

# Strengthening Stewardship Strategy

## Stewardship Effectiveness Audit

Institutions that fail to cultivate and advance their pipeline donors, especially those giving mid-level gifts (typically between \$1,000 and \$25,000), risk undermining their immediate returns from high-affinity donors as well as their long-term major gift prospects. Advancement leaders must turn to stewardship strategies that are scalable, tiered, and targeted to deepen giving relationships and position donors to advance through the pipeline.

Use the following audit to assess current offerings, identify gaps, and implement new best practices.

### Characteristics of Effective Stewardship

**1. Beneficiary narratives**

Share stories from gift recipients

**2. Personalized emails**

Create individualized messaging

**3. Social media**

Provide updates and donor recognition in real-time

**4. Tiered incentives**

Offer exclusive benefits by giving level

**5. On-demand reports**

Deliver personalized impact data

**6. Hands-on activities**

Leverage engagement and networking opportunities

**7. Leadership access**

Curate interactions with senior institutional leaders

**8. Networking events**

Build connections between donors

**9. Insider knowledge**

Share exclusive information and educational programming

### Audit Instructions

List your current stewardship offerings or programs. Then, check off the characteristics of each.

Current Stewardship Offerings	Characteristics		
1. _____	<input type="checkbox"/> Beneficiary narratives <input type="checkbox"/> Personalized emails <input type="checkbox"/> Social media	<input type="checkbox"/> Tiered incentives <input type="checkbox"/> On-demand reports <input type="checkbox"/> Hands-on activities	<input type="checkbox"/> Leadership access <input type="checkbox"/> Networking events <input type="checkbox"/> Insider knowledge
2. _____	<input type="checkbox"/> Beneficiary narratives <input type="checkbox"/> Personalized emails <input type="checkbox"/> Social media	<input type="checkbox"/> Tiered incentives <input type="checkbox"/> On-demand reports <input type="checkbox"/> Hands-on activities	<input type="checkbox"/> Leadership access <input type="checkbox"/> Networking events <input type="checkbox"/> Insider knowledge
3. _____	<input type="checkbox"/> Beneficiary narratives <input type="checkbox"/> Personalized emails <input type="checkbox"/> Social media	<input type="checkbox"/> Tiered incentives <input type="checkbox"/> On-demand reports <input type="checkbox"/> Hands-on activities	<input type="checkbox"/> Leadership access <input type="checkbox"/> Networking events <input type="checkbox"/> Insider knowledge
4. _____	<input type="checkbox"/> Beneficiary narratives <input type="checkbox"/> Personalized emails <input type="checkbox"/> Social media	<input type="checkbox"/> Tiered incentives <input type="checkbox"/> On-demand reports <input type="checkbox"/> Hands-on activities	<input type="checkbox"/> Leadership access <input type="checkbox"/> Networking events <input type="checkbox"/> Insider knowledge
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7. _____	<input type="checkbox"/> Beneficiary narratives <input type="checkbox"/> Personalized emails <input type="checkbox"/> Social media	<input type="checkbox"/> Tiered incentives <input type="checkbox"/> On-demand reports <input type="checkbox"/> Hands-on activities	<input type="checkbox"/> Leadership access <input type="checkbox"/> Networking events <input type="checkbox"/> Insider knowledge

# Strengthening Stewardship Strategy (cont.)

## Stewardship Effectiveness Audit

### Gap Analysis

Using the previous page, tally the check marks for each characteristic. The characteristics with the fewest check marks represent the gaps in your current stewardship offerings. Use the best practices guide below to strengthen your offerings.

#### Impact Messaging

Beneficiary narratives: \_\_\_\_\_

Personalized emails: \_\_\_\_\_

Social media: \_\_\_\_\_

#### Targeted Upgrading

Tiered incentives: \_\_\_\_\_

On-demand reports: \_\_\_\_\_

Hands-on activities: \_\_\_\_\_

#### Exclusive Benefits

Leadership access: \_\_\_\_\_

Networking events: \_\_\_\_\_

Insider knowledge: \_\_\_\_\_

### Best Practices Guide

Implement relevant best practices to move donors along the pipeline at your institution.



#### Impact Messaging

Characteristics	Best Practices
<b>Beneficiary narratives</b>	<ul style="list-style-type: none"> <li>• <a href="#">Student thank-you videos</a>: incentivize students to create scalable, donor facing content.</li> </ul>
<b>Personalized emails</b>	<ul style="list-style-type: none"> <li>• <a href="#">High impact emailing</a>: show donors the direct impact of their gift on campus.</li> </ul>
<b>Social media</b>	<ul style="list-style-type: none"> <li>• <a href="#">Social media ambassadors</a>: alumni share donation impact stories with their networks.</li> <li>• <a href="#">Publicized donor profiles</a>: promote donor profiles through social media.</li> </ul>



#### Targeted Upgrading

Characteristics	Best Practices
<b>Tiered incentives</b>	<ul style="list-style-type: none"> <li>• <a href="#">Tiered programming</a>: organize incentives by gift size to encourage higher giving.</li> <li>• <a href="#">Matching up</a>: match gifts to bring donors to the next level of giving.</li> </ul>
<b>On-demand reports</b>	<ul style="list-style-type: none"> <li>• <a href="#">Donor dashboard</a>: give donors real time data on their giving history.</li> <li>• <a href="#">Personal volunteer reports</a>: communicate impact of volunteer activities.</li> </ul>
<b>Hands-on activities</b>	<ul style="list-style-type: none"> <li>• <a href="#">Giving circles</a>: allow donors with similar interests to choose gift beneficiary.</li> <li>• <a href="#">Donor volunteers</a>: leverage engagement opportunities to increase giving.</li> </ul>



#### Exclusive Benefits

Characteristics	Best Practices
<b>Leadership access</b>	<ul style="list-style-type: none"> <li>• <a href="#">Password protected blog</a>: post the president's vision to increase donors access.</li> <li>• <a href="#">President council meetings</a>: ensure presidential attendance for top donor councils.</li> </ul>
<b>Networking events</b>	<ul style="list-style-type: none"> <li>• <a href="#">Strategic council mentorship</a>: pair donors to encourage upgrade giving over time.</li> <li>• <a href="#">Donor interest councils</a>: use personal interests to place donors onto councils.</li> </ul>
<b>Insider knowledge</b>	<ul style="list-style-type: none"> <li>• <a href="#">Insider series</a>: provide access to exclusive online educational series.</li> <li>• <a href="#">Presidential consultation program</a>: donors gain insight on institutional strategic plans.</li> </ul>