

The 4-A Stewardship Inventory[©]

Acquisition • Acknowledgement • Appreciation • Affinity

Research shows that it requires 4.5 times the effort, staff, and dollars to acquire a new donor as it does to keep one. Yet . . . some organizations seem to spend more time and energy pursuing a new giver than making the effort to keep the old friend.

We know that with proper planning (Acknowledgement and Appreciation) you can keep your donors. We have proven that with effective Stewardship (Affinity), you can be certain of very high retention and an enthusiastic donor base. If you follow systematic procedures, the program is as close to fail-proof as you can get. Securing (Acquisition) is obviously the first step. But there will be poor retention unless you acknowledge promptly and effectively, show appreciation regularly and sincerely, and give priority to winning the donor's heart and mind to the cause. These are all the components of the program you should follow.

Here is a test that will examine how effective you are in your Stewardship (maintenance) program. The instrument has been tested in the field to determine its comprehensiveness and the validation of the scoring. It was then reviewed and approved for use by the Board of Visitors of the Institute.

If it is true, and it is—that it makes more sense to keep (and increase the level of giving) of your donors . . . then effective Stewardship and the **4A** cycle deserves a priority of your organization's time, energy, and staff allocation.

Keeping your donors is not a matter of good luck. It means having a systematic program in place and unending attention to effective implementation. The dividends to your organization will be extraordinary.

—The Institute for Charitable Giving

Here is how to determine the effectiveness of your **Stewardship 4As**. Total the points you indicated in the right hand column and compare them to the Table that follows:

TOTAL POINTS	YOUR STEWARDSHIP QUOTIENT
90 - 77	Outstanding—you're doing great!
76 - 63	You're doing well, but some areas still require attention.
62 - 50	Your stewardship is only fair—you could improve dramatically with some effort.
49 and below	Much additional effort is needed.

QUESTIONS		POINTS
1	Do you have a systematic design and plan in place, and in writing, that indicates specifically your acknowledgement and stewardship program? Yes= 3 pts. No= 0 pts.	
2	Is your stewardship plan in the form of a Manual and is it reviewed at least annually for effectiveness and relevancy? Yes= 2 pts. No= 0 pts.	



INSTITUTE FOR
CHARITABLE GIVING

The Stewardship Inventory

QUESTIONS	POINTS
<p>3 Does your development committee or Foundation have a subcommittee on stewardship that meets regularly?</p> <p>At least twice a year= 3 pts. Once a year= 1 pt. No committee= 0 pts.</p>	
<p>4 Does your organization issue a sufficient number of acknowledgement letters or thank you notes for every gift received?</p> <p>7 or more= 5 pts. 5 or 6= 4 pts. 3 or 4= 3pts. 2= 1 pt. 1 only= -1 pt.</p>	
<p>5 Are acknowledgement letters reviewed at least once a year and changed?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>6 Have you used an outside source or some of your volunteers to test the appropriateness, effectiveness, and <i>personal touch</i> of your letters?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>7 How long does it take your organization to send out the first acknowledgement letter after a gift is received?</p> <p>24 hours= 5 pts. 48 hours= 4 pts. 72 hours= 3 pts. 96 hours= 2 pts. 5 days= 1 pt. 5-10 days= 0 pts. longer than 10 days= -2 pts.</p>	
<p>8 Do you issue a formal receipt, in addition to your acknowledgement letter, which can be retained by the donor for his or her tax records file?</p> <p>Yes= 1 pt. No= 0 pts.</p>	
<p>9 Do you report outcomes and results to your donors (by personal contact, letter, or telephone) of how important their gift was to those your organization serves?</p> <p>Yes= 4 pts. No= 0 pts.</p>	

QUESTIONS	POINTS
<p>10 Do you issue financial reports to your endowment fund donors which provide investment value and performance information on their individual donor's fund?</p> <p>Yes= 2 pts. No= 0 pts. Not applicable= 0 pts.</p>	
<p>11 If yes to #10, how often do you issue fund reports?</p> <p>Quarterly= 2 pts. Semi-annually= 1 pt. Annually= 0 pts.</p>	
<p>12 It is highly desirable that donors have the joy and continued involvement in the gifts they make. Do you encourage agreements in your endowment funds to allow donors to create their own gift program?</p> <p>Yes= 3 pts. No= 0 pts. Not applicable= 0 pts.</p>	
<p>13 Is the payment given to life income recipients issued on a bank check or on a check with the institution's name?</p> <p>Institution= 2 pts. Bank= 0 pts.</p>	
<p>14 How are the life income checks sent?</p> <p>Taken in person= 3 pts. Taken in person on a selective basis= 2 pts. Mailed with a thank you= 1 pt. Mailed= 0 pts.</p>	
<p>15 In your acknowledgement program do you systematically include letters or contacts from your institution's beneficiaries—such as students, patients, campers, etc.?</p> <p>Yes= 3 pts. No= 0 pts.</p>	
<p>16 Do staff members or volunteers systematically call and thank individuals who donate over a certain threshold amount?</p> <p>Calls at \$100 level= 4 pts. Calls at \$1000 level= 1 pt. No calls= 0 pts.</p>	

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<p>17 Does your organization publish an Annual Report which includes some sort of Honor Roll of donors?</p> <p>Yes= 3 pts. No= 0 pts.</p>	
<p>18 In the Honor Roll, do you indicate the number of years of continuous giving for each donor?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>19 Do you list the names of husbands and wives separately (John and Mary Brown)?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>20 Does your fundraising staff actively plan for and build into their plans regular stewardship calls or <i>moves</i>?</p> <p>Yes= 3 pts. No= 0 pts.</p>	
<p>21 Do you publish a CEO letter or newsletter which is sent every 4 weeks to a small select list of major gift donors, prospects, and influentials?</p> <p>Every 4 weeks= 4 pts. Quarterly= 2 pts. Sent, but not on a regular basis= 1 pt. Not sent out= 0 pts.</p>	
<p>22 Do you publish a newsletter or magazine which is mailed to your donors which provides major space for stories about donors and gives recognition for their gifts?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>23 How often are these published?</p> <p>Quarterly= 3 pts. Semi-annually= 2 pts. Annually= 1 pt.</p>	

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<p>24 Does your staff actively discuss stewardship activities and at least annually review stewardship plans and activities?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>25 Are stewardship activities built into your budgeting process so there are funds for an active program?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>26 Has your organization conducted a donor survey or held donor focus group sessions in the past 24 months?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>27 Does your organization regularly survey currently lapsed donors to determine the reasons they might have dropped out?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>28 Do you (or would you) proactively communicate with your donors about organizational changes or issues even though they may be somewhat unpleasant or sensitive?</p> <p>Yes= 1 pt. No= 0 pts.</p>	
<p>29 Do you have gift clubs or levels where you recognize donors for their cumulative giving?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>30 Do you consistently provide donor recognition through such things as gift clubs, walls of honor, signage, dinners and/or receptions, etc.?</p> <p>Yes= 2 pts. No= 0 pts.</p>	

QUESTIONS	POINTS
<p>31 Do you have a Heritage group (or a name of some sort) that provides recognition for those who have made a planned gift or have provided for you in their estate plans?</p> <p>Yes= 4 pts. No= 0 pts.</p>	
<p>32 Do you monitor and evaluate what other charitable organizations are doing in the area of stewardship?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>33 Do you periodically provide <i>hospitality</i> and courtesy sessions to support staff and other appropriate staff in order to give them a sense of membership and render them more proactive, courteous, and effective?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>34 Do you actively involve major donors through <i>job shadowing</i>, taking them on tours, or in some other fashion personally introducing them to the beneficiaries of your service?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>35 Do you in some creative fashion reach out to your donors in non-conventional ways through such media as e-mail, web sites, audio tapes, videotapes, etc.?</p> <p>Yes= 2 pts. No= 0 pts.</p>	
<p>TOTAL:</p>	

QUESTIONS

POINTS