Stewardship/Cultivation Checklist 2013

Donor Impact Strategies:	**Who:**	**When:**	**Cmpltd:**
Impact report (Cause)_____			
Endowment report			
Newsletters			
Other Update Info.			
Post Card			
Other: _____			
Other: _____			
Other: _____			

Written / Oral Communications	**Who:**	**When:**	**Cmpltd:**
TY Phone call to donor			
Personalized thank you letter			
Spec TY from CEO, Board Chair			
TY from recipient of organization			
Special TY from _____			
Board Member TYs			
Pledge Paid In Full TY call			
TY postcard			
Brochures			
Email			
Contact Natural Partner			
Birthday Card			
Holiday Card			
Anniversary Cards			

Public Recognition:	**Who:**	**When:**	**Cmpltd:**
Naming Opportunity_____			
Newsletter (profile)			
Plaque			
Unveiling of name on donor wall			
Other: _____			
Other: _____			
Other: _____			
Other: _____			

Coordinator Follow up:	**Who:**	**When:**	**Cmpltd:**
Schedule 1st meeting with AM			
Code Donor as VIP			
Code Family Members			
Schedule actions			
Schedule F/U meeting with AM			
Other: _____			
Other: _____			
Other: _____			

Hold Until:

Face-to-Face Actions:	**Who:**	**When:**	**Cmpltd:**
Tour			
Coffee invite			
Lunch invite			
Other invite			
Interviews/Meetings w/ _____			
Referral to Planned Giving			

Gifts & Special Touches:	**Who:**	**When:**	**Cmpltd:**
Coffee Cards			
VIP Gift			
Photos			
Books			
Memory books			
May Day Baskets			
Holiday wreath			
Poinsettias			
Gift (birthday)			
Gift (holiday)			
Customized Gift			
(plant, flowers, food/wine, personal, other)_____			
Memorial Gift/Card			
Birth Gift/Card			
Other:			

Special Events:	**Who:**	**When:**	**Cmpltd:**
Invite to _____			
Invite to _____			
Invite to _____			
Invite to _____			
Special VIP receptions			
F/U Post Event			
Other:			
Other:			

Making it REAL / Creating the WOW Experience:

Annual Appeals:

Send Annual Appeal YES NO

Cause: _____

Action Reminders:
(days, weeks, months)

Coordinator Notes: