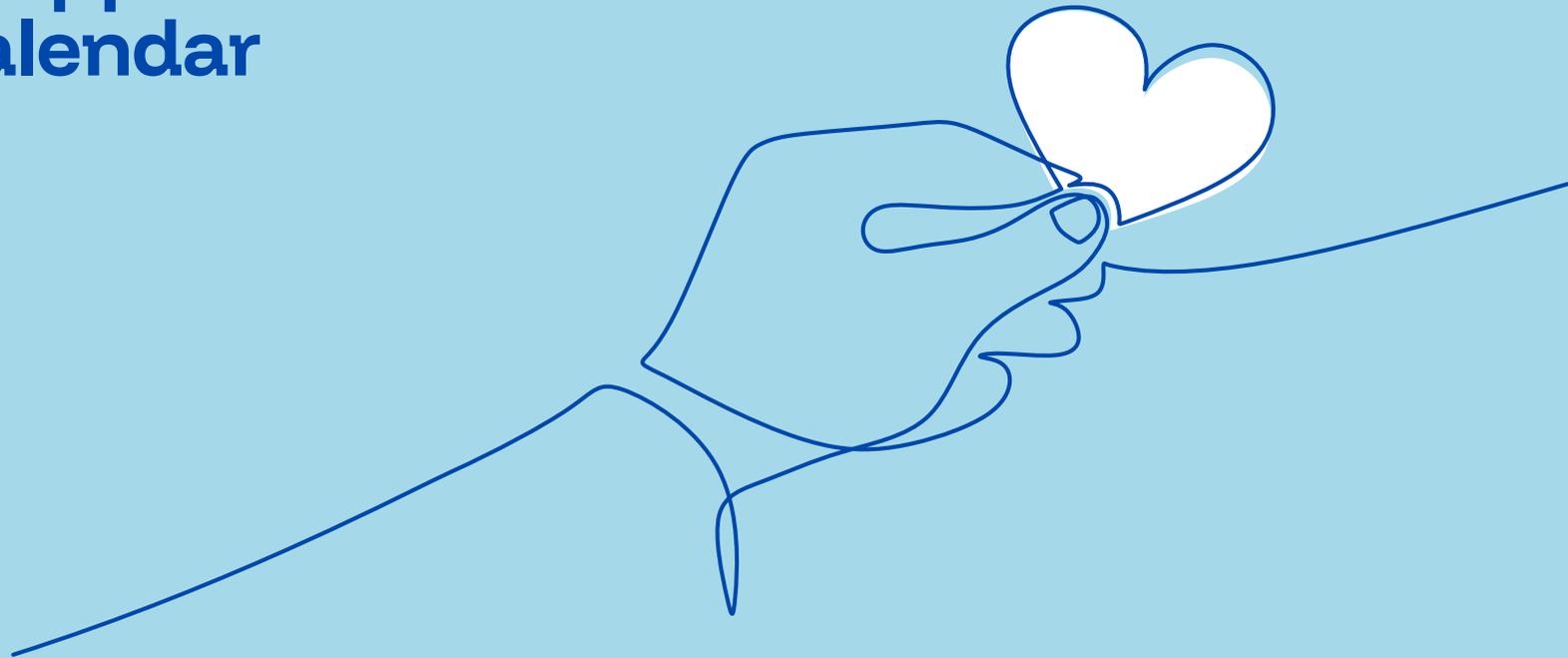


2026

Fundraising & Supporter Engagement Calendar



January

Donor Retention Reset

Gratitude, re-engagement, retention foundations.

January sets the tone for the entire fundraising year. It's the moment to lead with gratitude, reconnect with donors who supported you through year end, and re-establish clarity around your organisation's purpose and priorities for 2026. By focusing on donor retention early, such as, thanking supporters, updating stewardship systems, and sharing the vision for the year ahead, you strengthen trust, deepen relationships, and encourage donors to continue their support. This month is all about resetting, refreshing, and beginning the year with warmth, clarity, and intentionality.

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Ten focus areas to help you set the tone for January

1 Start the year with gratitude

Send personalised thank you messages to all donors, especially those who gave in November/December. Highlight a specific achievement they helped unlock.

2 Re-engage lapsed donors early

January is a "clean slate" month. A simple check-in email ("Here's what we're focusing on this year, can we count you in?") works extremely well.

3 Give donors a glimpse of the year ahead

Share 3 priorities for 2026. Donors love clarity and confidence.

4 Strengthen your donor journey

Review how donors move from first gift → second gift → deeper engagement. Identify where you're losing them.

5 Refresh your welcome sequence

Update automated acknowledgements, onboarding emails, and key messaging for the year ahead.

6 Segment your January outreach

Speak differently to:

- New donors
- Multi-year donors
- Regular (monthly) donors
- Volunteers who also give
- Lapsed donors
- Major donors
- Major donors, Trusts and Foundations who like to support matched giving

7 Invite donors into something 'new'

Launch a small initiative: donor briefing call, new newsletter, impact series, new case study.

8 Review donor data from 2025

Identify trends in retention, gift levels, giving patterns.

9 Equip your CEO

Provide them with donor thank you scripts, board talking points, and a 60-second "vision pitch" for meetings.

10 Celebrate internal wins

Recognise your team's fundraising efforts from the previous year and set culture goals for 2026.

February

Case for Support Tune-Ups

Clarity, confidence and core messaging.

February is all about sharpening the tools that matter most in fundraising: your Case for Support and your pitch materials. These assets are the backbone of every donor meeting, funder introduction, grant application, and strategic conversation. A strong Case for Support communicates clarity, conviction, and confidence, and it must evolve each year as your impact grows. By refreshing your key messages, updating impact stories, tightening your value proposition, and ensuring your pitch deck reflects your 2026 priorities, you equip your CEO and board to speak powerfully to funders all year long.

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Ten focus areas to help you set the tone for February

1 Refresh your “why now?” Statement
Funders want urgency and relevance. Make sure your 2026 Case for Support clearly articulates why your work is essential right now.

2 Update impact data & proof points
Replace 2024/2025 stats with the latest data. Prioritise numbers that show scale, need, traction, and effectiveness

3 Strengthen your value proposition
In one sentence: What difference do you make that no one else can?
This must be crisp, memorable, and funder-friendly.

4 Choose one anchor story
Feature a single powerful beneficiary or community story that emotionally grounds your case. Rotate annually.

5 Clarify your funding priorities
Spell out exactly what you want donors to fund in 2026:
• Programs
• Growth initiatives
• Capacity-building
• Multi-year commitments
Be specific.

“Your Case for Support is not a brochure, it’s a bridge. It connects a funder’s desire to do good with the most compelling version of your work. It should never sit still for more than a year.”

Catherine Brooks, Equitable Philanthropy

6 Ensure your theory of change is visible & simple
Funders love clarity. Make your Theory of Change digestible, visual, and linked directly to measurable outcomes.

7 Update your pitch deck
Refresh with:
• New photos
• Updated leadership details
• Current partnerships
• New awards or recognition
• Current strategic priorities
Make it tighter, cleaner, and more visual.

8 Add a ‘funder FAQs’ section
Address typical funder questions: sustainability, leadership capability, risks, evaluation methods.
It builds trust before they even ask.

9 Tailor messaging for different audiences
Create micro-versions of your pitch for:
• Major donors
• Trusts & foundations
• Corporates
• Government
• Community supporters
Same core story; different language and asks.

10 Equip your CEO with a one-page pitch
A simple, compelling “CEO cheat sheet” ensures messaging stays tight, consistent, and confident in every conversation.

March

Marketing & Communications Alignment

Messaging, storytelling, donor communications.

March is all about aligning your organisation's messaging so every communication; emails, newsletters, social posts, presentations, donor calls — tells a consistent, compelling story. Strong fundraising is rooted in strong storytelling, and this month is your chance to sharpen your narrative, clarify your organisational voice, and plan how you will communicate impact throughout the year. By aligning your marketing and fundraising messages now, you ensure donors hear a coherent story that builds trust, drives engagement, and inspires action.

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Ten focus areas to help you set the tone for March

1 Tighten your core narrative

Make sure your core organisational statement (the "who we are and why we exist") is clear, confident, and aligned with your 2026 strategy.

2 Update your key messages

Create three message pillars for 2026; one for impact, one for need, one for aspiration. Use these as anchors across all communications.

3 Refresh your donor-facing language

Avoid internal jargon. Simplify, humanise, and speak directly to donor motivations: impact, community, connection, purpose.

4 Select three impact stories for the year

Choose stories that represent your breadth of work. These can be used across newsletters, appeals, presentations, and donor meetings.

5 Create a 2026 communications calendar

Plan your messaging moments for the next 12 months; major events, milestones, awareness days, reports, donor updates, and campaigns.

6 Review your email strategy

Ensure your newsletters have a clear purpose: inform, inspire, convert, or steward. Check subject lines, calls to action, and open rates.

7 Align your social media with strategy

Pick two content themes to repeat: e.g., "impact in action," "behind the scenes," "client voices," or "CEO reflections."

8 Strengthen your visual identity

Ensure imagery, colours, and graphics reflect professionalism, warmth, and consistency. Replace dated visuals.

9 Rehearse your verbal pitch

Equip your CEO, board, and staff with a 60-second pitch they can use at events, meetings, and introductions. Same message, different voices.

10 Set up a quarterly messaging check in

Review communications every quarter to ensure alignment as programs, needs, and opportunities evolve throughout the year.

April

Prepare for Your EOFY Campaign

EOFY strategy, campaign build, donor engagement.

April is the ideal month to prepare for your End of Financial Year (EOFY) fundraising campaign. By getting ahead now, before the rush of May and June, organisations can create a clear campaign narrative, establish donor segments, gather impact stories, and line up all assets needed for a strong donation push. EOFY remains one of the most important giving periods in Australia, and early planning ensures your organisation enters the season confident, organised, and ready to maximise donor generosity. This month is all about building the foundation: the message, the story, the systems, and the plan.

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Ten focus areas to help you set the tone for April

1 Define your EOFY goal

Clarity drives action. Set a clear fundraising target and outline what success looks like beyond dollars (e.g., number of new donors, recurring giving upgrades).

2 Identify the campaign theme

Choose a unifying concept such as “Impact You Can Tax-Deduct”, “Fuel Our Next Chapter”, or “Change Before June 30”.

A strong theme helps anchor all messaging.

Top Tip: Consider a matched giving or capital campaign to help stand out from the crowd.

3 Choose one strong impact story

Highlight a beneficiary or community story that captures the heart of your work. This becomes the emotional centre of the campaign.

4 Segment your donor list early

Identify:

- Major donors
- Recurring donors
- Lapsed donors
- New donors
- Volunteers

Tailor your approach to each.

5 Draft your email sequence

Aim for 3–5 EOFY emails across late May and June. Draft now, refine later. Include: impact story, CEO note, urgency message, and final 48-hour push.

6 Prepare your donor thank you templates

EOFY donors expect fast, warm stewardship. Prepare acknowledgement templates, video scripts, and personalised thank you pathways.

7 Update your donation page

Small tweaks can increase conversions: shorter copy, EOFY messaging, clear tax-deductibility language, prominent “Donate Now” button. Set a target, add social proof, ensure that your campaign has traction before launch with some major gifts, donate yourself and ensure the donor journey is flawless.

8 Build your social media assets

Create 6–8 reusable tiles covering your theme, impact story, countdown messages, and donor gratitude.

9 Line up CEO & board involvement

Plan who will:

- Record video messages
- Make personal thank you calls
- Host a donor briefing

Leadership involvement elevates credibility.

10 Set your internal campaign timeline

Plot all milestones: email send dates, social posts, donor calls, board actions, and reporting deadlines.

Consistency = confidence.

May

Recurring Giving & Multi-Year Funding

Sustainable revenue, donor commitment, long-term relationships.

May is the ideal moment to shift from one-off giving to long-term supporter commitment. With your EOFY campaign about to launch, this month is about identifying which donors are ready to deepen their relationship — moving from single gifts to recurring donations or multi-year commitments. Recurring donors offer stability, predictability, and increased lifetime value. Multi-year funders provide strong organisational confidence. By strengthening these pathways now, you enhance sustainability and set your organisation up for stronger financial resilience.

“Recurring donors and multi-year funders are your organisation’s safety net. They’re telling you, ‘We believe in you over time.’ Your systems and stewardship should reflect how precious that is.” **Catherine Brooks,**
Equitable Philanthropy

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Ten focus areas to help you set the tone for May

1 Identify recurring donor prospects

Use recent engagement data to find donors who:

- Gave 2+ times in the last year
- Responded warmly to storytelling
- Attended events
- Upgraded gifts

These are your best recurring or multi-year candidates.

2 Tighten your monthly giving value proposition

Clarify what recurring donors enable: stability, continuity, and impact over time.

Give it a name if appropriate (e.g., “Changemakers Circle”).

3 Offer a simple upgrade pathway

Make it easy for donors to shift from one-off to monthly. A single, clear CTA can dramatically increase conversions. Create a dedicated donation page that focuses solely on your Monthly Giving program, and link to this in all your communications.

4 Develop multi-year funding options

Pitch two or three-year commitments with clear milestones and reporting expectations. Funders appreciate certainty and long-term planning.

5 Highlight the impact of consistency

Use real examples showing how reliable funding enables planning, staffing, and scaling. Show the power of predictability.

6 Introduce a recurring donor welcome journey

Prepare new members with:

- A warm welcome email
- A founder/CEO video
- Behind-the-scenes impact content

Recurring donors need special care.

7 Create EOFY-specific recurring giving messaging

Tie recurring giving to EOFY urgency (e.g., “Start your tax-deductible monthly gift before June 30”).

8 Ask major donors for multi-year support

Equip your CEO with a multi-year pitch:

- Long-term stability
- Strategic growth
- Reduced fundraising burden

Major donors respond to long-term vision.

9 Celebrate current recurring donors

Thank you notes and recognition go a long way in building loyalty and support. Just ensure approval before any public mention.

Top tip: National Volunteer Week (18–24 May) is a great moment to thank your volunteers.

10 Review your recurring giving tech settings

Ensure:

- Payments process smoothly
- Failed donations are flagged
- Renewal reminders are automated

This protects revenue and reduces churn.

June

Mid-Year Fundraising Foundations Review

KPIs, performance, strategy reset.

June is your strategic checkpoint. With the first half of the year behind you, this is the moment to pause, evaluate, and reset. A mid-year review helps organisations understand what's working, what's lagging, and what needs recalibrating to ensure the next six months drive stronger fundraising performance. By analysing KPIs, donor trends, staff capacity, and campaign effectiveness, leaders can make informed, intentional decisions that strengthen sustainability and increase readiness for the second half of the year — especially the critical fundraising period from September to December.

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1 Review your mid-year KPIs

Focus on:

- Donor retention rate
- Donor acquisition trends
- Average gift size
- Recurring donor growth
- Grant success rate
- Major donor activity

Identify what's trending up or down.

2 Assess progress against yearly targets

Are you halfway to your annual fundraising goal? If not: adjust expectations, reforecast, and plan targeted actions.

3 Evaluate your EOFY campaign performance

What has worked so far?

Which donors have engaged?

Use early EOFY trends to inform July outreach.

4 Revisit your donor segmentation

Check whether your donor segments still reflect actual behaviour. Update your lists for the remainder of the year.

5 Identify "at-risk" donors

Spot donors who gave last year but haven't yet given in 2026. Prepare a stewardship plan to re-engage them.

6 Analyse your communications consistency

Has messaging been clear, aligned, and regular?

If communications have slowed, reset and strengthen your rhythm for the second half of the year.

7 Conduct a major donor pipeline review

Identify:

- Who is closest to a gift
- Who needs a touchpoint, like a phone call from your CEO or Chair
- Who should be invited to a briefing or meeting

June is a strong cultivation month.

8 Realign team capacity & roles

Check workloads, bottlenecks, and inefficiencies.

Ask: Do we need to shift responsibilities, strengthen processes, or simplify anything before the busy fundraising season?

9 Prioritise quick wins

Choose 3 actions that can create immediate improvement (e.g., updating email templates, refreshing donor thank you scripts, or tightening messaging).

10 Set strategic focus for July–December

Define your top three priorities for the next six months.

Clarity now reduces overwhelm later.

"A mid-year review isn't about beating yourself up over targets. It's about getting honest, making smart adjustments, and giving your team permission to focus on what really works." **Catherine Brooks**, Equitable Philanthropy

July

Event Strategy Leadership Month

Intelligent event design, donor engagement, strategic experiences

July is an ideal time to focus on events, not by adding more to the calendar, but by designing smarter, more strategic experiences that genuinely deepen donor relationships. With EOFY complete and the second half of the year ahead, organisations can now shift into planning intimate, meaningful donor events that support cultivation and stewardship for the months to come. This month is about clarity: choosing the right events, ensuring they serve a fundraising purpose, and designing experiences that create strong emotional connection rather than logistical burden. Thoughtful events become touchpoints that warm donors ahead of Spring campaigns and year-end giving.

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Ten focus areas to help you set the tone for July

1 Choose events with a purpose

Every event must answer: *What is the fundraising or stewardship objective?*

Avoid events that drain resources without deepening relationships.

6 Use events to gather donor insights

Ask donors: *What inspires you? What do you want to learn more about?*

Events are a goldmine for qualitative understanding.

2 Prioritise small, high-impact gatherings

Intimate briefings, donor lunches, behind-the-scenes tours, and fireside chats outperform large galas for relationship-building.

7 Keep the event short & high-value

Respect donor time, keep the pace strong, and leave them wanting more.

3 Select your top 20 donors or prospects

Invite donors who:

- Need cultivation
- Are close to giving
- Have lapsed but remain warm
- Are major donor prospects

Quality > quantity.

8 Have a post-event follow-up plan

Within 48 hours:

- Send thank you emails
- Share key takeaways and photography
- Provide a next-step invitation (meeting, briefing, tour, volunteer opportunity, reminder to donate)

4 Create one signature experience

Plan one memorable moment; a personal story, a staff/CEO reflection, or an immersive experience that highlights your impact.

9 Document everything

Capture photos, quotes, donor reactions, and memorable moments.

These become assets for future campaigns, but always seek consent to share before publication.

5 Make your CEO the star storyteller

Prepare them with:

- A short pitch
- A compelling impact story
- A clear invitation to engage further

Strong leadership presence elevates donor trust.

10 Choose ONE concrete ask

Decide whether you want donors to:

- Book a meeting
- Join a donor circle
- Pledge a gift
- Attend a second event

Events without next steps lose impact, be intentional.

August

GivingTuesday Kickoff

Early campaign planning, community activation, donor engagement

GivingTuesday: 1 December 2026

August is the perfect month to begin planning for GivingTuesday, long before the year-end fundraising rush. GivingTuesday has become a global generosity movement and an increasingly important moment for Australian charities—giving visibility, momentum, and a sense of community-powered impact. By starting early, organisations can craft more thoughtful campaigns, secure supporter involvement, and line up storytelling, partnerships, and donor engagement activities that will make December 1 a powerful moment for your organisation. This month is all about designing a campaign that feels authentic, energising, and easy for your community to participate in.

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Ten focus areas to help you set the tone for August

1 Confirm your GivingTuesday goal early

Decide what success looks like: dollars raised, number of donors, new recurring givers, or social engagement.

Clarity now shapes the whole campaign.

2 Choose a simple, shareable campaign theme

A cohesive theme strengthens recognition and participation. Examples:

- “Give for Good”
- “Impact Starts Today”
- “1 Day. Big Change.”

3 Select one strong story or project

Anchor the campaign to a clear need or outcome.

Make it easy for donors to understand what their gift will do.

4 Engage your community early

Invite ambassadors, volunteers, staff, and partners to help amplify your message.

Your GivingTuesday team starts forming in August.

5 Plan a micro-event or activation

A morning tea, donor briefing, Q&A with your CEO, Instagram live, or impact mini-tour.

Small activations make the day more meaningful.

6 Draft your email & social media sequence

Prepare and schedule these now:

- Announcement
- Impact teaser
- Storytelling email
- Campaign day emails
- A thank you message

7 Build a “Campaign-in-a-box” for supporters

Provide graphics, sample posts, hashtags, and a 1-minute explainer so supporters can easily share the message on December 1.

8 Identify matching gift opportunities

Ask a major donor, partner, or board member to offer a match.

Matching = motivation.

9 Create a new donation page for a one-day push

Boosts conversions by ensuring:

- Clear GivingTuesday branding
- A strong headline
- Optional recurring gift promotion
- Clean mobile version

10 Clarify what happens after GivingTuesday

Plan your stewardship tactics now:

- Personal thank yous
- Impact follow-up
- Invitation to stay connected
- Recurring donor upgrade pathway

Your post-campaign actions matter just as much as the day itself.

“GivingTuesday works best when it’s not an isolated day but a chapter in a longer story you’re telling donors.

August is when you start writing that chapter.”

Catherine Brooks, Equitable Philanthropy

September

Year-End Fundraising Prep

Story, segmentation, campaign build, donor readiness

September is the month where year-end fundraising truly begins, **not with emails or appeals, but with preparation.** This is your strategic runway. By building your year-end narrative now, refining donor segments, gathering impact stories, and mapping out your communications timeline, you remove the pressure and panic that often hits in November. A strong September ensures your organisation enters the final quarter confident, organised, and ready to deliver a compelling donor experience. This month is all about thoughtful planning that will make your October–December efforts exponentially more effective.

“Rushed campaigns feel rushed to donors. When you do the thinking in September—segmentation, stories, timelines—you create a calm, confident experience in December.” **Jessica Macpherson, Blaze Your Trail**

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Ten focus areas to help you set the tone for September

1 Set your year-end fundraising goal

Clarify:

- Total amount you want to raise
- Number of donors to reach
- % increase from last year

The entire strategy flows from this.

2 Analyse last year's results

Identify what worked (or didn't) in 2025:

- Best-performing emails
- Donor segments with highest response
- Most compelling call to action

Learn, refine, repeat.

3 Choose your year-end campaign theme

Examples:

- “Finish the Year With Impact”
- “Hope for the Holidays”
- “Strengthen the Future”

The theme anchors all December storytelling.

4 Select three impact stories

Gather stories now, not in November:

- One emotional story
- One data-driven story
- One beneficiary or community voice

These become the heart of your campaign.

5 Segment your donor lists

Group donors strategically (and tailor your messaging accordingly):

- Major donors
- Recurring donors
- First-time donors
- Lapsed donors
- EOFY / EOCY donors
- Volunteers

6 Map out your year-end communications calendar

Plan October–December touchpoints:

- When emails will go out
- When social posts will run
- When CEO videos will be recorded
- When board outreach will happen

Clarity = calm.

7 Update your donation page for peak giving season

Optimise for: Clarity, Mobile experience, Strong calls to action, Recurring giving prompts.

Make giving effortless.

8 Design your major donor strategy

Identify major donor prospects and decide who will:

- Reach out
- Invite them to a briefing
- Make personal calls

This group can make or break December outcomes.

9 Plan your Stewardship pathway

Pre-draft thank you messages, CEO videos, and donor updates so you're ready for rapid response during December.

10 Prepare your board for year-end engagement

Give them scripts, donor lists, and suggested call templates. Board activation in Q4 amplifies results significantly.

October

Celebrate Community

Community engagement, supporter mapping, gratitude-in-action

October is the perfect month to pause, zoom out, and reflect on the incredible community that surrounds your organisation. It's a chance to recognise volunteers, donors, staff, board members, ambassadors, and partners who have supported you throughout the year. With the intensity of November and December approaching, this month provides a valuable window for authentic connection and gratitude. Celebrating your community now strengthens trust, warms up donor relationships, and creates emotional readiness for the year-end campaign. October is about nourishment, filling your organisation and supporters with appreciation, connection, and a reminder of why your mission matters.

TOP TIP: You should also be putting the final touches on your Annual Report at this stage.

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Ten focus areas to help you set the tone for October

1 Map your supporter ecosystem

List everyone who contributes to your mission: donors, volunteers, ambassadors, partners, staff, community leaders. Identify who needs touchpoints before year-end.

2 Highlight one community story

Share a story about someone working behind the scenes, such as a volunteer, program leader or ambassador, who brings your mission to life. Feature the story in your newsletter and on social media, and encourage your CEO and board to share it on LinkedIn.

3 Send a community gratitude message

A warm, simple thank you email or video from your CEO in October goes a long way in deepening connection before November.

4 Introduce a 'Supporter Spotlight'

Showcase one supporter each week on social media or in your newsletter. Celebrate their contribution, story, or impact.

5 Engage your board members, advisory council or key champions

Invite them to help refine messaging or preview your year-end plans. People support what they feel part of.

6 Host a brief online community touchpoint

A 15–20 minute Zoom with your CEO sharing updates, impact highlights, or behind-the-scenes insights.

Make your sessions short, warm & relational.

7 Equip your board for November–December

Provide scripts, donor names, and suggested talking points so they can make meaningful outreach during the giving season.

8 Capture testimonial quotes

Ask staff, volunteers, and beneficiaries for short quotes about their experiences.

These become powerful assets for year-end messaging.

TOP TIP: You can use surveys to obtain great testimonials about your work.

9 Encourage peer sharing

Invite supporters to share a social post about why they back your organisation.

Boosts visibility and creates social proof before fundraising season.

10 Celebrate internally too

Thank your staff and volunteers. Recognise achievements. Celebrate International Volunteer Day (5 December 2026).

Strong internal culture builds strong external generosity.

"Your community is bigger than your donor list. When you genuinely celebrate volunteers, staff, partners and lived-experience voices, fundraising becomes a natural next step, not an awkward ask." **Catherine Brooks, Equitable Philanthropy**

November

Corporate Partnerships Focus

Corporate partnerships, strategic engagement, mutual value

November is the ideal month to focus on corporate partnerships. As businesses prepare their own year-end reporting, budgets, CSR reviews, and planning cycles, they are more open to conversations about impact, collaboration, and strategic philanthropy. This is the moment to strengthen existing partnerships, pitch new ones, and position your organisation as a values-aligned, credible partner for 2027. Corporate partnerships work best when rooted in mutual benefit — combining a business’s desire for purpose and culture-building with your organisation’s mission, story, and expertise. November is about planting seeds for next year’s partnerships while also inviting current partners to support your year-end campaign.

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Ten focus areas to help you set the tone for November

1 Identify your top 10 corporate prospects

Look for businesses with aligned values, local presence, employee engagement interest, or leadership with philanthropic history.

2 Refresh your corporate partner pitch

Prepare a concise 1–2 page pitch highlighting:

- Your impact story
- Your core programs
- Synergies with business goals
- Clear partnership options

3 Build 3 signature partnership packages

Create clear, compelling calls to action that show corporates why partnering with you benefits them. Offer clarity, choice and visibility.

4 Review existing corporate relationships

Corporates often appreciate year-end alignment, identify which partners need:

- A gratitude touchpoint
- An impact update
- An invitation to support year-end appeal

5 Plan an end-of-year corporate briefing

A 20–30 minute online briefing with your CEO sharing impact highlights, new opportunities, and partnership visions for 2026.

6 Develop an employee engagement offer

Examples: Workplace giving, Lunch-and-learn sessions, Team volunteering, Skill-sharing opportunities. These deepen engagement beyond a financial gift.

7 Use storytelling that appeals to business values

Corporates respond well to alignment with their purpose so focus on outcomes such as:

- Social impact
- Community strengthening
- Mental health/support
- Social cohesion

8 Include corporates in your year-end campaign

Invite businesses to:

- Match donations
- Sponsor an appeal
- Share your campaign internally
- Promote your messaging to their networks

9 Equip your CEO with a corporate-specific pitch

Prepare a succinct narrative tailored to business audiences, clear ROI, alignment, and simplicity lead to better conversations.

10 Set partnership goals for 2026

Map your target industries, ideal partners, and values alignment. Define:

- Revenue goals
- Number of new partners
- Which programs need sponsorship

November is the perfect month to set intention.

“Good corporate partnerships start with a shared problem to solve, not a sponsorship package. When the alignment is real, the money—and the impact—follows.” **Catherine Brooks, Equitable Philanthropy**

December

Celebrate, Steward & Set Up Next Year

Year-end success, gratitude, strategic preparation for february

December is a powerful dual-focus month: celebrating generosity and preparing for the momentum you'll need when the sector returns in February. While supporters, funders, and partners begin to wind down for the holidays, this is your opportunity to finish the year strong and quietly set up the foundations for the year ahead. Many nonprofits lose January entirely; CEOs are away, boards are slow to meet, and funders aren't yet making decisions. Organisations that prepare in December hit February running with clarity, confidence, and ready-to-send materials. This month is about stewardship, reflection, and forward planning so your team enters 2027 organised and energised.

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14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Ten focus areas to help you set the tone for December

1 Steward donors quickly & warmly

Make thank you calls and send personalised messages, videos or updates within 48 hours of receiving a gift. Strong December stewardship boosts retention in the new year.

2 Celebrate your community

Thank your donors, board, volunteers, partners, and staff. A gratitude-rich December builds goodwill for February conversations.

3 Debrief with your team at year-end

- What worked?
- What didn't?
- Which systems or messages need refinement?

Document this now while memories are fresh.

4 Outline your 2027 case for support

Not a complete rewrite, just update:

- Key messages
- Impact stats
- Needs statements
- Priority programs for 2027

This becomes your February activation.

5 Draft your february outreach plan

Plan donor and funder touchpoints for early February before everyone logs off in December.

6 Pre-schedule January/February communications

Prepare:

- A warm "Welcome Back" message
 - February campaign emails
 - Early-year announcements
- January will take care of itself.

7 Update your donor segments for 2027

Identify:

- New donors
- Lapsed donors
- Recurring donors
- Major donor prospects

Ready-to-go lists = faster February action.

8 Line up early-year CEO touchpoints

Prepare scripts, talking points, and short videos your CEO can record before the break for use in Feb/March.

9 Create a 'Fundraising priorities for 2027' summary

Draft a one-page internal roadmap capturing your top 5 fundraising priorities for the new year. Give clarity to your board and leadership.

10 Celebrate internally & rest

Acknowledge your team's wins, host a moment of celebration, and set boundaries for rest. A restored team shows up powerfully in February.

"December is both a finish line and a starting line. Celebrate what's been achieved, then quietly set up February so you're not rebuilding momentum from scratch after the break." **Catherine Brooks, Equitable Philanthropy**

About the Partners Behind This Calendar

Equitable Philanthropy

Equitable Philanthropy is a specialist fundraising and philanthropy advisory working with charities, foundations, and purpose-driven organisations to build sustainable funding, stronger relationships, and long-term impact.

Led by **Catherine Brooks**, Equitable Philanthropy supports organisations at a strategic level; helping CEOs, boards, and senior leaders clarify their fundraising vision, strengthen their Case for Support, engage funders and partners, and design fundraising strategies that actually work in practice.

Equitable Philanthropy's work focuses on:

- Fundraising strategy and planning
- Case for Support and pitch development
- Major donors, trusts & foundations, and corporate partnerships
- Donor stewardship and relationship-building

- Board and CEO fundraising capability
- Fundraising readiness and due diligence

At its core, Equitable Philanthropy acts as a bridge, connecting funders with funder-ready organisations, and helping charities communicate their work with clarity, confidence, and credibility.

"Fundraising works best when it's grounded in strong relationships, clear strategy, and trust — not pressure or panic."

Catherine Brooks



Blaze Your Trail

Blaze Your Trail is a specialist consultancy helping charities make great fundraising strategies work, through effective, well-supported systems.

Founded by **Jessica Macpherson**, Blaze Your Trail partners with organisations to implement, optimise, and embed the tools and processes that underpin successful fundraising, with a particular focus on CRM systems and donor data.

Blaze Your Trail specialises in making systems work in practice, not just on paper.

What we do

- Blaze Your Trail supports charities with:
- CRM selection, implementation, and optimisation
- Donor data strategy, structure, and hygiene
- Fundraising systems and process design

- Fundraising operations, reporting, and insight
- Building team capability and confidence around systems and data
- Helping organisations actually use their CRM well

How we work

Great fundraising ideas fail when systems get in the way. Blaze Your Trail ensures that strategy is backed by practical, usable systems that support teams rather than overwhelm them — enabling organisations to work smarter, not harder.

"Good systems don't replace relationships — they protect them."

Jessica Macpherson



How We Work Together

Equitable Philanthropy and Blaze Your Trail are intentionally **complementary partners**.

- Equitable Philanthropy focuses on strategy, storytelling, relationships, and funder engagement.
- Blaze Your Trail focuses on systems, CRM, data, and operational foundations.

Together, we help organisations:

- Design strong fundraising strategies and **implement them effectively**
- Build compelling Cases for Support and **track donor relationships properly**
- Strengthen donor engagement through systems that support long-term stewardship
- Equip leaders with confidence and **give teams tools that genuinely work**

This calendar reflects our shared belief that successful fundraising sits at the intersection of **people, strategy, and systems** — and that organisations deserve support that honours all three.

Learn More

Equitable Philanthropy epadvisory.co

Blaze Your Trail blazeyourtrail.org

Together, we help organisations move from intention to impact; with clarity, confidence, and capability.

