

WELCOME!

Donor Stewardship

While numerous programs and departments go into creating a strong environment for development, stewardship can touch each of them – and be everyone’s responsibility!

Stewardship

Research Public Relations Accountability
Education Records Marketing Appeals

STEWARDSHIP

Sad Facts:

Stewardship is often overlooked
It's easily cut (from priority list and budget)
Some consider it a major-gift-only affair.
Many think it just means saying "Thank You"

Forgotten Facts:

Thank You is one of the first things we learn to say
Stewardship is essential to continued support
Accountability is critical – ∴ so is stewardship
It's for *everyone* that makes a gift
(of money *or* time!).

STEWARDSHIP

Let's look at:

Annual Fund "Gift Pyramids"

Kathleen Kelly's 4 R's of stewardship

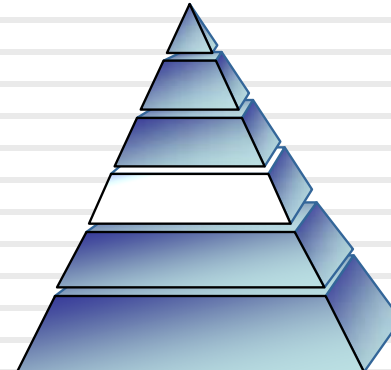
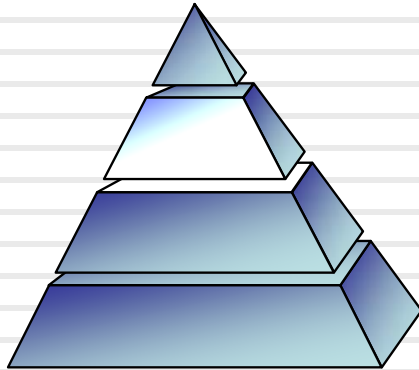
Stewardship, in terms of:

Who	What
How	When
Where	Why

GIFT PYRAMIDS

Many annual funds or development programs have been developed based upon a “gift pyramid” and pushing prospects towards the top of that pyramid.

How do they contribute to how your program approaches stewardship?



GIFT PYRAMIDS

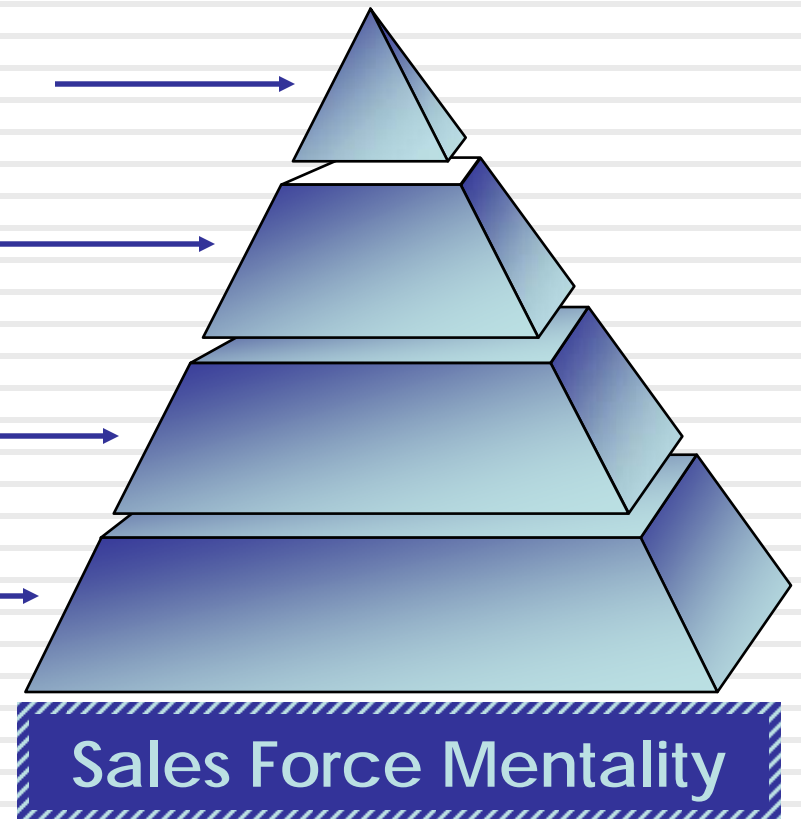
The traditional gift pyramid in fundraising is typically illustrated as a variation of the one below:

Major Gifts: \$100,000 +

Special Gifts: \$10,000 - \$100,000

Mid-Range: \$2,000 - \$10,000

Base Level: \$1 - \$2,000



GIFT PYRAMIDS

Bob Burdinski writes about a new gift pyramid in his book *Innovations in Annual Giving* that is shown below:

Qualified Major Gift Prospects

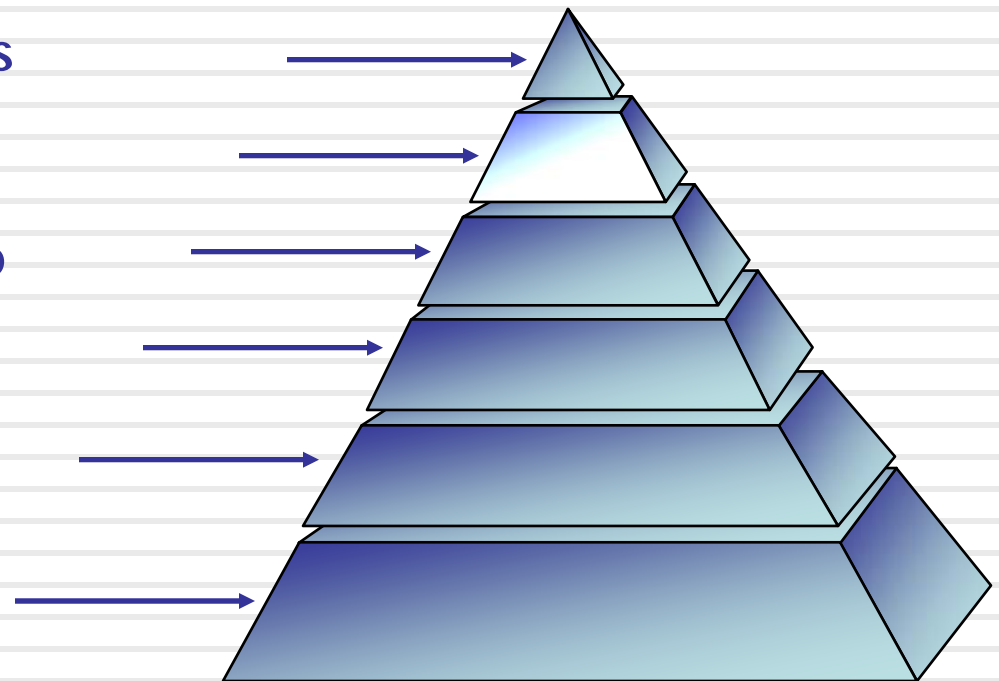
Increased Donor Value

Sustained Giving Relationship

Initial Gift Support

Learned Giving Culture

Ongoing Institutional Affinity



Public Relations Mentality

GIFT PYRAMIDS

The Sales Force Mentality may create greater roadblocks for stewardship – sell the return on investment of future gifts. Normally, this type of leader comes from a major gift background and tends to just think about \$'s.

The Public Relations Mentality should naturally be more open to stewardship, but you should still be able to illustrate its worth (\$) in the long run.

The greatest challenge facing stewardship programs and professionals is getting major gift officers to focus on stewardship. Leadership must make this a priority.

Leslie Kearney
Massachusetts General Hospital

4 R'S

In her articles, Kathleen Kelly, Chair of the Department of Public Relations at the University of Florida and donor relations expert, has provided some depth to the stewardship concept by talking about 4 R's:

1. Reciprocity

Give them thanks and recognition.

It is our responsibility to do what we say we are going to do. We have adopted corporate tools to ensure consistent adherence to organizational policies, procedures and guidelines. All of this improves our stewardship.

Catherine Hogue

The Welfare to Work Partnership, Washington, DC

4 R'S

Kathleen Kelly's 4 R's:

2. Responsible use of Public's favorable action.
Do what you promised when you asked them to Vote, Give, Support, Purchase, etc.

It is our responsibility to do what we say we are going to do. We have adopted corporate tools to ensure consistent adherence to organizational policies, procedures and guidelines. All of this improves our stewardship.

*Catherine Hogue
The Welfare to Work Partnership, Washington, DC*

4 R'S

Kathleen Kelly's 4 R's:

3. Reporting

Transparency on financial and program issues.

Find a way to let them know what happened as a result of their vote, gift, support, purchase, etc.

You don't always know what impact you are making - except maybe when you ask them to do it again - and they do!

Georgia Abbey
Leadership Centre County

4 R'S

Kathleen Kelly's 4 R's:

4. Relationship nurturing

Give them opportunities to be involved in the results they have made possible.

Treat them as partners, not bankers, for the program they support.

You don't always know what impact you are making - except maybe when you ask them to do it again - and they do!

Georgia Abbey
Leadership Centre County

Devin Mathias
AFP Planet Philanthropy

WHO

Who should receive stewardship?

- 1) Donors
- 2) Volunteers
- 3) Employees
- 4) *Anyone* who supports your organization, your goals and your mission

I learned in school how being a donor can be a win-win situation - and I think it's really true. The organization benefits from the donation and continues to work toward their mission, while in the meantime, the donor gets thanked (so he/she feels good about the gift) and should be put on the mailing list to see the good work the organization is doing and to see the contribution their donation made.

Elisa Romans
Virginia Breast Cancer Foundation

WHO

Who should *provide* stewardship?

- 1) Donors
- 2) Volunteers
- 3) Employees
- 4) Leaders in your organization (Board Members)
- 5) Beneficiaries of the donor's/volunteer's support

I learned in school how being a donor can be a win-win situation - and I think it's really true. The organization benefits from the donation and continues to work toward their mission, while in the meantime, the donor gets thanked (so he/she feels good about the gift) and should be put on the mailing list to see the good work the organization is doing and to see the contribution their donation made.

Elisa Romans
Virginia Breast Cancer Foundation

WHAT / HOW

What should you do as stewardship? How do you do it?

There are numerous examples of premiums...

Lapel pins

CDs

Art

Hats/Clothes

Tickets/event

Photographs (at an event, etc)

Luggage Tags

Magnets

Calendar

Puzzle

No one has ever given us their last dollar. It is easier to get more money from people who have already given to your organization. By thanking your donor (at least 7 times) and keeping them educated about how their gift is making a difference, you are naturally moving them towards their next gift.

Amanda Fisher
Morton Plant Mease Foundation

Devin Mathias
AFP Planet Philanthropy

WHAT / HOW

What should you do as stewardship? How do you do it?

If you use a premium, which one to choose is dependent on what you do... it should somehow connect to your organization and your mission. It should serve as a "thank you" as well as a reminder of why they supported you in the first place.

No one has ever given us their last dollar. It is easier to get more money from people who have already given to your organization. By thanking your donor (at least 7 times) and keeping them educated about how their gift is making a difference, you are naturally moving them towards their next gift.

Amanda Fisher
Morton Plant Mease Foundation

Devin Mathias
AFP Planet Philanthropy

WHAT / HOW

What should you do as stewardship? How do you do it?

Communication, as always, is key.

Share newsletters and other print materials with as many audiences as you can.

Highlight your donors and the difference they've made.

Send press releases – free stewardship!

On a personal note, last year I gave to a local non-profit through a payroll deduction at work. Since it was a pre-tax deduction, I nearly forgot that I was giving to this organization. After a while I received a hand-written thank you note from someone at the organization. It meant so much to me that I made a mental commitment to give to them again when the opportunity presented itself. As a reminder, I have kept the note on display in my house and every time I see it I can't help but smile.

Kara Luedtke
University of Wisconsin-Madison

Devin Mathias
AFP Planet Philanthropy

WHAT / HOW

What should you do as stewardship? How do you do it?

Honor rolls

At one time, honor rolls were considered a given for non-profits, but that's no longer the case.

- 1) Pros v. cons
- 2) Costs
- 3) Online v. paper

On a personal note, last year I gave to a local non-profit through a payroll deduction at work. Since it was a pre-tax deduction, I nearly forgot that I was giving to this organization. After a while I received a hand-written thank you note from someone at the organization. It meant so much to me that I made a mental commitment to give to them again when the opportunity presented itself. As a reminder, I have kept the note on display in my house and every time I see it I can't help but smile.

Kara Luedtke
University of Wisconsin-Madison

Devin Mathias
AFP Planet Philanthropy

WHERE

Where should stewardship take place?

Express the impact of your donors' support to them everywhere – mail, phone, email, events, web sites...

Anywhere you can!

The 'thank you' is MORE important than the ask. We even take it so far as to make sure that all of our donors get something handwritten as often as possible.

Kay Young
Wyoming Seminary

WHERE

Where should stewardship take place?

Always think about adding a "Thank You" for your donors in anything you produce... the most common place I see it forgotten is where it should first appear – With the ask! If you use a pledge/gift card to appeal to donors, it should include "Thanks!" somewhere!

The 'thank you' is MORE important than the ask. We even take it so far as to make sure that all of our donors get something handwritten as often as possible.

Kay Young
Wyoming Seminary

WHEN

When do you conduct stewardship?

With the ask

Immediately after the gift

Short delay after the gift

Long Delay (end of year?)

When asking again

It's incredibly important that we show appreciation to everyone who supports us. ChildNet prides itself on being a "Community Based Care" agency and we need support and buy-in from the community in order to be able to start fresh, in terms of public opinion, and to be able to service the abused, neglected and abandoned children in our community. I think one of the best ways to do that is to go out of your way to show appreciation for the people who support you.

Gina A. Ciolino
Communications Specialist
ChildNet, Broward County

Devin Mathias
AFP Planet Philanthropy

WHEN

When do you conduct stewardship?

How about... whenever possible?!?

It's incredibly important that we show appreciation to everyone who supports us. ChildNet prides itself on being a "Community Based Care" agency and we need support and buy-in from the community in order to be able to start fresh, in terms of public opinion, and to be able to service the abused, neglected and abandoned children in our community. I think one of the best ways to do that is to go out of your way to show appreciation for the people who support you.

Gina A. Ciolino
Communications Specialist
ChildNet, Broward County

Devin Mathias
AFP Planet Philanthropy

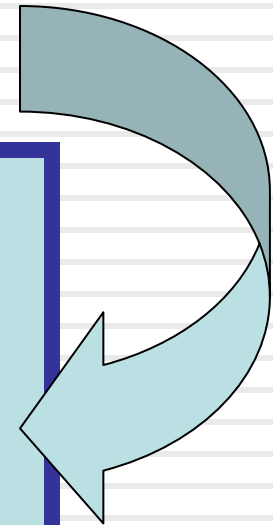
WHEN

When do you conduct stewardship?

Or when your constituents least expect it?

"I am a 1980 grad from the Master's program. Last week I received a letter from the school. I have to admit that I almost tossed it into the shred container, thinking it was another solicitation for donations. I must say I was pleased and genuinely touched that you would take time to express your concern for the alumni here in Florida. I was truly blessed that all was well with my home and family after the devastation of Hurricane Charley. Thank you so much for your kind letter."

University of Alabama School of Nursing at UAB alum after receiving a letter of concern post-Hurricane Charley



WHY

Why should you do stewardship?

Giving "compassionate service" is at the heart of our mission. Saying thank you when a gift is made, whether it's a dinner with the president, naming a building after someone or just sending a thank you postcard, is a *small example to our donors that everyone at the university is actively living its mission.*

Mary DeGrado
Director of Annual Giving
Dominican University

Thank you!
Any questions?

Devin Mathias
Director of The Florida Fund
University of Florida Foundation, Inc.
dmathias@ufl.edu