



Stewardship Audit

For each question, give your organization a score of 1 to 5:

- 5 – We have done this and are 95% satisfied with the result
- 4 – We have done this and are 75% satisfied with the result
- 3 – We have done this and we are 50% satisfied with the result
- 2 – We have started this process
- 1 – We have not attempted to do this but think we should

Organizational Perspective

1. My organization involves board, staff and volunteers in the stewardship process
2. My organization has written stewardship policies and procedures
3. My organization measures stewardship activities by generating statistics, data and impact reporting to donors
4. My organization is always up-to-date on financial, receipting and legal obligations including gift agreements, cost of fundraising statement and regular internal reviews
5. My organization proactively promotes stewardship and has integrated stewardship activities into our external marketing and communications plan

Donor-Centric Perspective

6. We have conducted a donor retention analysis and know exactly how many of our donors are repeat donors and how many are lapsed
7. We contact our major donors at least once every two months and record the meeting notes in an accurate and timely fashion in our database



- 8.** We provide meaningful donor experiences as evidenced by donor loyalty and engagement with our organization
- 9.** We pro-actively seek opportunities to engage our donors in our organization at various levels
- 10.** We ensure every donor communication / contact with our major donors is personalized

How did you score?

40 – 50: Your organization is providing great stewardship! You will benefit from continued learning and adoption of best practices

30 – 39: Your organization needs to refine an already effective Stewardship Plan

15 – 29: Your organization needs to revisit and rework its existing Stewardship Plan

0 – 14: Your donors deserve a stewardship overhaul

