

How to Create a Step-by-Step Donor Stewardship Plan

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Our Back to School campaign continues with a lesson in donor retention. Nothing in a nonprofit organization happens without donors. Organizations that focus on building relationships with their donors understand the importance of donor stewardship. They're committed to creating a sense of partnership, showing appreciation, and giving donors confidence that your organization is using their gifts to make an impactful difference. While there are many different techniques that organizations can use to implement stewardship, those that succeed with stewardship have a plan to ensure it happens day-to-day. In this post, we'll share how to craft your own donor stewardship plan.

1) Identify Your Donor Levels

The first step in creating a stewardship plan is to identify different donor levels. These levels will serve as a framework that you'll build your plan around. While you value every gift that you receive, and show appreciation for each gift, it's important to recognize that you have only so many resources to dedicate to stewardship. Those who give regularly and significantly should be given more attention than those who only donate a small amount once. Building your stewardship program around different donor levels will also give you the ability to strategically move donors up to higher levels of engagement.

While you can get more granular in your donor categories, the following levels are a good place to start:

New Donors

Because these donors haven't yet built a relationship with your organization, they typically start with a small gift. Build trust with new donors and give them confidence that your organization is a capable partner in making the impact that they want to see in the world.

Loyal Donors

Loyal donors have developed trust in your organization and have been giving to your nonprofit regularly over time. While they give reliably, these donors are still giving small amounts. Cultivate them through increased engagement and watch their giving level increase.

Major Donors

Major donors are those who have chosen to partner with your organization at a high level. They're fully committed, and they need to be given attention to keep them engaged. Nurture these donors to give at an even higher level by further building the relationship.

2) Decide Which Stewardship Techniques To Use

You have myriad [stewardship methods](#) to choose from when creating your stewardship plan. Start by brainstorming techniques to use at each donor level. Think about techniques around acknowledgement, recognition, reporting, and cultivation.

Use these ideas to get started:

- Send a gift receipt immediately after receiving a gift.
- Personalize gift receipts to mention the specific project or program that the gift will impact.
- Focus thank yous on the donor and the difference that she or he hopes to make.
- Include quotes from the recipients and beneficiaries of programs and projects.

- Create giving societies with memberships and perks that will build a sense of community and offer recognition.
- Host creative donor appreciation events.
- Send articles and other information of interest to major donors.
- Create special volunteer opportunities for donors who want to get more involved in your organization.

Once you've created a list of ideas, start marking the ones that your organization could implement most easily and successfully. Make sure you have a selection of techniques for each donor level. Cull your ideas until you're confident that you've chosen the ones that will give you the biggest impact with your particular donor group.

3) Document Your Plan

After your brainstorming session and idea curation, you're ready to create your stewardship plan. The plan should be a living document that you'll change and improve as you get feedback and new ideas from donors.

Begin by considering stewardship from the perspective of the donor. What should each type of donor experience at each stage of the process? Next, craft processes, policies, and procedures that will ensure your ideas get implemented. How will your team carry out each step? What challenges will they face? Create a schedule that clearly outlines the specific points and timeframes of when each communication and experience will occur.

Communication is key to the stewardship process. Dedicate a section of your plan to detailing what your communications will look like and how they'll be sent. For example, what reports will you create? How many different versions will you need to produce? Where and when will you publish them? How will you share them with your donors?

Schedule a regular review process to take another look at your plan and gather feedback from your donors on how you can improve. Asking donors for feedback will allow you to continually make your stewardship program better and will also make your donors feel valued.

Download [How to Create a Donor Stewardship Program to Boost Retention](#) to learn more about how to use stewardship to grow donor relationships.