FREEWILL
Donor
Stewardship
Summit

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SYSTEMS THAT SCALE

Why data is the foundation of scalable stewardship

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Overview

We built this session because you asked for it. Partners came to us and said: we don't need more stewardship best practices — we need help with the process. The data. The CRM. The stuff that makes stewardship actually work at scale.

Today we're going to show you how to set up your CRM so your donor data works for you — not against you. We'll walk through the Donor Stewardship Matrix, talk through coding logic for planned and smart gifts, cover how to get FreeWill data into your system, and leave you with an actionable guide you can take straight to your team.

Get ready to participate!

FREEWILL
Donor Stewardship Summit

Introductions

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Agenda

1. Why data is the foundation of scalable stewardship
2. Introducing the Donor Stewardship Matrix
3. Setting up your CRM to track stewardship
4. Getting FreeWill data into your CRM
5. The Actionable Guide: Audit, Build, Execute

You will walk away with two things today: an editable Donor Stewardship Matrix and an actionable guide. Both are available to download here and will live in the Partner Resource Hub starting next week.

Housekeeping

1. This session is being recorded
2. The recording will be available here later today
    - Later this month, we'll add it to the Learning Hub (accessible in your Partner Portal)
3. The slide deck can be downloaded below
4. This session is CFRE-approved for 1.0 continuing education credit

Why data is the foundation of scalable stewardship

Raise your hand if you've ever inherited a CRM and thought...what is happening here???

(Drop a 👋 in the chat if this has been you.)

We've all been there. And we've seen what happens when one person builds a system in their head and then leaves.

Planned gift donors stewarded for years — suddenly invisible.

Smart gifts sitting untagged. No way to pull a clean list. No way to know who's been contacted or when.

The best way to avoid these challenges is to acknowledge that clean data is essential for stewardship!

What good data infrastructure actually enables:

1. **Segmentation** — knowing which groups of donors need what type of outreach and when
2. **Gift tracking** — a complete, consistent record of every gift regardless of who entered it; a holistic look at each donor's contributions
3. **Reporting** — the ability to pull meaningful donation and financial reports at any point in time, including reports on your PG/SG pipeline
4. **Scaling** – stewarding large numbers of donors through more automated processes

Introducing the Donor Stewardship Matrix

Organized by:

- Communication type:

  Acknowledgment, Recognition, Reporting, Ongoing Engagement
- Timeline
- Donor segment

Customizable by you!

CRM agnostic: The logic applies regardless of what database system you work in

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Donor Stewardship Matrix	Communication type	Timeline	First-time giver	Loyal/Longevity donors	Volunteers/ Staff	Monthly sustainers	Mid-level donors	Smart gift donors	Major donors	Planned gift donors	*[Add other donor segments here]*
Recognition	Legacy society invite or welcome package	Within the first month								✓	
	Ask them to share their donor story	3 months			✓			✓	✓	✓	
	Confirm communication and recognition preferences	Annually			✓	✓	✓	✓	✓	✓	
	Annual report listing	Annually							✓	✓	
	Consider for highlight in newsletter	Annually			✓		✓	✓	✓	✓	
	Annual donor lunch invite	Annually		✓					✓	✓	
	Naming opportunities	As appropriate							✓	✓	
	[Add your activities here]										
	Impact Report (emailed)	Quarterly	✓	✓	✓	✓	✓	✓	✓	✓	
	Impact Report (mailed)	Quarterly							✓	✓	

How to use it at your organization

This is a starting point, not a prescription

Your org's capacity, staff size, and donor base should shape how you adapt it

Start by asking:

1. Which donor segments are you most focused on cultivating?
2. Are your FreeWill donors accounted for in thos segments?
3. What touch points do you already deploy? What is missing? What is realistic to add?
4. Who is the internal task force/team that will review the matrix and share responsibility for implementing it?

Donor Stewardship Matrix

Available for download here

Will live in the Partner Resource Hub for future access

Which segment do most of your FreeWill donors currently fall into?

(Drop your answer in the chat)

Setting up your CRM to track stewardship

Our goal today isn't to tell you what to name your fields.

Every CRM is different. We're not here to give you a field-by-field setup guide. We want to give you the logic and criteria so you can make those decisions confidently in your own system.

Before we get into it:

Does your team track smart gifts like stocks, QCDs, and DAF grants differently than cash gifts? For example, could you pull a list today of all QCD gifts made in the last 18 months?

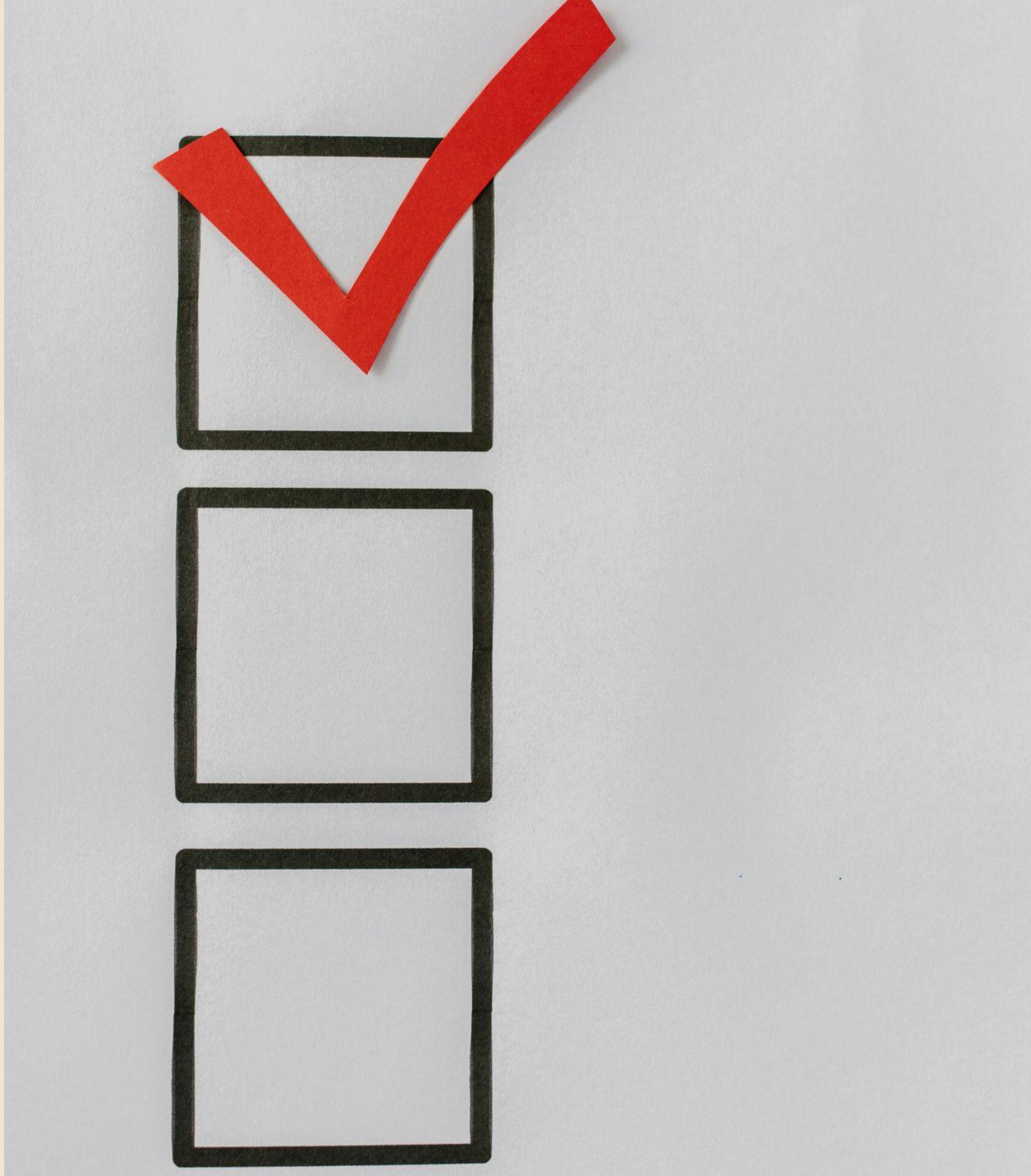
Coding logic: Smart Giving

What to capture on every smart gift record:

1. Gift amount and date
2. Gift type (stock, IRA, DAF, etc.)
3. Recurrence (one-time vs. recurring)
4. Source (specific appeal, FreeWill platform)
5. Donor link to their contact record

Code gifts to facilitate segmentation for reporting, stewardship, and identifying repeat smart givers worth cultivating

Smart gifts are an indicator of wealth, and an ongoing engagement play – code them so you can act on them!



Coding logic: Planned Giving

The most important distinctions to get right:

1. **Criteria at the contact level**

   PG Prospect: Donor expressed interest, fits your profile, or is in conversation, but hasn't confirmed

   Confirmed PG Donor: Gift intention disclosed and documented/verified

2. **Criteria at the gift level**

   Gift Type: Distinct gift types for planned gifts

   Gift Status: Distinct options for planned gifts that are in cultivation, confirmed/committed, and received

   Recognition Preference: May be different than the donor's preference for annual gifts

This coding helps both with stewardship and clean, transparent reporting

Drop a 👍 if you currently have separate constituent codes for PG prospects vs. confirmed PG donors

Before you build segments in your CRM, get aligned internally on four questions:

- Who goes in each segment?
- How long do they remain in the segment?
- What would cause them to roll off?
- Who owns keeping segments clean?

Segmentation criteria

- Once your gifts and donors are coded, segmentation asks: *What does this donor's relationship with us look like right now?*
- Segmentation should be based on documented data, not memory or gut feelings
- That's what makes it scalable when staff turns over

Scenario: Josephine completed a planned gift through FreeWill last year. She gives annually, has attended your gala twice, and regularly volunteers. She's never responded to a legacy society invitation.

Which segment(s) does she belong in? Tell us in the chat.

Getting FreeWill data into your CRM

Three pathways, one goal:

Clean, current, consistently coded records you can actually use

API integration

- It’s availabe but it's technically complex to set up and isn't something FreeWill supports actively during onboarding
- Worth exploring for FreeWill partners with a heavy volume of results and tech/IT support at their organization
- For most partners, one of the other two options will be the better call

Download/Import (*recommended*)

- Export list of gifts/donors as a CSV from the Partner Portal
- Recommended cadence: Once a week, or more frequently with high bequest volume
- Most realistic for the majority of partners
- **Common mistake:** Importing a CSV but not updating records if a donor modifies or deletes their gift in FreeWill

Manual entry

- Best choice for smaller orgs or those with lower gift volume
- Works well when someone owns the process consistently
- **Risk:** Vulnerable to inconsistent coding — it lives or dies by the person doing entry

Three pathways, one goal:

Clean, current, consistently coded records you can actually use

- Code it correctly — every time
- Apply your gift type, gift status, source, and constituent codes consistently at the point of entry. This is what connects a new record to the right segment.
- Watch for changes
- FreeWill donors can modify their gift after you've imported it. Build a regular check into your import cadence to catch updates — not just new records.
- Let the data do the work
- When records are clean and consistently coded, your segments populate automatically. That's the payoff: instead of manually managing a list, you're pulling a report.

The Actionable Guide: Audit, build, execute

Phase 1: Audit

Involve your Database Manager, Development Operations, or whoever "owns" CRM data

- Pull your current PG/SG donor list and review it
  - Who is on it?
  - How are they coded?
  - Are there gaps or inconsistencies?
- Review existing PG- and SG-related CRM codes
  - Are they being used consistently?
  - Do they reflect the distinctions we talked about today?
- Check your FreeWill import cadence
  - When was the last time FreeWill data was synced into your CRM?
  - Are records up-to-date?

Phase 2: Build

Involve the same CRM owner, plus gift officers who own donor relationships

- Based on your audit, decide if you will clean up existing codes or build a new structure from scratch
- Apply consistent coding to historical data where possible — this is the foundation everything sits on
- Map your donor segments to the Donor Stewardship Matrix; who belongs where based on your data?

Consistent data today is a gift to your future self and future staff!

Phase 3: Execute

Involve your broader team: gift officers, Finance, even leadership (depending on org structure)

- Create your coding SOP — we've built a template so this doesn't start from a blank page
- Template includes: code definitions, who enters what, when to update a record, how to handle deleted or modified gifts
- Build your stewardship outreach plan using the matrix as your guide — which segments need what touches, and who owns them?
- Set your import cadence and put it on the calendar so it doesn't slip

The relationship is in the record and the Execute phase is where you make that permanent

Key takeaways

- You can't steward what you can't find
- The Donor Stewardship Matrix gives you a framework for segmentation
    - Your CRM coding conventions give you infrastructure
    - The CRM Stewardship Actionable Guide gives you the path forward
- Scaled stewardship doesn't start with the right tools, the right automation, or the right headcount – it starts with **clean, consistent data**
- For teams looking to scale stewardship, the relationship is in the record

Resources recap

Take these to your next internal team meeting and begin with “Phase 1: Audit”

- Donor Stewardship Matrix
- CRM Stewardship Actionable Guide

- Video: Adding FreeWill gifts and donors to your CRM
- Interested in an API integration? Reach out to your FreeWill Strategist.

Q&A

Thank you.

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