



## **Stewardship Three-year Strategic Plan Outline©**

*Stewardship is one of the most important components of a fund development program. Meaningful and quick thank you notes, transparency, measurable impact and outcomes are huge giving and volunteer motivators. The promise of outstanding stewardship results in many new gifts. The delivery on the promise by sharing the significance, impact, and joy of gifts of human, intellectual, network and financial capital results in donor retention and increased giving. Donors become “all in,” giving joyfully and generously.*

*Stewardship is universal. Be sure to include corporate leaders and their employees and foundation officers above and beyond what is “required.” Anonymous donors, wealth managers, heirs, staff members and of course, volunteers — they all will to great stewardship. Internal donors are important as well — senior team, faculty, physicians, program staff and so forth.*

*Your results will include increased donor and volunteer retention, increased leadership annual, major, and planned gifts, and spectacular viral marketing.*

*A three-year-timeframe gives you the space to assess, set goals, secure buy-in, get policies in place, try and test things, and adjust.*

### **Defining Stewardship**

The process of being responsible for transparent and appropriate promised uses of donors and volunteers’ investments of **time, talent, advice, networks, and funds**, and demonstrated appreciation for those investments. Strategic communications and experiences that connect donors and volunteers to the impact of their investments in meaningful and personal ways.

1. **Demonstrating** transparency, accountability, fiscal prudence, smart investments, and the use of gift dollars and volunteer personal capital\* as intended.
2. **Documenting** accurately decision-makers, their motivations, and intentions as well as the particulars of the gifts of money and personal capital.\*
3. **Thanking and recognizing** fairly, timely, and in ways that promise donors and volunteers impact and accountability.
4. **Welcoming new donors and volunteers and returning donors and volunteers** in timely, personal ways that promise the donors and volunteers impact and accountability.
5. **Delivering** high levels of customer service; “wowing” investors.
6. **Connecting** donors and volunteers (beyond thank you) to the impact of their philanthropic and personal capital\* investments in pleasing and creative ways using a wide array of tools, voices, mediums, and experiences.

**\*Personal Capital** includes human capital (e.g., life experiences, time, intrinsic competencies like empathy, worldview); intellectual capital (e.g., professional expertise, wisdom, talents, critical thinking); network or connector capital (e.g., professional, social, personal, religious); financial capital (e.g., personal giving capacity, access to other funding sources).

**Your plan should begin with vision and values that are aligned with the mission, vision, and values of the organization.**

### **Example of Stewardship Office Vision and Values**

*Our country and community both benefit mightily from the philanthropy, guidance and volunteering of individuals, private and family foundation members, and corporate leaders and their employees. Philanthropy provides for those who are most vulnerable, helps cure dreaded diseases, deepens our faith, values, and assists our communities in solving vexing and important problems.*

*Our organization does all of this and more.*

*Donors and volunteers, however, want concrete demonstrations of our success, the difference we make in the world, our societal impact. They desire experiential proof, not just words in a stewardship report or a thank you card from the CEO.*

*To continue to inspire philanthropy and productive and meaningful engagement by our donors and volunteers, individuals and institutional donors who give or could give to many organizations, we intend to share the significance of every gift and volunteer investment of personal capital with every investor to our organization. In addition, we intend to help our investors experience the impact and joy of their gifts of time, talent, advice, access, influence, and money in creative and compelling ways. And finally, we intend to provide tailored, highly personal interaction between our most important donors and volunteers and our mission staff, beneficiaries, and community partners.*

**Sample Values:** *Integrity, Transparency, Accountability, Customer service, Sharing joy and impact, Creativity, Being donor-focused, Culture of Philanthropy (define each value)*

### **Sample Overarching Stewardship Goals**

1. To increase the satisfaction and joy of donors, volunteer fundraisers and other volunteers by providing appropriate, fair, creative stewardship to 100% of our donors, volunteer fundraisers and other volunteers including staff donors (by date)  
Note: (This is a measurable goal via donor satisfaction surveys)
2. To provide annually tailored and personalized “high touch” stewardship, based on personal philanthropic values and motivation and organizational interests, to our most important donors and volunteer leaders (by date)  
Note: (For this goal to be measured you must have direct knowledge of the values, motivations, and interests of your top donors and volunteers.)
3. To create a donor-centered and customer-centered culture throughout the organization, thus ensuring every volunteer, fundraiser, and donor feel valued and appreciated and every staff member feels the same. To achieve this culture (by date).  
Note: (To measure this goal, you must first assess the current culture and then re-assess each year until you achieve your goal)

4. To ensure every member of the fundraising team regards stewardship and valuing of donors and volunteers as part of their portfolio regardless of their primary responsibilities. To achieve this goal (by date).  
Note: (This must come from the CEO. When there is a culture of philanthropy within the organization, all senior staff and their teams understand, believe in, and act on their roles in philanthropy. For example, providing stories and data, willingness to go on calls, identifying potential donors, and so forth. If it is a favor to the development office, the culture doesn't exist.)
5. To honor and celebrate donor loyalty for all size gifts on an annual basis beginning (date)\*
6. To increase the retention rate of leadership annual (or middle donors) (\$1,000+) and major gift donors (\$50,000+)\*  
For new donors from x to y (by date)  
For donors giving from two to four consecutive years from x to y (by date)  
For donors giving for five or more consecutive years from x to y (by date)
7. To increase the retention rate of leadership annual and major gift volunteers  
For new volunteers from x to y (by date)\*  
For volunteers from two to four consecutive years from x to y (by date)  
For volunteers for five or more consecutive years from x to y (by date)
8. To increase the retention rate of donors giving less than \$1,000\*  
For new donors from x to y (by date)  
For donors giving for 2 to 4 years from x to y (by date)  
For donors giving 5 or more years from x to y (by date)
9. To increase the number of donors who give more than they have in the past from x to y (by date)\*
10. To increase the number of volunteer fundraisers who raise more than they have in the past from x to y (by date)\*
11. To increase the number of rated donors who can give or are giving \$1,000 or more a year by documenting donor motivation and decision-maker information in the system from x to y (by date)\*

**\*Note: Goals 5 to 11 are shared goals with frontline fundraisers. Stewardship alone cannot achieve these goals. Stewardship + Engagement and Solicitation can.**

### **Sample Specific Stewardship Objectives**

#### **1. Assess our current stewardship program by:**

- Conducting an internal self-assessment using a recognized assessment tool or conducting an internal assessment using outside counsel\*
- Reviewing donor retention rates and upgrades rates to establish baseline information.

- Conducting an external assessment by interviewing a group of donors and volunteers representing every type of investment to a variety of programs at all giving levels; Surveying (or reviewing) donor satisfaction to establish baseline information.
  - Analyzing the data and using the information to inform the creation of a stewardship plan, program, and calendar.
  - Reviewing all past and current stewardship events, experiences, reports, templates and plans for effectiveness (increased donor satisfaction, engagement, volunteering and giving), alignment with vision and values, and costs.
  - Reviewing policies and procedures; identifying those policies and procedures that are in keeping with the vision; identifying those that are obstacles to growth and change.
  - Completing this task by (date)
- 2. Organize past donor giving and volunteer fundraising information by:**
- Identifying and recording all named spaces and equipment
  - Identifying and recording all endowed funds and legacy promises
  - Name-by-name giving by source, size, and purpose for gifts of \$1,000 plus and donors rated \$50,000 plus
  - Completing this task by (date)
- 3. Establish concrete, measurable goals for each of the important components of stewardship understanding that one of those components — managing the money prudently — is not usually in the hands of the stewardship team.**
- See definition above.
  - Use assessment as a guide.
  - Complete this task by (date)
- 4. Develop documentation tools and standard that include donor intentions for gifts of a certain size (for all purposes, not just endowment or restricted gifts).**
- Seek and secure agreement to use these tools consistently throughout the organization.
  - Complete this task by (date)
- 5. Thank every donor with an acknowledgment and/or gift receipt that meets tax deduction requirements within 48 to 72 hours of receipt. Thank every donor in targeted population with a personal phone call within 48 to 72 hours (new donors, donors giving at a certain level, donors who upgrade, etc.)**
- Determine current turn-around times by (date)
  - Streamline process by (date)
  - Keep acknowledgment messages fresh, restating the “promise;” update messages every (timeframe)
  - Call (what donors and volunteers at what levels) (who will call) to say thank you within 48 to 72 hours.
  - Track turn-around times, results of called donors.
- 6. Thank every volunteer with a personal note and/or phone call within 48 to 72 hours.**

- Identify volunteers throughout the organization including those who do not fall within the development office (or foundation) by (date)
  - Determine the percentage of giving and fundraising results of each cohort of volunteers by (date)
  - Determine the percentage of giving at leadership annual giving levels for each cohort of volunteers by (date)
  - Track going forward once you implement thank you and stewardship steps starting (date)
- 7. Implement a new donor and returning donor and new volunteer and returning volunteer welcome or welcome back program that consists of a phone call, welcome package and first six-months stewardship initiatives.**
- Welcome phone call, ask questions about giving/volunteering inspiration at this time, who else to thank, best method for connecting, email and cell phone numbers, “Please look out for our welcome package.”
  - Welcome package follows.
  - Follow-up phone call with more questions, invitation to something (from visit the website, to an event in the area, to come back for a tour)
  - Send Impact communication (video, letter, visit, photo)
  - All before the next solicitation and within six months of first gift receipt (we lose new donors early in their relationship)
- 8. Establish guidelines for recognizing gifts by level and purpose that are consistent throughout the organization. Make sure this is consistent with giving and naming opportunities.**
- Ensure that endowment gifts of certain levels and unrestricted gifts of the same level have equivalent stewardship.
  - Ensure that no naming opportunities compete with annual giving opportunities. For example, one can’t have a named fund for \$10,000. This competes directly with leadership annual giving.
  - Develop an annual leadership giving society for all unrestricted, repeatable gifts of \$1,000 to \$49,999+ no matter the source (special events, in-kind, outright)
    - i. Assign **impact statements** to each leadership level – gifts at this level help us achieve... (not a list of benefits like backstage tickets unless they are coupled with impact statements)
  - Establish consistency throughout the organization.
  - Complete this task by (date)
- 9. Create a matrix of baseline stewardship delivery for each type of gift, each giving level and each type of volunteer activity – what happens three months, six months after the thank you and again at the end of the year?\***
- What impact videos, written reports, notes, letters, pictures, podcasts, visits experiences, or events will each receive and when?
  - Complete this task by (date)
  - Create a calendar so that all internal stakeholders know exactly when each of these baseline stewardship initiatives will take place by (date)

- Measure the effectiveness of these initiatives — which resulted in the most increased giving, or deeper engagement. Base your measures on your goals.

**10. Plan and implement stewardship events and mission experiences that connect the most important donors directly to recipients (beneficiaries and their families, mission staff, the CEO) and that send clear Think, Feel, Do messages**

- Include follow-up for those who do not attend or participate.
- Include virtual and online events and experiences.
- Include Zoom or similar conversations between donors and beneficiaries, mission staff, CEO for those who cannot attend or in addition.
- Measure the effectiveness of these initiatives — which resulted in the most increased giving, or deeper engagement. Base your measures on your goals.

**11. Ensure personalized, high-touch stewardship is a component of every major and principal gift donor plan (moves engagement strategy)**

- Donor relations (stewardship) professional(s) participates in donor strategy meetings.
- Provide creative, tailored stewardship for top donors and volunteers.
- Keep offerings fresh, vary voices and mediums.
- Ensure that gift officers uncover donor preferences and are thinking about “Wow” opportunities.
  - i. Track the percentage of rated donors and potential donors and fundraising volunteers have personal motivation and decision-maker information in the donor management system.
  - ii. Track the effectiveness (engagement scores) of stewardship events and experiences in terms of outcomes (retention, upgrades, and satisfaction)

**12. Secure agreement and develop a strategy for customer service throughout the organization\***

- Define it, make it part of everyone’s responsibility, hold everyone accountable, measure, reward and celebrate\*
- Complete this task by (date)

**13. Evaluate and re-assess the program every year.\***

- Develop metrics for evaluating outcomes by (date)
- Measure against self-assessment tool annually
- Measure against progress against goals annually
- Conduct donor satisfaction survey every (x years)\*\*
- Re-tool the plan every (x)

**14. Provide staff, mission staff, board members and volunteer training in the uses and power of stewardship\* and customer service.**

- Educate and celebrate.
- Set-up a calendar of training offerings in person and online by (date)

**15. Involve beneficiaries, mission and senior staff and volunteers in the stewardship program.**

**Example of Action Plan to Achieve Objectives**

<b>Objective</b>	<b>Action</b>	<b>Notes</b>	<b>Date</b>	<b>RASCI</b>	<b>Budget Implications</b>
<b>Thank every volunteer with a personal note and/or phone call within 48 to 72 hours</b>	Identify volunteers throughout the organization including those who do not fall within the development office	Volunteers who raise money from golf, gala, LG, etc.  Volunteers who provide personal capital in other ways	By 1/15/22	<b>Responsible</b> (name) <b>Accountable</b> (name) <b>Support</b> (names) <b>Consulted</b> (names) <b>Informed</b> (names)	
	Determine the percentage of giving and fund raising of each cohort of volunteers	Create a matrix	1/31/22		
	Track going forward once thank you and stewardship steps implemented	Six months One year Annually after that	6/30/21 1/31/22 1/31/23-26		

The Osborne Group, Inc. conducts stewardship audits, helps create outstanding stewardship plans and has a plethora of stewardship tools and templates. We are master trainers. A Donor Accountability and Satisfaction Survey is an excellent step in assessing your current state. We are specialists in opinion research and can help you “hear” your donors.

If you would like to learn more about stewardship or any aspect of fund development, contact us at [mail@theosbornegroup.com](mailto:mail@theosbornegroup.com) or call us at 914-428-7777. Visit us at [www.theosbornegroup.com](http://www.theosbornegroup.com) for free tools, podcasts, videos, and blog posts. Follow us on LinkedIn. Like us on Facebook.

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