**39. Sample Stewardship Plan**

**NOTE: Not every section will apply to every organisation.**

[Organisation’s Name]

**Stewardship Plan**

**20xx –– 20xx**

**Prepared by:**

**Rank:**

**Date**:

Table of Contents

[33. Sample Stewardship Plan 1](#_Toc154569467)

[Goal 1: Acknowledgement 4](#_Toc154569468)

[Goal 2: Recognition 4](#_Toc154569469)

[Goal 3: Stewardship for Everyone 5](#_Toc154569470)

[Goal 4: Stewardship for the Critical Few 6](#_Toc154569471)

[Goal 5: Creating A Stewardship Culture 7](#_Toc154569472)

[Benefactor Levels 8](#_Toc154569473)

[Centennials 8](#_Toc154569474)

[Top 100 8](#_Toc154569475)

[Zeal 8](#_Toc154569476)

[Special Memberships and Stewardship Programmes 8](#_Toc154569477)

[The Chairperson/Chancellor’s Circle 8](#_Toc154569478)

[Legacy Society 9](#_Toc154569479)

[[Where applicable] Alumni Association 9](#_Toc154569480)

[Annual Fund/ Recurrent Income 9](#_Toc154569481)

[Leadership Fund 9](#_Toc154569482)

[[WHERE APPLICABLE] 'GRADitude Fund' 10](#_Toc154569483)

[Sponsorship and CSI 10](#_Toc154569484)

**Vision Statement**

The Donor Stewardship programme will ensure a comprehensive and quality programme of stewardship, which cultivates, engages, and recognises all donors and prospective donors to further the efforts of external support. This will be accomplished by developing ongoing relationships and partnerships with through timely and appropriate donor acknowledgement, recognition, and communication about the importance of their contribution(s).

**Mission Statement**

Central to the mission of the XXX, has always been a commitment to long-term relationships with our donors and the understanding that exceptional courtesy and stewardship is essential to our success.

Building on this distinctive legacy, the XX values stewardship practices that are rooted in authentic relationships where donors know the impact of their donations and recognise their essential role in the life and destiny of the organisation/institution.

**Defining Stewardship**

We understand stewardship to be the conducting, supervising, or managing of something; especially the careful and responsible management of something entrusted to one's care. The fund development staff commits to be fully responsible for developing long lasting relationships with our donors. We intend to maintain three key elements of stewardship with each of our donors:

* acknowledgement,
* recognition and
* reporting of donor activity.

**Guiding Principles**

1. To maintain the highest degree of courtesy in our contacts with donors.
2. To steward the resources entrusted to our care.
3. To communicate openly, frequently, and honestly with our donors.
4. To honour the privacy of our donors and friends.
5. To value diversity in all its forms and respect the dignity of the individual.
6. To ensure we meet both the letter and the spirit of the values and ethical code that govern our work.
7. To promptly provide each donor who qualifies, with a tax concession certificate [for those organisations that are registered and approved to issue such certification].

**Implementation**

The Stewardship manager will in consultation with the Director of Fund Development, implement the Stewardship Plan.

This plan will complement the Marketing, Communication, Fund development, and Alumni Relations.

Fund development will pursue the following Stewardship Goals:

## Goal 1: Acknowledgement

Thank every donor **within** 32 business hours (4 business days), including a “promise to comply", and an invitation to discuss further.

| Actions to Achieve | Person Responsible | By Date | Status |
| --- | --- | --- | --- |
| Ensure receipt is properly & fully processed and tax concession is issued (where applicable). | Manager | Not later than 32 hours | Tentatively in place |
| Draft various donor acknowledgement letter texts & load onto database (1st gift, 2nd gift, & for various amounts, etc.). | Manager | Drafts should exist on database | 3+ letter texts loaded |
| Draw letter from database. | Stewardship Officer /Manager | Not later than 32 business hours | Activated |
| OR Draft personalised acknowledgement letter. | Manager | Not later than 24 hours | When needed |
| Designate Senior Administrator/Personal assistant to dispatch. | Manager | Not later than 32 hours | When needed |
| Monitor weekly turnaround toward report monthly dashboard. | Manager | Each Friday | Ready |
| Add thank you phone call (top donors get call from CEO/VC). | Director Fund development | Alert CEO/VC office & schedule | When appropriate |
| Create a ‘new donor’ package with XXX info, ways to participate, etc. | Marketing | As needed | Have on hand and update regularly |

## Goal 2: Recognition

Provide appropriate, desired recognition of every donor to every fund that provides satisfaction to the donor and is likely to inspire potential donors.

| Actions to Achieve | Person Responsible | By Date | Evidence |
| --- | --- | --- | --- |
| Ensure accuracy of donor data collection. | Database Administrator | Per day | Database entries |
| Create donor listing, including a ​message of fiscal accountability (financial protocols). | Database Administrator | Annually / semi / quarterly | Annual Report |
| Identify opportunities for permanent recognition at vents, special occasions, etc. | Manager | When appropriate | Donor wall, plaque, citation |
| Order appropriate awards, books, blog, multi- media. | Manager | When appropriate | Have on hand |
| Invitation to high-level events when appropriate. | Manager | When appropriate |  |
| Implement recognition of donors at fundraising events. | Manager | Per event |  |
| Send follow-up recognition to event donors who indicate they are unable to attend. | Manager | When appropriate | Database note |
| Add special acknowledging note on donor report for top donors who attended? | Manager | Ongoing? | Database note |
| Consider a polite enquiring call or note to invitees who RSVP-ed, but did not attend. | FD Staff | Within a week of event. | Database note |
| From the Events’ Calendar, develop a list of photo opportunities at events – for newsletter articles, blog posts, etc. and where warranted, send framed copy to donor. | Marketing | Schedule from Events’ Calendar | Hard copies on file & note on database |
| Designate management committee member or senior executive to contact major donors, extending extra invitations to some gala event | Manager | Ongoing | Database note |

## Goal 3: Stewardship for Everyone

To increase the satisfaction and joy of donors by providing outstanding stewardship to every donor.

| Actions to Achieve | Person Responsible | Measure | Evidence |
| --- | --- | --- | --- |
| Capture contact details & focus areas for every prospective donor & donor agency. | Prospect researcher | Min xx records daily | > xx Monthly in Dashboard |
| Capture names, addresses and email for every donor. | Database Administrator | Per receipt | Database |
| Identify one impact story to feature, interview & take photos. | Marketing | By when? | Blog/newsletter / media |
| Deliver one email stewardship “postcard” on newsworthy item(s) to each donor. | Manager | Ongoing | Database |
| Mail stewardship letter to each donor ​(if no email address). | Manager | Ongoing | Database |
| Describe the impact of giving in each suitable newsletter & blog story. Hhow many? When posted? | Marketing | Ongoing | Publication & Database |
| Identify and “script” at least one person to deliver stewardship message ​at each event e.g. events. | Manager | Ongoing | Database |
| Add a second or third “stewardship only” communication to each donor - if reasonable. | Manager | Ongoing | Database |
| Consider designing a “thank-a-thon” with project staff, HoDs, & Executives, etc. | Manager | Annually |  |
| Design and send a “donor satisfaction survey” to all donors, phone follow-up to all who return, or all giving over R100,000 by using a database, Survey Monkey, or similar system. | Manager | Ongoing |  |

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## Goal 4: Stewardship for the Critical Few

To provide tailored and personalised “high touch” stewardship, based on personal philanthropic values, motivation, and institutional interests, to our most important donors.

| Actions to Achieve | Person Responsible | By Date | Status |
| --- | --- | --- | --- |
| Establish a stewardship management panel of the fund development evaluation committee to help plan and implement stewardship strategies. | Director | Semi-annually |  |
| Identify the of extent leadership donors, link to education & training, profession, etc. | Alumni Relations | Ongoing? |  |
| Design and implement one additional stewardship piece ​for donors over R100,000. | Manager | Ongoing? |  |
| Make personal visits (by staff, CEO or Board) to an exceptionally high-level donor to share the impact of their gift personally. | Manager/ Project Leaders | As appropriate |  |
| ​Conduct a “donor satisfaction survey” with each donor, preferably face-to-face to identify reasons & context(s), expectations, etc. for giving. | Manager | Once in each Semester |  |
| Plan delivery of personal stewardship message, from the VC, Manco, or Development team to top donors at each event. | Manager | Ongoing |  |
| Create separate recognition/stewardship event (s) for top donors. | Manager/ Events Officer | Once in each Semester |  |
| Create photo albums, flash drives / digital photo frames of visits or other interactions with each top donor. | Marketing | Quarterly |  |
| Send a monthly “insiders” letter/blog to all top donors from the VC. | Manager | Monthly |  |

## Goal 5: Creating A Stewardship Culture

To create a donor-centred and staff-centred culture throughout the institution/organisation, ensuring that every donor and potential donor feels valued and appreciated and every staff member feels valued.

To ensure that every member of the institution/organisation regards donor stewardship and valuing both donors and potential donors as part of their portfolio, regardless of their primary responsibilities.

| Actions to Achieve | Person Responsible | By Date | Status |
| --- | --- | --- | --- |
| Deliver at least one stewardship message ​to all staff members, annually. | Manager | January and/or December |  |
| Attend/organise all meetings where ​stewardship is discussed. Speak to specific experiences the Stewardship team had. | Manager | On-going |  |
| Identify a few staff “opinion leaders” to help share ​your message of the power of giving. | Manager | May/ August |  |
| Include non-fundraising staff in fundraising activities or events with specific, limited roles with donors. | Director | Ongoing |  |

**Lifetime Donor Recognition Privileges**

The *Lifetime Donor Recognition* category aims at increasing the recognition and involvement of your most generous donors who have earned the philanthropic leaders’ status at XXX. Their gifts have made a tremendous impact on the organisation, and on your mission.

## Benefactor Levels

Centennials **-** *Truth, fact, accuracy, and honesty*

1. Annual invitation to the Chancellor/Chair’s Gala Dinner.
2. Recognition in the Annual Chancellor/Chair’s Gala Dinner Programme for lifetime gifts totalling over **R1,000,000.**
3. Yearly special recognition in the organisation/institute’s annual report.
4. Recognition in the organisation/institution’s publications and website.
5. Prominent donor name recognition on a major-donor wall.

Top 100 - *Integrity, soundness, and charity*

1. Annual invitation to the Chancellor/Chair’s Gala Dinner.
2. Recognition in the Donor Gala Programme as lifetime gifts of **R500,000** and above.
3. Special recognition in the annual report.
4. Recognition in the organisation/institute’s publications and website.
5. Prominent donor name recognition on the major-donor wall.

Zeal - *Charity, love, affection, esteem, favour, dearness*

1. Annual invitation to the Chair/Chancellor’s Gala Dinner.
2. Recognition in the Donor Gala Programme as lifetime gifts between **R100,000 - R499,000,**
3. Special recognition in the organisation/institute’s annual report.
4. Recognition in the organisation/institute’s publications and website.
5. Prominent donor name recognition on the major-donor wall.

## Special Memberships and Stewardship Programmes

## The Chairperson/Chancellor’s Circle

The Chairperson/Chancellor’s Circle is a special organisation to ensure members have a vital role in helping the chair/chairperson during her/his term to address critical issues facing access to the mission, workforce, and infrastructure development.

A **R25,000** unrestricted annual gift to the organisation/institute provides membership in the Chancellor’s Circle. Connections include a wide array of exciting opportunities to interact with the Chair/Chancellor and other key organisational advocates:

1. Annual invitation to the Chair/Chancellor’s Gala Dinner.
2. Recognition on The Chair/Chancellor’s Circle honour roll.
3. Chair or Chancellor’s Circle corporate logo lapel pin.
4. Listing in the organisation/institute’s publications and website.

## Legacy Society

Another way to support the organisation/institute is to create study scholarships, best practice visits, learnerships, and enhance education & training in our community. This can be done through membership in the Legacy Society. Donors may designate gifts for the future by leaving a legacy of learning through planned giving. Benefits include:

1. Annual invitation to the Chair/Chancellor’s Gala Dinner.
2. Recognition in organisation/institute’s publications and website.
3. Invitation to the annual donor gala evening.
4. Corporate/Institution’s lapel pin/brooch.

## [Where applicable] Alumni Association

The XXX Alumni Association was established by a group of committed alumni to provide support to and promote XXX. A 50,000-member organisation, the Association currently works to develop a sense of community among alumni, and to promote the lifelong personal, educational, and professional growth of the alumni and students of XXX.

Members will qualify for a special (gold) XXX lapel pin and other branded merchandise.

The Association focuses its efforts on five main areas:

1. volunteerism,
2. scholarship programmes,
3. recognition programmes,
4. academic support programmes, and
5. programmes and services to meet the diverse needs of members and future members.

Membership information and materials may be obtained by contacting the Alumni Relations Office at (xxx) xxx-xxxx or by visiting the Association’s website at www.xxx.xx.xxx.

**Annual giving Levels and Privileges**

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## Annual Fund/ Recurrent Income

Each year, staff, alumni/retirees, students, parents, and friends choose to support everything from sport to research and development at XXX. These gifts are then deployed to fund research, provide emergency student/staff assistance, assist with travel to conferences and more throughout the year. By supporting these activities and services at XXX donors who make monthly, quarterly, six-monthly or annual donations contribute to the organisation/institute’s resilience and good standing. For these monthly gifts of R30,000 or more we are profoundly grateful.

## Leadership Fund

The Leadership fund is targeted at both internal and external senior staﬀ –– Board/Council, Senior Executives, Directors, HOD's, and Corporate Chairpersons who many ﬁnd resonance with the ideals and needs of XXX.

**R5,000 – R10,000** annual gift to XXX.

1. Invitation to the Chair/Chancellor’s Dinner.
2. Annual invitation to the XXX Donor Gala evening.

## [WHERE APPLICABLE] 'GRADitude Fund'

The 'GRADitude Fund' targets new XXX graduates who want to assist in the needs of the organisation/institution either in a direct debit order from their salary, or by electronic funds transfer (EFT) at their own discretion. This fund provides income for speciﬁc and *ad hoc* projects and is managed and reported on by the Alumni Relations Office.

**R3,000+** annual gift to XXX.

1. Funds may be designated to a specific scholarship fund.
2. Annual invitation to the Chair/Chancellor’s Dinner.
3. Annual invitation to the XXX Donor Gala evening.

## Sponsorship and CSI

This fund is aimed at raising funds for corporate events through sponsorships, like Golf Days, Auctions, Gala Events etc. Each year, XXX will identify appropriate Corporate Social Investment programmes and develop funds from them.

All stewardship protocols will apply to such donors except that such CSI funders may not be eligible for tax concession certificates.