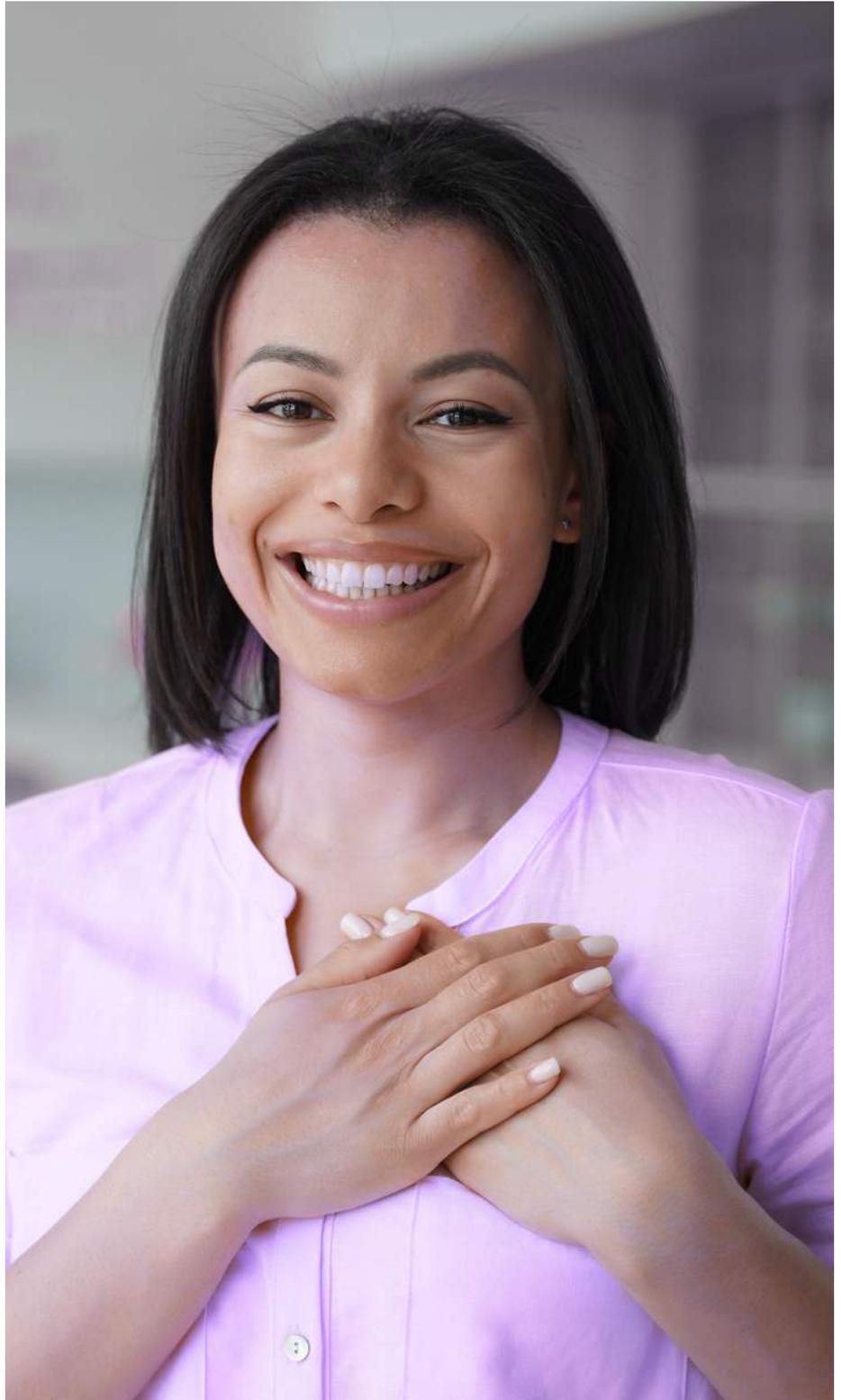


STEWARDSHIP

TOOLKIT



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STEWARDSHIP TOOLKIT

A Practical Guide to Thanking Donors Well

Donor engagement is built through intention, consistency, and care—and through following proven donor-stewardship practices. A donor touch is any intentional interaction that acknowledges a gift or keeps a donor connected, without an immediate ask.

“Who Does What” Stewardship Workflow

Stewardship Is a Shared Responsibility

Donor acknowledgment works best when roles are clear and follow-up is planned. This workflow outlines who is responsible for each step—so no gift goes unnoticed and no donor drifts away in silence.

1. Gift Is Received

Primary Responsibility: Administrative staff / Development staff

Timing: Same day or within 24 hours

- Record gift in CRM
- Verify donor contact information
- Flag gift level (first-time, recurring, significant, major)
- Trigger acknowledgment workflow

2. Written Acknowledgment (Required)

Primary Responsibility: Development staff

Timing: Within 48 hours (when possible)

- Prepare written acknowledgment letter
- Confirm inclusion of required IRS elements:
 - Organization name and EIN
 - Date and amount of contribution
 - Statement of whether goods or services were provided
- Send acknowledgment before donor files their tax return
- Record date sent in CRM

3. Personal Thank-You Call

Primary Responsibility:

- Executive Director (for major or lead gifts)
- Development staff (for mid-level gifts)

Timing: Same day or within 72 hours

- Place thank-you call
- Leave voicemail if donor is unavailable
- Capture any donor feedback or insight in CRM

4. Board Member Engagement

Primary Responsibility: Board members (coordinated by staff)

Timing: Within 7 days

- Assign board member for handwritten note
- Provide brief donor context and sample language
- Confirm note sent
- Track completion

5. Follow-Up Touch (No Ask)

Primary Responsibility: Development staff

Timing: 30–90 days after gift

- Share a short impact update or story
- Invite donor to engage (event, story, conversation)
- Note donor response or interest

6. Oversight & Accountability

Primary Responsibility: Executive Director / Board Chair

- Review acknowledgment timeliness quarterly
- Identify gaps or delays
- Reinforce shared stewardship expectations

A Standards Check

Before closing the loop, confirm that basic stewardship standards have been met.

If required acknowledgments or follow-up are incomplete, the system—not the donor—has been put at risk.

Remember: For charitable contributions of \$250 or more, IRS regulations require donors to receive written acknowledgment containing specific information. Timely acknowledgment supports both donor stewardship and compliance.

This toolkit supports best practices.

Strong donor engagement is built through systems that help people feel seen, valued, and connected year after year.

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SAMPLE LETTERS

Sample Thank-You Letter

Purpose: Provide timely, professional acknowledgment that meets IRS requirements and reinforces donor trust—without unnecessary complexity.

Use for: Gifts of \$250 or more, first-time donors, recurring gifts at or above this level, and general annual support.

[Organization Name]
[Organization Address]
[City, State, ZIP]
[Organization Phone / Email]
[Organization EIN / Tax ID]

[Date]

[Donor Name]
[Donor Address]
[City, State, ZIP]

Dear [Donor Name],

Thank you for your generous gift of \$[amount], received on [date], in support of [organization name].

Your gift reflects a meaningful investment in our work, and we are deeply grateful for your support. Because of contributions like yours, we are able to [brief, specific impact statement—1 sentence maximum].

No goods or services were provided in exchange for this contribution. This letter may be retained for your tax records. *[Or state the FMV amount of goods received and list item(s)].*

Sample Thank-You Letter *(Continued)*

Beyond the formal acknowledgment, please know how much your generosity is noticed and appreciated. Gifts like yours help us move our mission forward with care and purpose, and we are grateful for the trust you place in our organization.

If you ever have questions about your support or would like to learn more about how your gift is making a difference, I would welcome the opportunity to connect.

With sincere thanks,

[Signature]

[Name]

[Title]

[Organization Name]

[Direct phone or email, if appropriate]

Pro Tip:

For significant or lead gifts, consider pairing this letter with a same-day or next-day phone call and a handwritten note from staff or a board member. The letter fulfills the requirement; the follow-up builds the relationship.

Short Thank-You Letter (for Smaller Gifts)

Purpose: Timely, warm acknowledgment that still feels personal—without over-engineering.

Use for: First-time donors, recurring gifts, and general annual support.

Sample Short Thank-You Letter

[Organization Name]

[Organization Address]

[City, State, ZIP]

[Organization Phone / Email]

[Organization EIN / Tax ID]

[Date]

[Donor Name]

[Donor Address]

[City, State, ZIP]

Dear [Donor Name],

Thank you for your gift of \$[amount] in support of [organization name]. We're grateful you chose to be part of this work.

Because of supporters like you, we are able to [brief impact phrase—one line]. Your generosity helps move our mission forward in meaningful ways.

No goods or services were provided in exchange for this contribution [*Or state the FMV amount of goods received and list item(s)*]. This letter may be retained for your tax records.

Short Thank-You Letter *(Continued)*

Thank you again for your support and for believing in what we do.

Sincerely,

[Name]

[Title]

[Organization Name]

Tip for staff:

Use the donor's first name in the greeting whenever appropriate. Small touches matter.

Board-Member Thank-You Note Template

Purpose: Reinforce shared leadership and signal that gifts are noticed beyond staff.

Use for: Major gifts, long-time donors, milestone or surprise gifts.

Format: Handwritten note (strongly recommended)

Sample Board Thank-You Note

Dear [Donor Name],

I wanted to personally thank you for your recent gift to [organization name]. As a board member, I have the privilege of seeing firsthand how support like yours makes a difference. Your generosity strengthens the work and helps ensure it continues with care and purpose.

Thank you for believing in this mission and for being part of our community of supporters. We truly appreciate you.

With gratitude,

[Board Member Name]

Board of Directors

[Organization Name]

Tip for boards:

One or two sincere sentences in a real voice is far more effective than a long message.

It's okay to keep the amount of the gift confidential, and in some cases, donors appreciate discretion.

Phone Call Thank-You Script

(Pairs with either letter—especially for significant gifts)

Purpose: Create connection, not conversation fatigue.

Use for: Major gifts, first-time larger gifts, or donors you want to retain.

Phone Call Script (2–3 minutes)

Opening

“Hi [Donor Name], this is [Your Name] from [organization name]. I’m calling to thank you personally for your recent gift of \$[amount].”

(Pause. Let them respond.)

Gratitude

“I just wanted you to know how much we appreciate your support. Your gift helps [brief impact statement—one sentence].”

Optional Engagement Question

(Only if appropriate—no pressure.)

“If you don’t mind me asking, what prompted you to give at this time?”

(Listen. Make a note later.)

Close

“Thank you again for your generosity. We’ll be sending a written acknowledgment as well, but I wanted to make sure you heard our thanks directly.”

“Have a wonderful day.”

If voicemail:

“Hi [Donor Name], this is [Your Name] from [organization name]. I’m calling to thank you personally for your generous gift. We truly appreciate your support and wanted you to hear our thanks directly. Have a great day.”