



Stewardship Plan Template

- 1. CARE - Personal Touch - 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

| Stewardship Activity | Dates to be implemented | Individual Responsible |
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| Stewardship Activity | Dates to be implemented | Individual Responsible |
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