

Gift Society Tier Audit

Instructions:

Gift society tiers and corresponding stewardship initiatives are often established and sustained without studying donor giving trends. Answer the following questions to check the effectiveness of your current gift society levels, or to establish new levels.

Step 1: Develop Effective Gift Society Levels

Determine current donor trends by charting the number of current donors at each giving level.

Giving Level	Number of Donors	Average Gift Size	Average Years Spent Giving at Level	Average Wealth Rating
\$500-\$999				
\$1,000-\$1,499				
\$1,500-\$2,499				
\$2,500-\$4,999				
\$5,000-\$9,999				
\$10,000-\$14,999				
\$15,000-\$24,999				

Step 2: Distribute Stewardship Offerings Across Society Levels

Assess how stewardship offerings are allocated across the giving pyramid. Pay close attention to whether these offerings are structured to incentivize upgrades. The following questions will help advancement staff determine whether their stewardship program supports upgrades and consistent giving.

Questions to ask:

- Moving up the donor society pyramid, do stewardship initiatives increase in their level of exclusivity and senior leader access?

___ Yes ___ No

If no, shuffle around initiatives to ensure that in-person senior leader time is directed to top donors, but that donors at other levels still receive some senior leader access through digital channels and exclusive events.

- Do any stewardship offerings receive little or negative donor feedback?

___ Yes ___ No

If yes, evaluate the cost and importance of the stewardship offerings. Consider eliminating any honor rolls, certificates, or tokens that do not seem to resonate with donors.

Gift Society Tier Audit (cont.)

Marketing Gift Society Levels and Benefits

Estimate the number of times donors from each society level are alerted about the tier they belong to and its corresponding privileges.

Questions to ask:

- Are donors sufficiently informed of the different levels of the gift society and the stewardship offerings that accompany them?

___ Yes

___ No

If no, consider increasing the number and type of communications about the gift society, as well as the visibility of the society on the institution's giving website.

- Do all or most of advancement communications to gift society donors emphasize their society level and benefits?

___ Yes

___ No

If no, ensure that any communications to each donor segment thanks them for their past giving and details their gift society level and corresponding benefits.