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

Devin Mathias
AFP Planet Philanthropy
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!).

Devin Mathias
AFP Planet Philanthropy
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
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?
The traditional gift pyramid in fundraising is typically illustrated as a variation of the one below:

- **Base Level:** $1 - $2,000
- **Mid-Range:** $2,000 - $10,000
- **Special Gifts:** $10,000 - $100,000
- **Major Gifts:** $100,000 +

Devin Mathias
AFP Planet Philanthropy
Bob Burdenski writes about a new gift pyramid in his book *Innovations in Annual Giving* that is shown below:

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Qualified Major Gift Prospects
Increased Donor Value
Sustained Giving Relationship
Initial Gift Support
Learned Giving Culture
Ongoing Institutional Affinity
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Devin Mathias
AFP Planet Philanthropy
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 Keamey
Massachusetts General Hospital
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
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.

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

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Georgia Abbey
Leadership Centre County
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 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

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Elisa Romans
Virginia Breast Cancer Foundation

Devin Mathias
AFP Planet Philanthropy
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
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.

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Amanda Fisher
Morton Plant Mease Foundation
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 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

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Honor rolls

If you do an honor roll... Consider recognizing donors for consecutive giving, not just giving amounts.

See Dartmouth example

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University of Wisconsin-Madison

Annual Funds are about annual giving - consecutive giving societies are a perfect way to reward annual giving.

Shelly Smith
Bradley University

Devin Mathias
AFP Planet Philanthropy
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 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 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
When do you conduct stewardship?

How about.. whenever possible?!?

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Communications Specialist
ChildNet, Broward County
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

Devin Mathias
AFP Planet Philanthropy
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
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