



## Stewardship Plan Template

- 1. CARE - Personal Connection - Select one or more items that you can complete on an annual basis**
  - a. Handwritten thank you notes
  - b. Phone calls
  - c. Personal meetings
  - d. Personalized letter sharing the impact you are having on members of your community
  - e. Meaningful Gift – pin, print, mishloch manot, Challah and honey etc.
  - f. Cards – Birthday, Holiday, Anniversary of Legacy commitment
  - g. Interview for testimonial
  - h. Other creative ideas
  
- 2. SHARE - Donor Listings/Testimonials – Select one or more items you can complete on an annual basis – recommend listings appear at least 4 times a year and testimonials as often as you can**
  - a. Donor Listings**
    - i. In newsletter/newspaper
    - ii. On website
    - iii. Poster, digital display or donor wall in lobby
    - iv. Annual report or printed event materials
    - v. Projected on screen at annual meeting or other events
  - b. Testimonials from current legacy donors (make sure to get permission for vehicle you intend to use)**
    - i. In newsletters/newspaper
    - ii. On website
    - iii. Poster or digital display in lobby
    - iv. In annual report, or printed event materials
    - v. Projected on screen at annual meetings or other programs
    - vi. On Facebook or in blast emails
  
- 3. HONOR - Recognition at “community” gatherings – Select one or more events you can implement on an annual basis**
  - a. Legacy Shabbat
  - b. Annual meetings – recognize current donors and/or light candles for those who have passed
  - c. Galas or other special events
  - d. Other creative ideas
  
- 4. INVITE - Special gathering for Legacy donors – Select one or more events you can implement on an annual basis**
  - a. Reception before or after a “community” gathering (event)
  - b. Shabbat Dinner
  - c. Event not open to the general community (School play, graduation or special ceremony)
  - d. Private gathering (cocktails, dessert, etc.)
  - e. Other creative ideas

<b>Stewardship Activity</b>	<b>Dates to be implemented</b>	<b>Individual Responsible</b>

<b>Stewardship Activity</b>	<b>Dates to be implemented</b>	<b>Individual Responsible</b>