

***CASE Annual Meeting of Donor Relations Professionals***

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*New Orleans*  
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*Presented by Julia S. Emlen*

***Essential Tools of Stewardship***

We recognize and maintain relationships with our donors in many well-known and time-tested ways: acknowledgments, endowment reports, events, gift clubs, to name a few. Let's take a closer look at this array of instruments and a few others to see if we can sharpen our approach to bringing donors to their highest level of philanthropy.

### **The Donor Bill of Rights:**

*a blueprint for assessment and action*

- What the donor wants to know and the organization must do to attract and maintain philanthropy
- What the organization must do in response to philanthropy
- How the philanthropist wishes to be treated by the organization

### **The Strategic Plan:**

*a platform for dynamic stewardship*

- Provides a vision of the organization into the future
- Describes the priorities for fund-raising for the period of the plan
- Creates structure and vocabulary for the case for support

### **The Giving Pyramid:**

*a way to focus on rising donors*

- Creates a snapshot and a history of individual giving
- Reflects the propensity for other important donor behavior
- Provides a framework for designing stewardship programs

## Essential Tools of Stewardship

### **Committee Structure:**

***Creates the horizontal context for stewardship***

*Stewardship Working Group*

*Strategic Communications Committee*

*Strategic Solicitation Committee*

*Gift Acceptance Committee*

- Outlines a structure for integrated stewardship
- Identifies instruments for institutionalizing stewardship
- Prepares the foundation for measuring outcome

## Essential Tools of Stewardship

### **Job Description:**

***Locates your work within the organizational structure***

*Build Trust*

*Manage Relationships*

*Deliver the Message*

- Formulates areas of work to simplify understanding of role
- Generates flexibility for job expansion and redirection
- Creates opportunities for measuring outcome

## Essential Tools of Stewardship

University XYZ seeks an energetic, detail-orientated professional to launch a new stewardship program. Reporting to the Director of Alumni and Donor Relations, the Assistant Director is responsible for developing and executing activities to cultivate and sustain ongoing relationships with donors.

- Assist in planning and staffing exclusive events for top-tier and VIP donors, including private banquets, celebrity events, building dedications, and receptions.
- Prepare and edit high-level donor communications such as donor update letters, messages from the president and deans, electronic newsletters, and an annual honor roll of donors.
- Oversee the design and creation of a donor-relations web site that showcases donors and fellowship recipients and demonstrates the impact of giving.
- Meet regularly with the deans of the university's eight academic schools to develop and implement strategies for school-based stewardship activities.
- Develop reports on donor giving and stewardship outcomes for use by prospect managers
- Manage the gift acknowledgment and tracking process at the university, ensuring that gifts are appropriately recorded and that donors receive timely and appropriate acknowledgment.
- Oversee the named fellowship process at the university, closely collaborating with the Office of Financial Aid, development directors, and academic programs to ensure that fellowships are awarded and donor reporting requirements are met.
- Secure biographical information and letters of appreciation from student fellowship recipients to share with donors.
- Compile and maintain an accurate and detailed log and archive of named fellowships.
- Develop guidelines and maintain a log of donor-recognition gifts. Oversee the design and acquisition of personalized donor recognition gifts for special events.

## Essential Tools of Stewardship

University XYZ seeks an energetic, detail-orientated professional to launch a new stewardship program. Reporting to the Director of Alumni and Donor Relations, the Assistant Director is responsible for developing and executing activities to cultivate and sustain ongoing relationships with donors ***in order to bring them to their highest level of philanthropy.*** Duties include the following:

- **Inaugurate a program of stewardship, based on an assessment of the current program, using the donor bill of rights. Measurement of outcomes from program components will be an important part of the role of the assistant director, with resulting recommendations and revisions of the program.**
- **Design a program that relates to the fundraising priorities, derived from the organization's strategic plan. Success of the program will be measured against the giving pyramid and the impact of stewardship activities on the philanthropy of donors.**
- **Periodically review the state of stewardship at the university, as related to implementation of the donor bill of rights. Revision of the program will be based on the outcome of the assessment.**

## Essential Tools of Stewardship

### RESPONSIBILITIES

#### **Message Delivery: Coordinate important fundraising messages within the gift pyramid to determine the best method of communications for groups of donors**

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## Essential Tools of Stewardship

### RESPONSIBILITIES

**Relationship Management: Develop initiatives for reaching out to specific groups of donors and implement them in collaboration with deans and directors of the schools and programs**

- Meet regularly with the deans of the university's eight academic schools to develop and implement strategies for school-based stewardship activities.
- Develop reports on donor giving and stewardship outcomes for use by prospect managers

## Essential Tools of Stewardship

### RESPONSIBILITIES

**Trust Building: Develop, as needed, and apply gift-acceptance policies and procedures, and work with a gift-acceptance committee to regularize attention to donor details and to identify opportunities for special stewardship.**

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### **A Principled Approach to Stewardship**

The entire non-profit organization is responsible and accountable for its philanthropic support; therefore, all staff must engage in stewardship.

Stewardship activities must be sustainable; therefore, stewardship responsibilities must be managed throughout the organization.

The cost of stewardship activities must be assessed according to their impact on giving; therefore, stewardship activities must be evaluated in terms of outcome rather than output.