



Donor Stewardship Plan Template

Transformational Donor Stewardship – Earning & Retaining Donors for Life!

There are many ways to recognize donors. Here are a few examples:

- Formal thank you letter
- Personal note from leadership, volunteer or client
- Birthdays, anniversaries, etc.
- Exclusive update report/letter from leadership
- Personal, spontaneous clipping/note from leadership (i.e., “I saw this article and thought of you”)
- Phone call from staff, volunteer, client or board member
- Invitations to exclusive events/behind the scenes opportunities
- Invitation to a special event
- Invitation to an annual donor recognition event
- Special mention in a program
- Donor “spotlight” in a newsletter
- Recognition of anniversary of their first gift
- Name recognition on website
- Listing with other donors in newsletter
- The creation of a mission-immersion experience (a day with program staff, a day-in-the-life of...)
- Client involvement in recognition (quotes, letters)
- Staff involvement in recognition
- An “issues” lunch; topic-driven (great for prospecting and “friendraising” too)
- Mission-based “wear” pins, shirts, magnets, etc.
- Inclusion in (or naming of) a giving society, donor club, etc.
- Award program
- Asked to speak or present to non-profit constituency (i.e., speaking to clients about finances; students about interviewing; other donors about why they support mission)
- *And many, many, more creative ones!*



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CONSULTANTS IN GIVING AND RECEIVING

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→ **SAMPLE PLAN**

The Essentials		Best Practice		High-Impact	
Threshold Giving: All donations		Threshold Giving: \$100 +		Threshold Giving: \$1000 +	
Action	Lead	Action	Lead	Action	Lead
Thank you letters within 1 business week	Staff	New donor “Welcome” packet	Staff	Invitation for tour and lunch	Executive Director
Newsletter inclusion	Staff	Phone call expressing gratitude (two weeks post-gift)	Member of the Board Development Committee	Personal note (one month post-gift) expressing gratitude	Board Chair
		Card created by client (sent 3 months post-gift)	Art program to create	Inclusion in XYZ Society (includes behind-the-scenes experience event)	Staff and board event

A few things to consider:

- Each threshold should include more “personal touches” and “mission immersion”
- Be sure to start slow ... make it manageable! You can always add more “touches” each year
- Don’t forget to include others --- volunteers, students, clients and board members --- this approach is meaningful to both the recipient and the giver
- Spread out “touches” don’t do everything at once ... your donors should be surprised to receive something from you 6 months after their gift (it will inspire them to give again)
- Be creative and innovative! Keep it simple, steward from the heart, with the resources you already have!

