



Empowering **Good** Businesses

[www.ap360marketing.com](http://www.ap360marketing.com)










# Supporter Engagement Audit Checklist

This checklist is designed for small charities with limited time and resources. Use it to plan supporter engagement across generations with minimal effort.




## Monthly Workflow

Each month, aim to complete these core supporter engagement tasks. Adjust as needed based on your campaign calendar or team availability.

- ☐  Export supporter data (e.g. donations, engagement) and scan for trends
- ☐  Send thank-you messages to new donors (email, card, or phone)
- ☐  Post 1-2 supporter stories or impact updates on social media
- ☐  Respond to enquiries and DMs (set a weekly check-in time)
- ☐  Send 1 email to a segmented group (e.g. lapsed donors, young givers)
- ☐  Film a quick behind-the-scenes video or campaign update
- ☐  Repurpose content across email, social and website (e.g. one supporter story = blog + Instagram + newsletter blurb)

## Lean Annual Content Calendar (Supporter Case Study Themes)

Plan your content based on key supporter stories. Spread the stories evenly to maintain variety and consistency.

- ☐  Bequests (2 stories): Share how two long-time supporters decided to leave a gift in their Will.
- ☐  PAFFs (1 story): Highlight a Payroll Giving supporter or workplace partner.
- ☐  Regular Givers (3 stories): Feature monthly givers who support ongoing impact.

- ☐ 🎁 Single Givers (4 stories): Share varied motivations from one-off donors.
- ☐ 🌱 Grassroots Supporters (3 stories): Showcase small fundraisers, volunteers or community advocates.
- ☐ 🎓 Young Donors (2 stories): Include stories from younger supporters, such as students or new grads.
- ☐ 👨👩👧 Family or Multigenerational Supporters (2 stories): Highlight intergenerational support (e.g. mother and daughter both give).

## **Tips for Staying on Track**

- ☐ Block 2 hours/month for 'content day' to create, schedule and review.
- ☐ Use free tools like Canva, Google Forms, Mailchimp, Meta Business Suite. • Reuse stories across platforms to save time.
- ☐ Ask volunteers or board members to help source supporter stories.
- ☐ Store everything in a shared folder with clear file names (e.g. 2025\_bequest\_margaret.jpg).

**Need help implementing this calendar or setting up your workflow?**  
**Get in touch via [ap360marketing.com](https://ap360marketing.com) — we'd love to support you.**



**Speak to Younger Supporters — Without Alienating Your Base**  
For NGOs with with lean teams