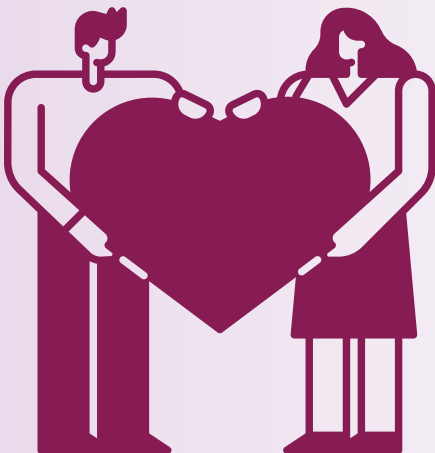


STEWARDSHIP

Fundraising is ultimately about relationships, and stewardship (or saying thanks) is one of the key ways to deepen relationships with donors and connect them to your organization. So you have a fundraising plan in place—you're almost set! There's one large missing piece: a stewardship plan.

Stewardship is a way to bring donors into your organization's inner circle, thanking them for their generosity and keeping them updated on how you are using their donations. The goal of stewardship is to deepen a donor's connection to your organization so they feel compelled to give in the future.



FIRST, SAY THANKS!

Make sure you acknowledge any gift made to your organization promptly —aim for no longer than three days after receipt.

Determine a level for handwritten notes—maybe donors of \$150+ receive a signed note card in the mail or personalized email sent from the Executive Director? Whatever you decide, build thanking donors into your workflow as if it is something as regular as that morning cup of coffee.

... NOW SAY IT AGAIN IN A VARIETY OF WAYS.

Once you've made the initial "thank you," continue to shine a spotlight on the solutions your loyal supporters have made possible.

That way, your prospective and loyal donors know just how much of a difference their generosity makes. Highlight donors in your newsletter, social media posts, on your website, or even on a banner at your next fundraising event. (Be sure to check with donors first to gauge whether or not they're comfortable with public recognition.) Don't forget about in-person options! Invite them on a tour of your facility or to a program-focused info session so they can connect more directly with your work.

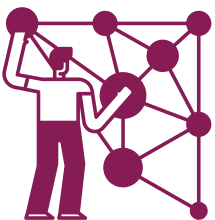
FINALLY, KEEP THEM CONNECTED.

Make sure that your donors receive regular updates and communications on the amazing work they've decided to fund. Some suggestions are:

Impact reports: Send a quarterly, bi-annual, or annual impact report that details the work of your programs.

Personalized touchpoints: Send a personal email to invite them to an event they might like. Mail a birthday card to major donors. Have a board member call them to check in. Forward them updates about a particular area of your organization's work they've shown interest in. Find ways to stay connected with folks. Ideally, you'll identify low-lift touch points that are easy to personalize and don't require you to reinvent the wheel or create new content.

Timely updates: Make sure donor email addresses have been added to your master email list so you can keep donors in the loop via eblasts.



SAMPLE STEWARDSHIP PLAN

JANUARY

Send out Impact Report detailing the work and stats of the previous year. Don't have the capacity to put together a full impact report? No problem! Put together a brief email update that includes hard stats and numbers as well as a few impact stories so folks have a sense of what you've been up to!

FEBRUARY

Valentine's Day touch—send an email “love letter” to your donors and broader community. This “love letter” can be a way to highlight and set the vision for your work in the year ahead.

MARCH

Opportunity for stewardship before a Spring Campaign. An example could be featuring a few donors and getting them to answer why they give to your organization.

APRIL

Spring Campaign April 1–30; focus on thanking donors promptly.

MAY

Thanking campaign donors again and sharing results via email.

JUNE

Donor happy hour event.

JULY

Mid-year update This doesn't need to be fancy! It can be a simple email update, a few posts on social media, or a full report (digital and/or hard copy), whatever makes sense for your organization and your capacity.

AUGUST

Donor survey—ask donors why they gave, what are the perks/benefits they care about (if any), and how they like to stay connected.

OCTOBER

Opportunity for stewardship before end-of-year campaign, such as a Thank-a-Thon:

- For donors of \$100+ and those who gave more than once during fiscal year.
- Can be personal emails or phone calls (depending on demographic).
- Board members can call/text people who they think will appreciate this kind of engagement
- If calls and texts aren't your thing, perhaps board members can help write a quick hand-written note.

NOVEMBER

“We're thankful for you” video that's emailed out to folks and/or posted on social media. This doesn't require sophisticated production value. It can be a quick, heart-felt thank you from your executive director or other folks from your organization.

DECEMBER

- Holiday greeting and thank you to all monthly donors and donors who gave during the calendar year.
- Small thank you gift to donors who give over a certain threshold. Again, this gift should be easy to mail and doesn't need to be expensive or complicated.

SOME THINGS TO KEEP IN MIND ...

CONSIDER POSTAGE

If you send a gift, make sure it's something that's easy and affordable to mail (e.g. it doesn't require you to spend a lot on packaging and shipping!).

KEEP IT SIMPLE!

Avoid creating new work and lean into existing communications and events. For example, you can send personalized invites, make a point to greet folks in person, pass on general updates with a personalized note, etc. Find ways to add a personal touch to your existing communications, events, and other programming.

FIND WAYS TO HIGHLIGHT YOUR WORK IN CREATIVE WAYS

Rather than focus on the traditional holidays, could you feature key milestones or dates related to your work? For example: if your organization works on labor rights, maybe you do a personalized thank you on Labor Day and May Day as a way to highlight your organization's connection to and impact on the labor movement. This helps in a few ways; it gets you in front of people on dates that aren't so competitive, it's less likely to get lost in the noise, and it helps build your unique voice as an organization.



THANK YOU LETTER TEMPLATE

[Salutation],

Thank you for your donation of [amount] to [Name of organization]! It really makes a difference for [insert benefiting cause/person/issue]

Thanks to you, [tell the donor about the impact, who they are helping, and what your organization is accomplishing].

[2–3 sentences providing more information about your organization, or a story or quote from someone who your organization has served].

Thank you again for your ongoing support!

Sincerely,

[Name]

IMPACT REPORT OUTLINE

An annual impact report is a showcase of what was accomplished with the funds an organization receives over the year. Donors want to know how their contributions helped to further your mission, and the impact report is a great place to highlight your hard work.

PAGE 1

Cover: Include logo, name, and year

PAGE 2

Letter From The Executive Director: Summarize the year, any accomplishments and challenges

PAGES 3–4

Program Updates: Showcase a program, provide updates and photos

PAGES 5–6

Program Updates: Showcase a program, provide updates and photos

PAGE 7

New Staff: Provide photos and short bios of any new staff members

PAGE 8

In the News: Highlight press coverage of your organization and include links to news articles

PAGE 9

List of Sponsors: Showcase logos of event sponsors and any grant funders

PAGE 10

About/Contact Info: Leadership list, social media handles, and website address