

# **Extreme Stewardship: Paving the Way for Lifelong Investors**

## *Course Outline*

### **What is Stewardship?**

- Acknowledgement and receipt of a gift
- Donor recognition
- Proper entry and recording of the gift
- Honoring donor restrictions and/or intent
- Reporting back to the donor on the gift's impact
- Special events

### **What Role Does Stewardship Play in the Fundraising Cycle of Involvement?**

- Renewed gifts / donor retention over time
- Upgraded gifts / Increase in gift size and frequency
- Growing donor involvement in organization's mission and activities
- Cultivation for major gifts and planned gifts

### **Ways to Steward Donor Relationships in Meaningful Ways**

- Samples of acknowledgement letters, recognition pieces, and evidence of donor return on investment

### **Proven and Promising Practices: Group Activity**

Participants are split into groups to share best practices. Then, each group reports out on the best method identified in their group.

### **Importance of a Stewardship Plan**

- Stewardship activities segmented by level of giving
- Involving board members and other volunteers
- Sample stewardship plans for review
- Sample stewardship plan template

### **Stewardship Plan: Individual/Group Activity and Group Discussion**

Each participant sketches out a preliminary stewardship plan for their organization, which includes segmented stewardship activities based on level of giving and obtains feedback from other participants.

Instructor facilitates a group discussion on participants' stewardship plans created during the workshop: sharing strong ideas and answering questions and any remaining concerns.