Donor Communications Review Process Builder

Part 1 | Map Your Current Review Process

Choose one communication your organization produces regularly. Map what actually happens today, not what is supposed to happen.

Communication to map:_____

Step	What Happens	Owner	Reviewer(s)/ Approval(s)	Typical Turnaround	Where does it get stuck?
1					
2					
3					
4					
5					
6					

Bottleneck Check

- ☐ Too many reviewers
- ☐ Unclear final decision-maker
- ☐ Multiple people reviewing the same thing
- ☐ Reviewers enter too late
- ☐ Feedback arrives in multiple places
- ☐ Conflicting feedback
- ☐ No defined review deadline
- ☐ Every communication gets the same level of scrutiny
- ☐ Last-minute requests derail planned work
- ☐ Leadership approval is required when it is not necessary
- ☐ Reviewers edit for preference rather than accuracy or strategy
- ☐ Other: _____

© 2026 Donor Relations Group. All rights reserved.

Name the two biggest bottlenecks:

1. _____

2. _____

What could we remove, combine, or clarify?

_____

_____

_____

Part 2 | Build Your Tiered Review System

Not every message needs the same review process. Define the level of review based on importance, visibility, sensitivity, and risk.

	Tier 1: Routine	Tier 2: Strategic	Tier 3: High Stakes
Definition	Low-risk, recurring communications	Messages with broader strategic importance	Sensitive, highly visible, reputational, legal, or executive communications
Examples	Routine emails, social media posts, reminder messages	Appeals, impact reports, campaign launches, key donor communications	Crisis communications, executive statements, sensitive announcements
Who drafts?			
Who reviews?			
Who gives final approval?			
Review window			

© 2026 Donor Relations Group. All rights reserved.

Sort Your Communications

TIER 1: ROUTINE | What can move quickly with minimal review?

_____

_____

TIER 2: STRATEGIC | What warrants additional review because of audience, purpose, visibility, or importance?

_____

_____

TIER 3: HIGH STAKES | What requires the highest level of review because of risk, sensitivity, visibility, or organizational impact?

_____

_____

Quick Tier Decision Guide

Ask	If YES	If NO
Does it involve sensitive, reputational, legal, crisis, or executive-level issues?	Tier 3	Continue ↓
Is it tied to a major campaign, fundraising ask, strategic initiative, key donor audience, or significant announcement?	Tier 2	Continue ↓
Is it routine, recurring, low-risk, and based on previously approved messaging?	Tier 1	Clarify before assigning a tier

© 2026 Donor Relations Group. All rights reserved.

Define What Reviewers are Reviewing For

Clear review lanes reduce duplicate edits, conflicting feedback, and rewrites based on personal preference.

Reviewer/Role	They are reviewing for…	They are NOT responsible for…
Subject-matter expert	Factual accuracy; names, titles, dates, numbers, statistics, program details, terminology	Rewriting for personal style; changing voice or messaging strategy
Communications	Grammar, spelling, punctuation, syntax; organizational style guide consistency; voice and tone; clarity; audience fit; message hierarchy and strategy	Re-litigating approved program decisions; changing verified facts without consulting the subject-matter expert
Leadership	Strategic alignment; organizational positioning; sensitive or reputational issues; executive-level decisions	Line editing, proofreading, or rewriting routine copy
Legal/Compliance	Legal, regulatory, privacy, accessibility, and compliance concerns	General stylistic preferences or rewriting for voice
Our role:		

Set the Rules of the Road

Where will all feedback be collected?

_____

Who resolves conflicting feedback?

_____

© 2026 Donor Relations Group. All rights reserved.

What happens if a reviewer misses the deadline?

_____

Who has final decision-making authority?

_____

What is considered approval?

_____

PART 3 | Build Your Communications Calendar

Start with strategy, then make room for requests. The goal is not to fill a calendar. It is to protect the messages that matter most.

Start With Your Strategic Priorities

Priority	Audience	Desired Action/Outcome	Timing
1			
2			
3			
4			
5			
6			

Quarterly Communications Calendar

Date	Audience	Message	Strategic Priority	Channel	Tier	Owner	Status

© 2026 Donor Relations Group. All rights reserved.

Before You Add a Reactive Request...

- ☐ Does this need to be communicated? What happens if we do not send it?
- ☐ Does it need to be communicated now? Is the deadline real or simply preferred?
- ☐ Does it need its own communication? Could it fit into something already planned?
- ☐ Who actually needs to receive it?
- ☐ What strategic communication could this displace?

PART 4 | Your New Communications Review Process

Use this page as the one-page summary you can take back to your team.

Review Tier	What belongs here?	Reviewed by	Approved by	Turnaround
Tier 1: Routine				
Tier 2: Strategic				
Tier 3: High Stakes				

All feedback will be collected in:

_____

The person responsible for resolving conflicting feedback is:

© 2026 Donor Relations Group. All rights reserved.

_____

Our communications calendar will be owned by:

_____

New requests will be evaluated based on:

_____

Three Changes We Will Make Immediately

STOP | What will we stop doing because it slows the process or adds little value?

_____

_____

START | What new practice will make the process clearer or faster?

_____

_____

CLARIFY | What role, rule, deadline, or decision needs to become explicit?

_____

_____

Our First Test

Which upcoming communication will you use to test this new process?

_____

What will you watch for to determine whether the new process worked?

_____

_____

© 2026 Donor Relations Group. All rights reserved.