

Building a Stewardship Matrix

Move your donors up the Ladder of Engagement while minimizing donor attrition.

Having a well thought out and logical thanking and stewardship structure is important for ensuring fairness to your donors, simplifying your process, and keeping donors engaged and informed. Donor stewardship can begin once a donor has given to your organization. When that has occurred, you are now in a position to build and strengthen the relationship, keeping your donors involved and encouraging them to become more engaged with your organization.

Create your own Stewardship Matrix in THREE easy steps.

Step 1: Identify Your Donor Types – monthly, one-time, quarterly, bequests, in-kind

Step 2: Identify gift amounts for your organization. For some a “major gift” might be \$250. For others, you might have an entry level gift of \$25. Break your gift levels down to around 7 levels (see sample).

Step 3: What are the different ways you are engaging your donors? Does everyone receive an “acknowledgement letter”? The answer to that question should be YES! Do you provide a gift, like a sticker or calendar when people sign up as members? Do your major donors receive a personal phone call from ED or Board Chair? List all the ways you engage your donors (monthly e-newsletter, annual report, phone calls, coffee visits, etc.)

The following sample stewardship matrix shows a way to provide increasing levels of stewardship and personal connection as donors give more.

Sample Stewardship Matrix

Donor Type		Gift Amount	Acknowledgement Letter	New Donor Welcome Packet	Print Newsletter	Personal Email	Small Gift (Calendar, Magnet, etc.)	Major Donor Event	Phone Call from BOD	Quarterly Major Donor Special Newsletter	E.D. Handwritten Card or Call	Stewardship Trip Special Invite
Monthly	Up to 9	X	X	X								
One-time	up to 99											
Monthly	10 - 29	X	X	X	X							
One-time	100 - 299											
Monthly	30 - 49	X	X	X	X							
One-time	300 - 499											
Monthly	50 - 99	X	X	X	X	X	X					
One-time	500 - 999							X				
Monthly	100 - 199	X	X	X	X	X	X	X	X			
One-time	1,000 - 2,499											
Monthly	200 - 399	X	X	X	X	X	X	X	X	X		
One-time	2,500 - 4,999											
Monthly	400 & up	X	X	X	X	X	X	X	X	X	X	
One-time	5,000 & up											
Bequest			X	X			X	X	X	X		