

Donor Cultivation & Stewardship

Questions to Guide Your Planning

Taking time to reflect on how you are cultivating and stewarding your key donors and prospects is key to thoughtfully and purposefully developing relationships that lead to transformational partnerships and investments.

Consider reflecting on the following questions to help guide your planning and strategy with key donors.



- Are you regularly reporting impact and outcomes – not just numbers served, but how you’ve fueled opportunity, change, and transformation?
- Are you telling stories about the impact of your organization’s philanthropy?
- Are you telling stories of how giving to your organization has changed donor’s lives – not just recipient’s lives?



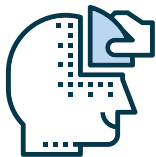
- Have you included the spouse/partner in invitations to meet, cultivation activities and stewardship moves?
- Do additional family members need to be included?
- Are there others around the donor who should be included in the cultivation or stewardship (e.g. financial advisor, key gatekeeper, grandchildren, assistant)?



- Would a note or phone call from a faculty member or program director be meaningful?
- Would a written report be appreciated? Or a verbal presentation?
- Would mailing or emailing an article or mention of the work you do, the industry you are a part of, highlight of a contribution one of your program directors/faculty has made to the field be appreciated?
- Have we been consistent in touches and moves with this donor?
- Have we asked the donor about their stewardship and communication preferences?
- Have we done a cultivation or stewardship touch that has been memorable? Even out-of-the-box?
- Would being playful or whimsical be appreciated?



- Have you considered the current level of giving relative to the potential capacity of the donor?



- Have you varied the stewardship type/venue/presentation for longtime donors?
- Have you noted when circumstances shift or “tip” with your donors to reveal an opportunity?



- Have you kept in touch even if you are not in a gift discussion to educate, connect or ask for counsel?