

Strategic Stewardship for Major and Principal Donors | 01.24.2017

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Please find a list below of additional resources from the “*Strategic Stewardship for Major and Principal Donors*” webcast. If you wish to print only certain resources, you may click their respective links to jump directly to them in the packet.

Pre-Webcast Resources

1. [Sample Report & Plan](#) – Pages 2-4
2. [What you should know about your donor](#) – Page 5 – one-page document showing the things to know about your donors from the “Deep Dive” section of the webcast (slides 32-35)

Leaving a lasting mark on higher education

Strategic Stewardship for Major and Principal Donors

Sample Report and Plans

Prospect Name: Bell Canada				Date: March 8, 2010		
Primary Volunteer:				Staff Assigned:		
Secondary Volunteer:						
Capacity Rating:						
Total Giving to PW:				Other Giving		
Date	Amount	Date	Amount	Date	Organization	Amount
Current Relationship/Background						
Account Strategies						
Pathways Strategy:						
Proposed Gift						
Amount						
Purpose						
Solicitor						
Solicitation Date						
Past Recognition						
▪						
Potential Donor Issues				Research Questions		
▪						
▪						
Strategies to Address Research				Who		By When
Key Events & Dates (decision dates, proposal date, board meeting, etc)						
Event				Deadline		

Engagement Opportunities

Initiatives/Engagement Opportunities	Person	By when	Expected Results
Site Visit			Awareness raising.
Pathways 2009 Gala		Oct 2010	Sponsorship and/or table purchase
Meekison Party			Donor stewardship or prospect cultivation
Alumni Networking Reception		June 2010	Mentoring/networking event for students and corporate supporters
PW Conference		June 2010	Career building for students; volunteer opportunity and brand recognition for corporate supporters.
Cocktail Reception		May 2010	

Date Plan Created:

Donor Relations Team:
UCSD Leadership/Faculty contact:

Donor Information

Donor Name(s):	Areas Supported:	Notes:
ID #(s):		
Birthday(s):		
Anniversary:		
Family:	Main Areas of Interest:	

Standard Donor Engagement and Stewardship

Reports	Event Invitations	Communications
Financial Endowment Report (fall)	Founders' Day	Chancellor Birthday Card
Scholarship Recipient Letters	Lawn Party (donor appreciation event)	Chancellor Holiday Card
Lifetime Giving Impact Report	Hearts and Scholars Dinner	@UCSD
Other: Click to enter text.	Other: Click to enter text.	UCSD E-News
		Other: Click to enter text.

Engagement Plan

Date	Opportunity	Action	Responsible	Comments/Notes
July				
August				
September				
October				

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Resource: Things to Know About Your Donor

1. 3 Adjectives to Describe the Donor
2. What is their Passion?
3. How do they spend their free time?
4. What is their pet peeve?
5. Where else in the community do they support?
6. Where do they travel?
7. What is their fondest memory of the organization?
8. Who is their favorite person at the organization?
9. Who is their least favorite person at the organization?
10. What is the best/worst thing about the organization for them?
11. What do they want their legacy to be?
12. If you could do anything for this donor, no matter cost or time, what would it be and why?