

end|start

STEWARDSHIP SOLUTIONS

Question	5	4	3	2	1	0
Always = 5, Usually = 4, Sometimes = 3, Rarely = 2, Never = 1, What?!! = 0	Always	Usually	Sometimes	Rarely	Never	What? I've never heard of this.
Your stewardship communications (acknowledgements/receipts/annual reports etc) are personalized.						
You review annually your written stewardship plan with fundraising staff and leadership						
You formally test/evaluate the effectiveness of specific stewardship activities.						
Your organization provides training on stewardship to development staff.						
Establishing an individual stewardship plan for a specific donor is a routine part of finalizing a major gift to your organization from that donor.						
Donors of major/principal gifts to your organization consistently receive personal thank-you calls from your organization's president/CEO.						
You use a system to track the timeliness of gift acknowledgment correspondence.						
Gift agreements for endowed or other multi-year gifts to your organization clearly state the percentage of a gift that is used for overhead.						
Donors who have made gifts for endowment are provided annual reports on the performance and use of the fund.						
Donors have access to their endowment fund performance information returns via the web.						
Key volunteers play a significant role in personally thanking donors.						
You are involved in routine review of endowed fund performance and income use with key organization partners (leadership, finance, program).						
Major donors have an annual opportunity to meet with your organization's recipients or hear from them in their own words.						
Donors are made aware via solicitations and acknowledgments (not in tiny type or hidden on your website) what specifically their gifts support.						
Your board membership and governance committees are easily accessible on your website.						
TOTAL						
total of 75 points						
0 - 25 You need to develop a plan						
26 - 51= Moving in the Right Direction						
52 - 75 = Consider submitting yourself for "Best of"						