

Assess Your Stewardship Practices

Many teams believe they are prioritizing leadership annual giving. Use the checklist below to assess whether your current data and stewardship practices are structured to support intentional growth.

Foundational Stewardship Practices

- All leadership annual donors receive a standardized acknowledgment within a defined time frame.
- We offer stewardship-specific events or experiences (not tied to solicitation).
- We provide personalized impact updates and communications tied to a donor's specific gift.
- Donors hear directly from faculty, students, or beneficiaries of their gifts.
- We provide at least one proactive (non-solicitation) touchpoint annually.
- We tailor stewardship based on donor level (not one-size-fits-all).

Consistency and Ownership

- We have a well-defined stewardship plan for leadership annual gifts, integrated into a larger donor engagement strategy.
- There is a designated owner responsible for the stewardship of each gift.
- We have clear ownership of ongoing donor engagement by segment.
- Stewardship responsibilities are documented and standardized across teams.
- We track whether planned stewardship touchpoints actually occur.
- Our donor interactions are consistently recorded in our CRM.
- We have defined timelines or cadences for stewardship (e.g., quarterly, annually).

Strategic Stewardship and Upgrades

- We track whether donors are upgrading year over year.
- We have defined criteria for when a donor should be moved into leadership annual giving.
- We proactively identify donors with the highest likelihood to upgrade.
- We adjust stewardship of gifts based on donor behavior, within a broader engagement strategy.
- We have a defined upgrade pathway for leadership annual donors.
- We use data to determine where donor progression is stalling.

Digital and Scale

- We use digital tools (dashboards, portals, automated updates) to support stewardship.
- Donors can access updates or impact information on demand.
- Stewardship communications are scalable beyond manual outreach.

Mostly Yes Structured and Scalable

Mixed Inconsistent and Reactive

Mostly No Limited Visibility into Donor Growth