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Intentional Stewardship

CASE Annual Meeting of
Donor Relations
Professionals

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Be in touch. . . .

Workshop leader for sixty minutes

Faculty friend forever. . .

*All questions asked in workshop
answered by email this week*

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What is intentional stewardship?

Basic question: how to design
and implement a program
that brings donors to their
highest level of philanthropy

What is stewardship?

The obligation an organization assumes when it pursues and accepts the philanthropy of those who respond to its mission and core values

What do we want donors to do?

- 1. Give regularly**
- 2. Give to the priorities**
- 3. Give in usable ways**
- 4. Give to capacity**
- 5. Feel recognized**
- 6. Agree to participate**
- 7. Spread the message**
- 8. Bring others along**

How does the organization elicit these behaviors?

- A well-developed current-use, endowment and capital fund-raising program that is based on the organization's strategic plan

encourages prospects to give regularly

How does the organization elicit these behaviors?

- A gift-acceptance mechanism that is founded in the organization's financial operations

--encourages prospects to give in usable ways

How does the organization elicit these behaviors?

- An acknowledgment program that delivers an appreciative, timely and accurate response to a gift, and an annual report that describes how gifts have been used

*--assures that donors **feel recognized***

How does the organization elicit these behaviors?

- A committed, competent fund-raising staff that represents the institution to the prospects, and in turn learns their preferences, interests and inclinations

*--moves prospects to **give to capacity***

...elicit these behaviors?

- A strong alumni/ community relations/communications program that provides outreach, networking, and timely information about the organization creates a desire to belong

--assuring that prospects agree to participate

...elicit these behaviors?

- Well-articulated, substantive and meaningful volunteer opportunities

*--increase the chances that prospects will **bring others along***

...elicit these behaviors?

- A strategic, multi-faceted communications program provides the foundation for fund raising by presenting annually the case for support, making it easier for prospects to

--know the priorities and spread the message

How can stewardship be organized to promote donor behavior?

1. Activities that build trust
 1. Information management
 2. Production based
 3. Message informed
 4. Policy based; procedural

How can stewardship be organized to promote donor behavior?

2. Activities that manage relationships

1. One to one
2. Brings the organization to the donor; vice versa
3. Data mining to green the prospect pool

How can stewardship be organized to promote donor behavior?

1. Activities that deliver the message
 1. Interpret priorities and mission into case for support
 2. Volunteer management
 3. Basis of events