



# Stewardship Planner

The key to converting one-time donors to recurring donors and mitigating churn is stewardship. You should be following the general best practices outlined below.

Stewardship Category	Engagement Action	Timeline	New Donors	Recurring Donors	Mid-Level Donors	Major Donors
Acknowledgment	Thank you email	Within 24 hours	✓	✓	✓	✓
	Welcome Email	Within 24 hours	✓	✓	✓	✓
	Thank you call	Within 48 hours				✓
	Personal Email/Letter	Within 1 week				✓
Recognition	Donor Spotlight in Social Media	Monthly		✓	✓	✓
	Donor Spotlight in Newsletter	Quarterly		✓		✓
	Donor Event/Gala	Annually		✓		✓
	Incentive/Small Gift	Annually		✓		✓
Reporting	Newsletter	Quarterly	✓	✓	✓	✓
	Impact Report	Annually	✓	✓	✓	✓
Ongoing Engagement	Supporter Meet-Up	Monthly	✓	✓	✓	✓
	Volunteer Opportunities	Quarterly	✓	✓	✓	✓
	Holiday Card	Annually	✓	✓	✓	✓
	Donor Anniversary Card	Annually	✓	✓	✓	✓
	Exclusive Meet-Up <small>(coffee with the founder, office tour, luncheon, etc)</small>	Annually		✓		✓
	Donor Survey	Annually	✓	✓	✓	✓