The Case for Stewardship:
Bringing Your Donors to Their Highest Level of Philanthropy

Women in Development Boston, Mass. June 6, 2005

Thank you for inviting me to speak with you today. I actually spoke before this group about seven years ago. Marsha Novak, from Boston University, signed me up to give a talk that I entitled “Stewardship by Design.” My thinking about stewardship was in its early days then and in the intervening years, I’ve done a lot more thinking.

I’m here today not to place before you answers or directives about what to do for stewardship, but to engage in a conversation with you about how to think about stewardship. We’ve already had a quarter century of task orientation to stewardship. It’s time to embark on twenty-five years of managing stewardship as the foundation of philanthropy.

The notes you have before you give you the salient points of my talk. I encourage you to doodle your questions on the pages as I get to that section in the talk so that we can have a lively discussion of these ideas in about twenty-five minutes.

On to the Future: 2030

Slide 1

To survive and flourish, an organization must engage a significant group of enthusiasts who are passionately committed to supporting its mission with their wealth, wisdom, and work. That passion is based on a relationship between the individual and the institution which must be sustained. Relationships built between individuals and the institution are made permanent through a program of recognition, engagement, and communications that encourages regular involvement and giving to the highest priorities of the institution.

This mission statement for stewardship and donor relations was written in 1996, and has been used in various forms by a number of organizations to describe their stewardship vision and as the basis for developing their programs.

The important concepts in this mission statement are *institutional mission, relationship*, *recognition, engagement,* and *communications* as program elements*;* and *involvement* and *giving to the highest priorities* as donor responses. You will notice that it does not contain the words stewardship or donor relations.

We know that *institutional mission, relationship, recognition, engagement, communications* are the foundation of stewardship, but how do we know that they are critical for the life of non-profit organizations and essential in helping donors realize their greatest philanthropic capacity? It seems to me that this is the question before us as we try to make the case for stewardship.

To really understand the importance of stewardship to both non-profits and donors, we must give ourselves a little perspective. To get that perspective and in honor of WID's twenty-fifth anniversary, I invite you to join me on a trip to the future—2030, to be exact—when stewardship and its bejeweled cousin, donor relations, no longer exist.

You may ask, What happened?

The story of stewardship and donor relations over the last twenty-five years, that is to say, from 2005 to 2030, is complex, and I will spend some time taking you through the various happenings along the path that has led to this day—in 2030—when I can make this announcement about the disappearance of stewardship and donor relations.

Slide 2

There Is Only Stewardship

For now, let us be content to realize that by 2030 stewardship and fundraising have become synonymous. The condition today, in 2030, is the final realization of what we used to say in the early days of the twenty-first century: "There is, and has only ever been, **stewardship**."

That fact has finally caught up with conventional non-profit wisdom, so that now when we say stewardship, we mean fundraising; and when we say fundraising, we mean stewardship.

Para 1

Let me elaborate. In 2030, a separate unit charged with stewardship and/or donor relations has lost its currency because non-profit institutions, to a person, have embraced the centrality and primacy of stewardship and donor relations. Every day, every person connected with a non-profit organization is actively, consciously engaged in stewardship and donor relations.

Para 2

The reciprocal is true as well. Not only are staff members who are employed by non-profits inculcated with the value of stewardship in their conduct toward prospects and donors, donors too consider themselves stewards of non-profit organizations, actively committing time, talent, and treasure to a degree sufficient to secure the maintenance and expansion of their favorite charity. This reciprocity has simply absorbed stewardship and donor relations as a fundamental tenet, removing it as a separate category or department.

Para 3

Furthermore, the traditional steps in fundraising, called *moves management*—identification, qualification, cultivation, solicitation, and stewardship—have collapsed into a single notion of philanthropy management**.** *Over the years as this change took place, the big fish in this absorptive process was stewardship*. Now, in 2030, the give and take between non-profit organizations and donors is categorized as philanthropy management, which describes the two sides brought together for the common good.

Think about this: Philanthropy management—not development or advancement. In 2030, our vocabulary is focused on the **relationship** between donors (who own the philanthropy) and on **institutions** (that seek to develop or advance). Philanthropy management is the convergence of *those with resources and heart, together with those with a mission, a program, and access to beneficiaries*.

Para 4

To those of us who have served as historians and observers of this quarter-century phenomenon, the greatest irony is that fundraising was not renamed stewardship some time around 2015. We thought that might be an intermediate step on the way to philanthropy management, because stewardship is a process—maintaining and expanding philanthropic support for causes that better humankind; while fundraising is a task—asking for money**.**

In 2030, we look back on the polarization of stewardship and fundraising as quaint, but almost fatal, to the non-profit enterprise. We are astonished to reflect on a time, twenty-five years ago and beyond, when fundraising was pre-eminent. *We find it difficult to comprehend that once upon a time stewardship and donor relations were seen as back-office activities.*

We prefer to take the long view (and the high road). Looking back, say, to 1980, we note that stewardship and donor relations did not really exist then either, except in very rudimentary, voice-crying-in-the-wilderness fashion. Really, until almost the turn of the twenty-first century, stewardship and donor relations were staffed by pioneers, stationed on the lonely frontier of organizations that paid minimal concrete, measurable attention to the needs of their donors.

I have a lot to tell you about how this all happened, but do know that the transformation from institution-centered stewardship to donor-institution cooperation as philanthropy management came about because of the efforts of people in stewardship and donor relations. Each of them, and presumably, you in this audience, made the case for stewardship.

Slide 3

How Did We Get to Philanthropy Management?

Enough of my ramblings on small issues, perceptions, interpretations, petty grudges, I-told-ya-soes. I know that you want to hear about how all this happened and I'm sure you want to know what philanthropy management (wink, wink—stewardship) looks like in 2030. I have made the forgoing comments to help you see that over the last twenty-five years, a lot of work has been done to engage and integrate donors with the causes they care most about. And to organize non-profits to more fully play their part in securing support through cogent articulation of their mission and appropriate conduct toward their supporters.

Without further ado, here's what happened. (Please note that I've been warned about a phenomenon commonly referred to as the Butterfly Effect, so as I proceed, I'll give you approximate years in which things happened, and I'll have to be a little vague in describing events that occurred, for the protection of your future.)

Fundamentally, four forces came together, over time, to realign fundraising and stewardship into the non-profit—donor tandem we today call philanthropy management. These are not presented to you in any sequence or chronology. They are actually intertwined, occurring simultaneously, concurrently, and synergistically. I've separated them for purposes of discussion. Just remember that they are happening around you now and will build in intensity over the years.

The four elements are as follows:

1. The availability of sophisticated, low-cost, desk-top information-management systems
2. Introduction of rigorous, outcome-based non-profit management methods
3. A rising tide of donor dissatisfaction with non-profit business practices; and a realignment of donor aspirations for their philanthropy
4. A growing interest among social scientists in conducting research on donor interests, responses, and inclinations, and to

measure the success of fundraising methods

Para 1

- **First, low-cost, sophisticated technology**. I know that most of you are now engaged in introducing or converting to software systems that support the accumulation of vast amounts of information about prospects and donors. From 1985 to 2015 or so, there was a rush to build the best technological mouse-trap with special fields for stewardship. The software companies have been making a fortune. The issue that was not resolved easily was how to get the information back out of the databases in some way that was actually helpful in stewardship work. Unfortunately, <u>while technology has been presented as the way to render the work of stewardship and donor relations more efficient, it actually has lead to requests for more staff, more support</u>, because with technology available, you have felt emboldened, and have been encouraged, to do more. In fact, technology has sometimes meant an increase in the cost of a dollar raised rather than the opposite.

Additionally, <u>over the years, as campaigns have become continuingly and increasingly successful, there are more donors to be stewarded—more funds on which to write reports</u>. In about 2015, a certain computer genius develops a suite of reports that work on all the systems—Banner, Advance, Raiser's Edge, a few new systems that are cheaper and more user-friendly, etc.—so that data collation into usable reports will have advanced significantly.

This will be a watershed time for stewardship. Stewardship officers realized that endowment report generation was really an issue of clean, accessible data being graphically formatted. They pressed for the collaboration between information technology and communications with the result that a new way of reporting to donors was developed that relied on data manipulation and graphic presentation to promote message delivery. By 2017, data management and mass report generation were no longer part of the stewardship portfolio.

(As an aside, I want to mention a bit of pre-history in donor relations and stewardship. In 1993 or so, and continuing for about twenty years, until 2010, *desktop databases were embraced by stewardship officers as the way out of the index-card jungle*. Maybe some of you here today, in 2005, don't remember the days of color-coded note cards and file folders and marking pens that flourished before 1993 as the basic tools of stewardship and donor relations. If those of you who only know FileMaker Pro or Fox Pro or Access databases as information systems supporting stewardship—or even Advance or whatever else in the software world has come up with large, integrated systems—would try to think about removing all that information from the database and writing it on index cards, then sorting the cards, cross-referencing them, and storing them in file boxes, you can get a sense of what stewardship and donor relations was like from 1960 to around 2000.

If you can throw your mind back to picture your office in 1989, surrounded by index-card boxes, then perhaps you can conceive of the progress you will make in 2010, 2015, 2020, etc.)

• **Second, introduction of outcome-based management.** Generations of Business School graduates have cut their teeth on various

Para 2 theories of management that emphasize measurable objectives as the basis of profitability. Non-profit organizations escaped these trends for a few decades into the twenty-first century. Graduate programs in non-profit management, however, made available to institutions an increasing number of business-trained executives who incorporated theories like TQM, Accountability Planning, ROI, etc., which placed a premium on effectiveness and efficiency. Between 2010 and 2020, almost every non-profit went through an eff/eff (effectiveness/efficiency) audit process that looked for ways to spend agency money more wisely and achieve greater results. These studies included time-motion studies, workflow studies, work distribution studies and vertical integration studies. By 2010, WID begins to offer conferences on conducting these efficiency/effectiveness audits.

I regret to inform you that in this management trend, stewardship and donor relations were among the most heavily sanctioned departments. Budgets for all stewardship and donor relations activities were slashed. This was reminiscent of the kind of staff reductions that were standard practice in the 1990's, as a factor in reorganizing after large campaigns. There is much more to this part of the story, so before your chins hit the tables, I'll tell you now that stewardship and donor relations staff were well ahead of this curve.

At the same time development services units sustained loses, solicitation departments came under scrutiny, and the role of fundraisers was changed to include many of the things that had traditionally been carried out by stewardship staff. Many of those in stewardship and donor relations took advantage of this realignment and accepted reassignment as solicitors. In their new roles, these stewardship/solicitors were highly successful, bringing the lessons learned as stewardship staff—such as relationship management, the habits of detail orientation, and a broad knowledge of their non-profit—to the task of solicitation. (By the way, this event also nailed down solicitation staff and reduced the incessant job-hopping of gift officers. The presence of a stable solicitation workforce with a broader, deeper skill set, was transformational in the movement to philanthropy management.)

There was synergy between the technology transition I mentioned before and this new era of outcome or accountability management. Here is where the attention to detail and the devotion to donors, which are characteristic of those in stewardship and donor relations, paid an additional professional dividend. Here's what happened.

Stewardship and donor relations officers looked at this trend toward outcome-based management and decided to apply outcome standards to the donors. As thoughtful, program-based employees, stewardship and donor relations officers could easily comprehend the management theories. As keepers of elaborate databases packed with information on donor habits and preferences, etc., they had the information available to test donor responsiveness to the mission of the organization. Just as they themselves had been subject to managerial scrutiny about responsibility and accountability, they began to ask the question, **"Which donors have been accountable to the non-profit organization?"**

(By the way, in about 2007, the trend to survey donors for their responses to stewardship hit a wall when it became obvious that the surveys were measuring response to tasks rather than determining changes in donor behavior through stewardship. This effort to understand donors' intent didn't go away, but it became more strategic and focused on moving donors to their highest level of giving.)

In the early twenty-first century, a core of stewardship and donor relations thinkers had developed eight outcome behaviors that they believed covered the bases in defining the donor who was accountable. In other words, if donors did these things, then they were fully supportive of the organization. Furthermore, the non-profit organization needed to be aligned in ways that promoted, inculcated, extracted, and rewarded these behaviors in donors. The more that the donors acted in these ways, the more philanthropically accountable the donors were. The more that non-profits operated to develop these donor habits, the closer donors came to the organization, becoming life-long donors. Here are the outcome behaviors:

The donor who is accountable:

1. Gives regularly
2. Gives to the priorities
3. Gives in usable ways
4. Gives to capacity
5. Feels recognized
6. Agrees to participate
7. Spreads the message
8. Brings others along

By 2022, three things were happening in response to this codification of accountable donor behavior:

1. Stewardship/donor relations officers became ambassadors for donor relations because responsibility for promoting many of the behaviors already existed among various departments, such as accounting, communications, public relations, etc. Ambassadorship had an impact.

    a. In conjunction with new management practices, ambassadorship led ultimately to redistribution of stewardship work

b. As new units and offices embraced stewardship, they moved closer to the realization of philanthropy management, superseding a separate stewardship department

c. Within a few years of ambassadorial practice, stewardship officers had more time to engage in more focused activities related to promoting accountable donor behavior

2. Within their vast databases, stewardship and donor relations officers began to look for donors who already exhibited all or a majority of the behaviors, leading to

   a. segmentation of stewardship by outcome behavior rather than solely by number, size, or allocation of gifts

   b. program development to elicit these behaviors (for instance, gift clubs) were now based on the behaviors, not exclusively on gift size, category or accumulation

   c. active engagement by stewardship and donor relations staff with volunteers to extend and promote the behaviors became the norm

3. As stewardship and donor relations officers turned their attention more and more to working with colleagues and with smaller donor segments, they found it expedient to relinquish the last ties

to endowment report generation, which was now well in hand between IT and communications.

▪ **Third, a rising tide of donor dissatisfaction with non-profit business practice and realignment of philanthropic intention**. Factors one and two above related to things happening within the organization; factor three relates to the donors themselves. Of the four elements in the emergence of philanthropy management, the change in donors themselves is the most complex. Therefore, I'll consider it in three sections.

Para 3, pg 4

First: The publication by CASE and AFP of The Donor Bill of Rights signaled an increasing concern among non-profits to delineate the rights of donors as they engaged in the voluntary activity of philanthropy. The Donor Bill of Rights became the philosophical basis of many emerging stewardship and donor relations programs. As a matter of fact, the Donor Bill of Rights was used by stewardship and donor relations directors to press for reallocation of responsibilities back to gift accounting and IT as the directors sought to find more time to engage in the outcome-behavior management that I mentioned before.

Just to summarize, I can tell you that the directors found that the Bill of Rights created a contract between organizations and donors in three areas:

1. What the donor needs to know and how the nonprofit needs to

provide it, resulting in a much narrower description of the stewardship function and activities

2. How the organization must respond to philanthropy, thereby laying out in exact terms the boundaries of stewardship

3. The realization that philanthropy is always a personal relationship, which led to a refinement of institutional behavior overall and inoculation of the entire organization into the ways of philanthropy management

Second: A number of very difficult donor relations situations arose early in the twenty-first century and these had a profound effect on non-profit management. I won't get ahead of 2005 in describing some of the more difficult situations that occurred, but here are three examples.

1. the return to the donor of a ten-figure gift by a major university
2. a suit against a major university for waiting nine years to fill a professorship endowed with a gift of $2 million from a family trust
3. a Federal investigation of a $50 million gift of musical instruments to a national museum over the value and authenticity of the gift
4. a suit brought against a museum which sold priceless artifacts directly related to its mission in order to pay operating expenses (icon sell-offs have generally been problematic)

Some of these cases were significant enough to make the headlines, but infractions of donor trust and non-profit authenticity at lower levels also have occurred: scholarships unable to be awarded, or awarded inappropriately; endowments misused due to lack of clarity or communications concerning restrictions and preferences. Even cases in which institutions have reassigned endowments at the request of descendents at the death of the donor. I'm sure that many of you can come up with examples.

Needless to say, non-profit organizations had to respond to this ethical crisis with greater management accountability. Non-profit executives moved gift-agreement development and oversight away from stewardship and donor relations into the central budget and finance offices where the responsibility had really always resided. You can see how this and the rise of outcome management worked together to change the stewardship scene. Let me say, however, that non-profits were arrogant in the slowness of their response to these ethical lapses. However, when they did respond, it was again a watershed time for stewardship and donor relations. Basically, all the things that you had been doing to promote the integrity of the donor-institution relationship emerged as critical and were taken from the advancement departments and integrated into the executive fabric of the organizations, for example:

1. Fundraising priorities became the responsibility of the president's office of strategic planning. (You participated in these meetings

to assist in coordinating the priorities with gift opportunity language.)

2. Rules for gift-acceptance policies and procedures were regularized and centralized in the fiscal administrative offices of non-profits. (You led the way on this.)

3. Gift agreements were also regularized and drafted by the controller and legal counsel; promises of specific stewardship activities were removed from them. (You fought the latter, but eventually realized the benefit, and helped re-craft older agreements.)

4. Endowment fund reporting and fundraising reporting, like donor recognition books, became part of the PR/communications responsibility of the non-profit, not the development office. (Again, you had the information and the track record, so you were the teachers in this realignment of work. Eventually, the more labor-intensive and costly types of recognition were abandoned—in about 2010.)

A huge chunk of work traditionally considered stewardship and donor relations drifted away from development and stewardship offices at this time—maybe in 2012. Those in stewardship and donor relations led the way, turning over this production-management work to newly educated public relations offices and controller's offices.

I know that you may be becoming anxious about what this all means for careers in stewardship and donor relations, but bear with me, because really all the news is good.

The timing of this movement away from production-management, mass-mailing work was propitious, because it coincided with the rise of donor outcome-behavior programming, when staff needed the time and resources to concentrate on those donors who had the greatest potential for supporting the organization.

At this moment, stewardship and donor relations changed from post-gift care and feeding of donors to a program focused on bringing donors to their greatest philanthropic potential. Staff carried out this work as solicitors and in a number of other arenas, but usually not within a unit called stewardship and donor relations. Institutional constraints in the form of bureaucracy fell away from stewardship work. In moving forward in this focused, highly significant work, most stewardship staff were moved into the vice president's office (or other executive office) where they enjoyed greater credibility for their work.

Looking back, it has become clear that while the energy for this transformation from stewardship to philanthropy management came from stewardship staff, the leadership had to be exerted from the executive level—vice presidents and presidents.

Third: From 1990s on, donors began to consider ways that they could give all their money away before their deaths. In this effort, donors began to form associations to refine their philanthropic concerns, to learn more about how to be philanthropic, and to network with others who had like concerns. Very smart entrepreneurs formed donor-education non-profits or became donor advisors (to go with those donor-advised funds). These organizations and advisers operated essentially as private, extramural stewardship officers. Some of you and your colleagues eventually moved into these private roles, and have been very effective in promoting philanthropy. The opportunity to become private practitioners of stewardship and donor relations opens in about 2009.

At this point we have achieved greater efficiency due to technology, better management, and angry or reengaged donors. But how did stewardship and donor relations become more effective?

Para 4, Pg 4

- This brings us to the **fourth** element, a growing interest among social scientists in conducting research on donor interests, responses, and inclinations, and to measure the success of fundraising practices**.** In 2005, there are thousands of non-profits operating in the United States. Philanthropy is a huge business. Professionals in marketing and in social science in general—sociologists, economists, business administration professionals—took notice, and began in the late twentieth century to apply their research tools to the question of whether and how non-profits actually accomplished their organizational missions. The arena for much of this research, especially in marketing, was in areas traditionally considered stewardship and donor relations.

Acknowledgment, in particular, came under intense research as business school professors and their graduate students and freelance researchers surveyed and measured and tested the effectiveness of the very tangible, narrowly focused, low-cost element of acknowledgment. In 2005, most of this research is just budding, but I can give you a glimpse of a few things that will be suggested by the research on acknowledgment:

1. as measured by their continuing and increased giving, donors are more responsive to a letter from a program director or service provider expressing appreciation than they are to receiving a pen, a mug, or a bookmark

2. in large surveys, donors consistently referenced personal acknowledgment as more important in influencing their future giving than having their names listed in a publication, being invited to a party, or receiving a trinket; this recognition included personal calls as well as handwritten letters and visits

3. gift giving and gift acknowledging influence directly the quality of the donor-recipient relationship, especially if the donor is assured

by an individual of a direct outcome from the gift

Needless to say, the impact of this research, along with the other elements of technology, better management, and donor dissatisfaction, was dramatic. By 2018-2020, stewardship and donor relations had moved to a new level of functioning. With the spirit of stewardship imbued in the work ethic of all non-profit staff, this transition was a cause for celebration among stewardship and donor relations officers—a success in their effort to realize the essence of donor relations. Here are some of the specific things that happened by 2020 for those engaged in stewardship and donor relations, which had a direct impact on effectiveness.

1. The production-oriented work that used to consume so much stewardship time and resources has simply disappeared from the stewardship portfolio and been moved to areas in the organization where production management and message delivery are far more efficiently and effectively managed—IT and communications

2. Some stewardship staff moved into solicitation work

3. Gift agreements and gift acceptance are managed by the chief program and fiscal officers

4. Other stewardship staff followed reporting management over to communications and PR, working in tandem with IT

5. Some became private stewardship consultants for donor-advised funds

6. Another group embraced the part of donor relations that has been the subject of social science research, focusing on smaller segments, dynamic programming, writing letters and special proposals; this group actually functions like the private stewardship officers for donor-advised funds, but within the non-profits

7. Interestingly, stewardship and donor relations officers in universities with business schools took the opportunity to test the outcome behaviors in relation to their own donors and donor programs and a significant group of donor relations and stewardship officers went on to complete business degrees in marketing and came back into philanthropy management at executive levels, overseeing communications and IT efforts, as assistant and associate vice presidents.

Leadership in the Philanthropy Management Movement

I've talked this afternoon about the emergence of the pre-eminent concept of stewardship in philanthropy; about that concept as the description of the tandem efforts of donors and non-profits to realize a vision of philanthropy. Personal financial resource and a heart for a cause meet vision, mission, and the arena of the beneficiaries—that is philanthropy management; that is stewardship in 2030.

But who led the way? Who made it possible to think in new terms, to take the risks that are so inimical to a bureaucracy? Who saw the wisdom in knocking down the boundaries between departments in order to achieve the aggregate mission of bettering humankind? Who was willing to develop the craft, to fix the broken stuff, to give up turf, territory, to move on to new challenges and opportunities?

In 2005, those engaged in stewardship have been resolute in renewing, redesigning, realigning stewardship because of their commitment to help donors be their most philanthropic. The combination of devotion to donors and fastidiousness, pickiness, attention to detail, to data acquisition and use—is unique, and will make the difference in the quality and integrity of philanthropy in the future.

How is this possible? Let me give you a mundane example. Let us just consider stewardship and technology. What were the basic things that our stewardship ancestors accomplished by driving the technology train? First, they introduced labor-saving practices through the application of technology. Second, with the free time and the robust tools, they enriched and extended their programs. Third, they began to analyze what was in those databases and actually force non-profits to redistribute data management to offices and units where it was more appropriately managed—the controller's office, gift accounting, IT, communications.

And fourth, with their freed time, they began to focus on bringing budding philanthropists along.

Another example centers on the willingness to try new things, to reach out to colleagues to explore different ways to steward donors. In the early days, unfortunately, most of this exploration was carried out through benchmarking. This led many departments to simply replicate the output achieved by other organizations deemed similar in mission, size and function. As a result, everyone had a unit-based program for scholarship stewardship, which included a written report, a luncheon, and letters from scholars to donors. The similarity of stewardship and donor relations programs across higher education was striking.

The pitfall here is that none of the work was attached to outcomes related to donors. That might have remained unchallenged if our stewardship predecessors had not begun to ask for additional staff to contend with the rising volume of work. With executive insistence on growing solicitation staff rather than stewardship staff, stewardship staff quickly moved to begin to define programs in terms of outcome and to create connections with other offices that were better placed to do the work that would have been done by additional staff. Stewardship officers proved to be internal relationship managers.

The Stewardship Officer in 2030

By 2030, many stewardship officers active in 2005 had retired; many more had moved on in the early years of the century to other positions or other careers. What will be the stewardship legacy twenty-five years from now, in 2055? Who will be the professional descendents of stewardship officers? What will they be called? What will they be doing? We've already reviewed the many directions that will open up for stewardship and donor relations officers.

A small but critical group will be focusing their careers on acknowledgment and recognition. Their work will be derivative of the donor outcome behavior research, and will concentrate on their organization's rising benefactors. Here's the lineup:

1. One associate vice president for prospect development
    a. Working in association with the senior philanthropy management executive and the president to concentrate on moving a small and changing group of donors to their highest level of philanthropy
    b. Writing letters, calling, and visiting rising donors

Slide 4, Pg 5

2. One director of prospect development research, who coordinates between gift accounting, IT, and research to identify the organization's the rising donors, those who are exhibiting a few or some of the donor outcome behaviors
3. One director of prospect development communications, who will

put together small, targeted events and manage the highest level gift club

Getting from 2004 to 2029

I've given you lots of information about what is to come in the world of stewardship. Let me give you some specific advice for these early years of career development in philanthropy management, especially if you are interested in stewardship and donor relations.

1. Begin to measure the impact of your work on philanthropy outcomes. You can use those behaviors I mentioned and begin to see if the donors you are attending to are actually continuing to be philanthropic to your organization. Does the scholarship letter produce another substantial contribution? Are your donors investing in the annual fund? Within six months of an event, how many donors make a pledge or write a check? Does the gift club encourage participation and increasing gifts?

Slide 5, Pg 6

2. Question whether something you are doing would be better done in another department, especially one in which labor is cheaper. Do department rules and regulations, procedures and traditions interfere with relationship management? Are you providing quality control for gift accounting and bio-records? Are you recreating a communications department when one already

exists in your organization?

3. Concentrate your work on building trust, managing relationships, and delivering the message. Does the volume of work you must complete prevent you from thinking about its value relative to the donor's commitment? Does your work involve both bean counting and creative, innovative problem solving? Are you able to determine which type of work you prefer?

4. Develop a core skill stewardship set, especially writing. Do you have to have your written work reviewed and revised by colleagues and supervisors? Is your writing improving? Are you seeking ways to enhance your writing skills?

5. Be open to the possibility of moving to the next exciting opportunity. Are you observant of ways to transfer your skills to other areas of philanthropy management? Are you as aware of your own job satisfaction as you are of the needs of your donors? Are you using department planning sessions to think about ways to innovate, renovate, recreate?

6. Take advantage of all the resources available to help you build your career and to find the career path that it most attractive to you. Look into WID, CASE, ADRP, AFP, or other organizations that might be particular to your non-profit work. Follow your instincts in choosing conferences to attend; make lots of friends

and stay in touch with them.

This group of participants here today represents a range of players in the non-profit and stewardship scene. I want you to know that those who work in stewardship and donor relations are among the most productive in philanthropy management. Their efforts will be recognized increasingly in the next twenty-five years.

So, from the year 2030, I bring you all kind regards and heartfelt appreciation, especially to those in stewardship, for the work you are doing and will do to bring us to a new era in philanthropy. Thank you.