

Transformational Donor Stewardship – Sample Plan

Earning & Retaining Donors for Life



Create your own nonprofit integrated stewardship program

Remember, the 2nd gift is more difficult and more important to earn than the first!

There are many ways to recognize a gift...

- 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
- Name recognition on website
- Listing with other donors in newsletter
- Participation in 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 topic-driven “issues” lunch (great for prospecting and friend-raising too)
- Mission-based “wear” pins, shirts, magnets, etc...
- Inclusion in (or naming of) a giving society, donor club, etc...
- Award program
- Opportunity to speak or present to nonprofit constituency (i.e., speaking to clients about finances, students about interviewing, other donors about why they support mission).
- *And many, many, others!*



alysterling.com



CONSULTANTS IN GIVING AND RECEIVING

Transformational Donor Stewardship – Sample Plan

Earning & Retaining Donors for Life

→ SAMPLE PLAN

The Essentials

Threshold Giving: All donations

Action	Lead
Thank you letters within one business week	Staff
Newsletter inclusion	Staff

Best Practice

Threshold Giving: \$100 +

Action	Lead
New donor “welcome” packet	Staff
Phone call expressing gratitude (two weeks post-gift)	Member of the board development committee
Card created by client (sent three months post-gift)	Art program to create

High-Impact

Threshold Giving: \$1000 +

Action	Lead
Invitation for tour and lunch	Executive director
Personal note (one month post-gift) expressing gratitude	Board chair
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 the giver and the receiver.
- Spread out “touches,” don’t do everything at once. Your donors should be surprised to receive something from you six 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.

Transformational Donor Stewardship – Sample Plan

Earning & Retaining Donors for Life

→ **YOUR PLAN** Organization Name: _____

The Essentials
Threshold Giving: \$

Action	Lead

Best Practice
Threshold Giving: \$

Action	Lead

High-Impact
Threshold Giving: \$

Action	Lead

Notes and resources needed: