

STEWARDSHIP PLAN FOR NEW DONORS

WITHIN 1 WEEK OF GIFT DATE

Tax receipt/letter mailed – signatory: President Board of Trustees

Enclosures:

- Bookmark

WITHIN 30 DAYS OF GIFT DATE

Warm and fuzzy thank you/welcome letter mailed – signatory: Director of Development (w/teaser on outer mailing envelope)

Talking points

- Thank them for joining the organizational family/welcome back
- Share the impact of their donation
- They'll hear from a staff person or Board of Trustee member soon
- Invitation to visit website to read about organization, sign up for e-newsletter, monthly donations, planned giving, etc.
- Mentions giving clubs, volunteer opportunities
- Invitation to “friend” organization on Facebook
- We look forward to staying in touch during the year, etc.; Let them know what they'll receive during the year (newsletter, etc.)
- Invitation to contact Director of Development to take a tour of organization, of if they have any questions

Enclosures:

- Most recent annual report and/or most recent newsletter
- Reply device and envelope to change name/address/preferences/add e-mail/sign up for web/e-mail/request NO CONTACT
- A brief history of organization (*Organizational “brochure” – when available*)
- Direct of Development's business card

WITHIN 30 - 60 DAYS OF GIFT DATE

Outreach from development staff or Board of Trustee member

Talking points

- Make sure they received the welcome packet; ask if they have any questions/suggestions
- Thank them again
- Inquire as to reason for gift/connection to organization
- Encourage feedback

THROUGHOUT THE YEAR:

- E-newsletter – monthly for those providing e-mail addresses
- Newsletter – 3-4 per year
- Next copy of annual report
- Planned Giving mailings – 2-3 per year
- Invitation to become sustaining donor – 1-2 per year
- Personalized direct mail solicitation – IMO/IHO mailing depending on why first gift was made
- Invitations to events in their area – as appropriate