



Stewardship Basics Scorecard

| Instructions: Fill in your score in the empty column. Add your total at the bottom and read about what each score means. | | Your Score | Possible Score |
|--|--|------------|----------------|
| 1 | Do you send an automated acknowledgement for every gift received online? Yes: 5 No: 0 | | 5 |
| 2 | Do you send a separate, more personal, thank you by email with 48 hours after receiving a gift online? Yes: 3 No: 0 | | 3 |
| 3 | Do you review daily the names of every donor who you received a gift from that day and consider appropriate additional thanks? Yes, daily: 5 No, but weekly: 2 No: 0 | | 5 |
| 4 | Do you have a system in place to ensure that each first time donor is thanked seven times for their gift? (No system = 0 points) 7 or moreX=7, 6X=6, 5X=5, 4X=4, 3X=3, 2X=2, 1X=1, 0X=0 | | 7 |
| 5 | Do you have a system in place to ensure that each active donor is thanked seven times over the course of a calendar year? (No system = 0 points) 7 or moreX=7, 6X=6, 5X=5, 4X=4, 3X=3, 2X=2, 1X=1, 0X=0 | | 7 |
| 6 | Do you annually review all thank you letters and gift receipts? Yes: 2 No: 0 | | 2 |
| 7 | How quickly does the first acknowledgement go out in the mail after a gift is received? Within 24 hours: 7 48 hours: 6 72 Hours: 5 Points 96 Hours: 4 Within a week: 3 Within a month: 1 When we get around to it: 0 | | 7 |
| 8 | In addition to sending an acknowledgement for each gift upon receipt, do you send an additional receipt to document the total number of gifts and total amount of gifts at the end of each year? (i.e. In January 2019 you send a letter with a report of all gifts given in 2018). Yes: 5 No: 0 | | 5 |
| 9 | Do you have a quarterly newsletter you send to your donors? Yes: 2 No: 0 | | 2 |
| 10 | Do all donors receive at least one thank you a year from a recipient of your services or someone who can give testimony to the importance of your work? Yes: 5 No: 0 | | 5 |
| 11 | Is every member of your staff trained to always say "thank you" and communicate with the donor how much they appreciate their support? Yes: 5 No: 0 | | 5 |

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|----|--|---------------------|------------|
| 12 | Do you systematically make thank you calls for every gift? All Gifts: 7 \$25 and up: 6 \$100 and up: 5 \$500 and up: 4 \$1,000 and up: 3 No: 0 | | 7 |
| 13 | Do you publish an annual report that includes a list of all of your donors? Yes: 2 No: 0 | | 2 |
| 14 | If you publish an annual report of donors, do you include the number of years a donor has been giving? Yes: 2 No: 0 | | 1 |
| 15 | Do you send a monthly "insider" report to your top donors and/or board members by mail or email? Yes: 3 No: 0 | | 3 |
| 16 | Do you have giving clubs at multiple levels? Yes: 5 Membership but no levels: 2 No: 0 | | 5 |
| 17 | Do you have a club and give public recognition in some form to people who have included your organization in their estate plans? Yes: 7 No: 0 | | 7 |
| 18 | Do you have a dollar amount threshold at which every donor would receive a handwritten thank you note? Yes: 5 No: 0 | | 5 |
| 19 | At what level do you send handwritten thank you notes? All Gifts: 7 \$25 and up: 6 \$100 and up: 5 \$1,000 and up: 4 None: 0 | | 7 |
| 20 | Do you periodically invite your donors to tour your facilities, meet with your staff, or in some way witness your work first hand? Yes: 10 No: 0 | | 10 |
| | | Score Totals | 0 |
| | | | 100 |

What do these scores mean?

90-100 You are rocking it! You're laying a great foundation of thanks and stewardship with your donors. Now, when you do BIG things to WOW your donors, you'll be building on a solid foundation.

75-89 You're doing good, but maybe not as good as you thought you were! Make some small changes and the basic level of thanks and stewardship that you give to your donors will be among the best around!

60-74 The BIG things you may be doing to thank and steward your donors may not have the impact you're hoping for because you're playing catch up.

60 or less You have a lot of work to do. Let's get this right before we move on.